

**Statistics of the Combined Pulp and Paper Industries.\***—The manufacture of pulp, the manufacture of paper and the manufacture of products made of paper may, under certain conditions, be treated as three industries, for they are frequently carried on in separate plants by entirely independent companies. The manufacture of basic stock and the converting of this paper into stationery and other highly processed paper products are often combined in one plant. This further converting of paper within the pulp and paper industry itself represents only a small part of Canada's production of converted paper and boards, the bulk of which is still made in special converting mills classified in other industrial groups.

The presence of these different combinations in one mill makes it difficult to separate many of the statistics relating to the manufacture of pulp, basic paper and converted paper products. All converting operations carried on in paper-mills in this industry are attributed to the particular industrial group of converting plants to which they properly belong. Including manufacturing operations as far as the basic paper-making stage, there were altogether 123 mills in operation in 1949. The employees numbered 52,050 and their salaries and wages amounted to \$157,703,868. If the pulp made for their own use in combined pulp and paper mills is disregarded, the total value of materials and supplies used in the industry as a whole can be considered as amounting to \$348,662,719 in 1949, \$349,244,083 in 1948 and \$295,444,332 in 1947; the gross value of production as \$836,148,393 in 1949, \$825,857,664 in 1948 and \$706,971,628 in 1947; and net value of production, \$423,375,527 in 1949, \$412,770,470 in 1948 and \$356,084,900 in 1947.

The pulp and paper industry is one of the leading single manufacturing industries in Canada. In 1948 it was first in net value of production, in gross value of production and in salaries and wages paid, and third in employment. Only the manufacturing stages of the industry are considered in these comparisons, no allowance being made for capital invested, men employed, wages paid or primary products sold in connection with the woods operations. These form an important part of the industry as a whole but cannot be separated from woods operations carried on in connection with sawmills and other industries. In world trade, generally speaking, pulp and paper are Canada's main commodities; usually greater than wheat and far greater than nickel. Newsprint alone, over a considerable period, has brought Canada more export dollars than wheat, nickel or any other single commodity.† The United States market absorbs, annually, practically all pulpwood exports and over 80 p.c. of the pulp and the paper shipments of Canada. About one-half of the paper consumed in the United States is either of Canadian manufacture or is made from wood or wood-pulp imported from Canada.

At pp. 427-430 of the 1948-49 Year Book information is given on the veneer and plywood industries, the wood-using industries, and the paper-using industries.

\* See Chapter XVII and the Index for further particulars regarding the pulp and paper and paper-converting industries.

† For reasons given in Section I, Part I of Chapter XXII, gold is excluded from Canadian trade statistics.