

operations well into the future; some of these properties are now among the leading contributors to the output. In the search for new sources of gold much attention continues to be given to the older areas, large portions of which are overlain by glacial drift of considerable thickness. Geophysical methods of prospecting will be used to an increasing extent in determining the possibilities of such areas. In the outlying areas, interest has been greatly stimulated as a result of recent discoveries, and the indications are that, despite such handicaps as high transportation costs, these areas will receive increasing attention.

The Non-Ferrous Base-Metal Industry.—Canada has long been the leading producer of nickel and during the past twenty years it has been a leading producer of copper, lead and zinc. Almost all of its nickel production is obtained from the properties of International Nickel Company of Canada, Limited, in the Sudbury area and from the Falconbridge Mine in that area. Close to 50 p.c. of its copper production comes from the mines of International Nickel Company, the other chief sources of supply being the Noranda deposits in Quebec, the Flin Flon deposits in Manitoba and Saskatchewan, the Sherritt-Gordon Mine in Manitoba, and deposits of Britannia Mining and Smelting Company and of Granby Consolidated in British Columbia. About 96 p.c. of the lead output is obtained from the Sullivan Mine of Consolidated Mining and Smelting Company at Kimberley, B.C., and this Mine is also the source of about 55 p.c. of the zinc output, the remainder of which is obtained chiefly from the Flin Flon and Sherritt-Gordon deposits, and from mines in western Quebec.

Aside from the mines, concentrating plants and smelters, the productive facilities of the industry include a lead refinery and a zinc refinery at Trail, B.C., a zinc refinery at Flin Flon, Man., a copper refinery at Copper Cliff, Ont., a nickel refinery at Port Colborne, Ont., and a copper refinery at Montreal East in Quebec. From a capacity viewpoint these refineries are among the largest in the world, the copper refinery at Copper Cliff being the largest in the British Empire. In addition to these facilities the industry maintains extensive research and sales organizations, and thus it has a well-integrated physical set-up that makes for efficiency of operation.

On its return to peacetime operation the industry faced an uncertain outlook. In large areas of the world economic conditions were in a chaotic state and in others they were sufficiently unsettled to preclude any worthwhile appraisal of the prospects. However, within a few months, limited but definite headway had been made in the reconversion of industry and in due course the outlook for the base metals became somewhat less uncertain.

To appraise the outlook properly it would be necessary to take many factors into consideration, such as world consumption and production trends in relation to the four metals concerned, competitive production costs, stocks of the metals on hand in the chief consuming countries, changes that may arise as a result of the War in regard to matters affecting world export and import trade, and the probable trend of economic conditions in the chief metal-consuming countries. It is considered sufficient for the purpose of this article, however, to bring to attention certain features in respect to each of the four metals by way of suggesting the probable trend.

Copper.—Canada's production of this metal during the past decade has ranged from a low of approximately 211,000 tons in 1936 to a record output of 328,000 tons in 1940. It declined to 238,000 tons in 1945. During the years 1936 to