

theless, these statistics, showing as they do the increase in the average size of the establishments, are still far from indicating the centralization of control which has been going on in various of the more important industries of Canada, particularly in the last quarter of a century. In the great industries of to-day the unit of operation often consists of several or even of many establishments, and the increasing concentration of control which has taken place of late years in Canadian industry is a matter of common knowledge. While the names of a very few large combinations have become household words, the smaller combinations of two or three establishments in an industry have almost escaped notice. Some evidence of the extent to which such combinations exist in Canada and how far the operations of a group of establishments are controlled from a single head-office is supplied by the Census of Manufactures. A file is kept in the Dominion Bureau of Statistics of all the establishments to which the schedules for the annual census of manufactures are sent, and a separate file for those cases where the schedules for two or more establishments are sent to a single head-office. This file gives us a list of combinations in their simplest and most openly acknowledged form, where two or more establishments are controlled from a single head-office. This, of course, does not cover the cases where control is maintained through stock ownership or interlocking directorates.

A study of the "head-office" file at Ottawa for 1924 reveals the existence of 295 such combinations, operating in all 1,273 establishments or about 6 p.c. of the total. These combinations are not peculiar to any particular class of industry, but are scattered throughout the nine industrial groups, as classified on the "chief component material" classification. The relative importance of this development in each of these industrial groups is roughly indicated by the percentage of all establishments in "head-office" combinations—as shown in Table 30. It will be seen that combinations, as thus indicated, are proportionately most numerous in the chemical products group.

30.—Establishments in Head-Office Combinations by General Groups of Industries, 1924.

Industrial Groups.	Number of head-office combinations.	Number of establishments in head-office combinations.	Total number of establishments.	Percentages of establishments in head-office combinations.
Vegetable products.....	36	228	4,414	5.2
Animal products.....	84	394	4,816	8.2
Textiles.....	39	137	1,781	7.7
Wood products.....	70	201	6,906	2.9
Iron products.....	26	102	1,003	9.8
Non-ferrous metal products.....	3	16	341	4.9
Non-metallic mineral products.....	13	101	1,095	9.1
Chemical products.....	13	75	457	16.4
Miscellaneous industries.....	6	19	1,365	1.4
Total.....	295	1,273	22,178	5.7

Since the 295 "head-office" combinations represent 1,273 establishments, each head-office on the average controls more than 4 operating factories, but this average conveys a misleading impression. No fewer than 141 of the head-offices each control only 2 establishments, while nine head-offices control 11 to 15 establishments each, four from 16 to 25 establishments each, two from 26 to 50 establishments each, and one over 50 establishments. The numbers of establishments controlled by these head-office combinations and their distributions by industrial groups are given in Table 31.