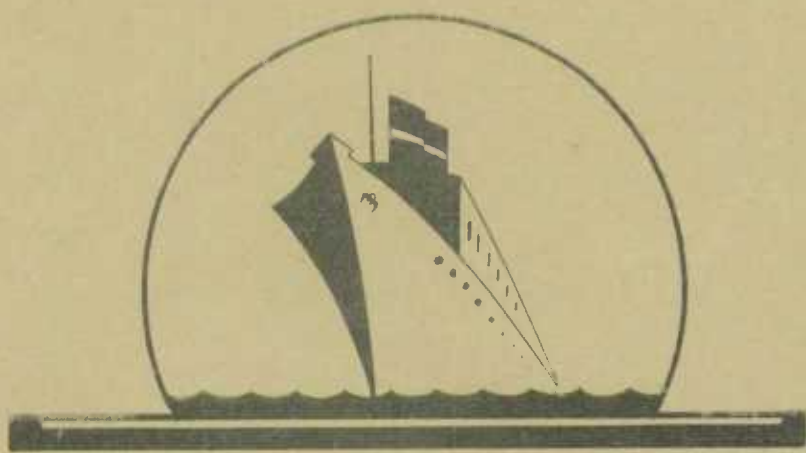


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GOVERNMENT OF CANADA



WATER TRANSPORTATION

1946, 1947, 1948

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DEPARTMENT OF TRADE AND COMMERCE**



**WATER TRANSPORTATION
1946, 1947, 1948**



Published by Authority of the Rt. Hon. C. D. Howe
Minister of Trade and Commerce

Prepared in the Transportation Division,
Dominion Bureau of Statistics, Ottawa



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WATER TRANSPORTATION

1947 <small>MILLION DOLLARS</small>	\$ FINANCIAL FACTS \$	1948 <small>MILLION DOLLARS</small>
166.3	Property Account	171.2
212.2	Operating Revenues	228.2
182.5	Operating Expenses	201.8
21.8	Fuel Consumed <small>Cost</small>	30.3
38.3	Employees <small>Total Salaries and Wages paid during Year</small>	42.9
225.9	Vessels as at End of Season <small>Value</small>	202.3
19.3	Net Profits	16.8



With this report, comprehensive financial statistics on the Water Transportation industry in Canada are presented for the first time. The annuals, "Shipping Report" and "Canal Statistics" which have been issued by the Transportation Division of the Bureau for many years cover shipping activities and waterborne commerce from the viewpoint of cargo, number of vessels arriving and departing or using facilities, etc. The Shipping Report gives registered net tonnage of vessels, arrivals and departures in foreign and coastwise trade, country of registry or flag of vessel, origin or destination of cargo, cargo tonnage by commodities and ports, etc., while Canal Statistics records vessel passages, tonnage of traffic by commodities, flag of vessel and type, and so on. The present study initiated for 1946 and covering the years, 1946 to 1948, is designed to round out the shipping picture in Canada and illustrate the importance of the water transportation industry to the national economy.

For the purposes of this report, Canada has been divided geographically into three divisions, i.e., the Atlantic Division including the eastern seaboard and the St. Lawrence River as far as Montreal; the Pacific Division embracing the western ocean ports and, finally, the Inland Division including the Great Lakes, Hudson Bay, the MacKenzie River and all other inland lakes and waterways. During 1946, however, the Inland Division was included with the Atlantic. Operators engaged solely in the fishing or lumbering trades or making separate reports to the Bureau covering vessel operations as part of their particular industry, are not included in this publication.

The report is compiled from schedules completed by 380 operators in 1946, 399 in 1947 and 384 in 1948. These operators range from the largest steamship companies down to the individual owner or operator with one vessel for hire. The tables are also tabulated by type

of operator, i.e., incorporated companies or individual owners and partnerships. As explained in the section entitled "Park Steamship Company", certain data for the year 1946 are not comparable with subsequent years and are inserted for historical purposes only. A copy of the water transportation annual reporting form used appears at the back of the report.

Railway companies operating inland or coastal marine service in conjunction with their rail activities include such service as part of their rail returns to the Bureau under "Water Line". Their water links are often considered as a continuation of the railway, for example, the car ferries and passenger ships from the mainland to Vancouver Island, Prince Edward Island, Newfoundland, and from Saint John, N.B., to Digby, N. S.

To avoid duplication this segment of the Water Transportation Industry has been excluded from the current publication. Ocean-going vessels in foreign service and owned by the railway companies or their subsidiaries do form a part of this report, providing these vessels are on the Canadian registry. The Canadian National (West Indies) Steamship Ltd. operate a service to the West Indies which is included as the vessels are of Canadian registry. The Canadian Pacific Steamships Company, however, operates several ocean-going craft in foreign service, the majority of which (such as the Empress and most Beaver classes) are on the British shipping register and, as a consequence, are not included in the present compilation.

Historical Review

Introduction

Down through the ages, world development and trade have followed closely in the adventurous wake of marine craft probing the mysteries of the unchartered seas. Early man, while undoubtedly making localized use of crude types of land carriage, was alert to the facilities offered by the swiftly flowing streams and their ability to furnish travelways to new domains. Much has been written of subsequent history and its interrelation and dependence on the surrounding oceans, and here it will suffice to mention a few of the pertinent details inasmuch as they concern Canada.

Fur Trade

Jacques Cartier and those following pushed in from the Atlantic exploring a great water highway discovered by Aubert in 1508, which led hundreds of miles through a vast tree-covered wilderness and flowed from huge inland lakes half a continent away from the mouth of this mighty river. This great highway, the St. Lawrence, became the avenue of approach and settlement for the early French emigrés and remained their source of communal intercourse for many generations. The vessels of the 16th and 17th century were able to sail as far as Quebec, usually with the assistance of smaller craft proceeding ahead sounding and marking the course. Larger vessels were able to operate cautiously between Quebec and Montreal with a certain degree of safety. The early French quickly adapted themselves to the Indian canoe and found it ideally suited for movement over the shoal and rapid infested inland rivers. By 1662, the urge of adventure and the lucrative fur trade, first by the French and later by the English, had pushed explorations westwards past the Great Lakes and north to James Bay. By 1793, Alexander MacKenzie had traversed the continent and gazed out upon the Pacific Ocean.

Canals

Although the St. Lawrence had become an artery of domestic commerce, it was not until the 1750's that the first real chart was drawn and then only from the ocean to Quebec in aid of Wolfe's expedition. During the remainder of the 18th century, little was done towards improving the channel above Montreal to the Lakes with the exception of a 2½ foot "canal" at points from Lachine to Prescott completed in 1783.

In 1798, the North West Fur Company constructed a 38 foot canal with a 9 foot lift at Sault Ste. Marie. This canal, preceding the first United States canal at this point by nearly 60 years was destroyed by American troops in 1814. After the war of 1812-15, Canadian canal building gained considerable impetus and by 1848, the St. Lawrence and all the Great Lakes except Lake Superior were connected by a minimum 9 foot Canadian channel. By 1903, the Canadian canals had been widened and improved to a depth of 14 feet from Montreal through into Lake Superior. (x)

Steam

At the turn of the 19th century, the St. Lawrence traffic was handled chiefly by small craft which could be poled over rapids and were convertible to sail. On the Great Lakes, keeled and sailing vessels were in evidence although their numbers were inadequate to serve shippers. It is estimated that only 1,100 tons of shipping were in service on Lake Ontario in 1811. The war of 1812-15 further retarded development and during this period only armed vessels plied the inland waters. However, after the war, expansion was rapid and sailing vessels were soon numbered in hundreds and actively engaged in the carriage of passengers, lumber, potash and other freight. This flourishing trade gave stimulus to shipbuilding and numerous yards sprang up along the Lakes.

By now steam had become an accepted mode of locomotion. In 1809, the "Accommodation" operating from Montreal was the first steam vessel on the St. Lawrence and the second in North America. In 1833, the "Royal William", a Canadian ship, was the first to cross the Atlantic wholly propelled by steam and the first to be equipped with watertight compartments. The hull of this ship was built in Quebec City and the engines in Montreal. Until 1841, all steam vessels were of the paddle wheel type and in this year the first propeller-driven ship appeared. By this time iron hulls had been introduced and had begun to replace wood. Sails, long carried on steamships as auxiliary equipment, were now being discarded. During 1866, there were some 1,067 steam ships and 4,016 sailing ships reported as entering Montreal Harbour, but by 1900 most of the large sailing vessels had disappeared.

(x) A special Study by the Bureau on the Waterways of Canada shows federal expenditures on canals, locks, wharves, grain elevators, bridges, etc., to be nearly \$287 millions from Confederation to 1934.

Great Lakes

During the initial 48 years of this century Canada's Great Lakes shipping fleets have been subjected to severe fluctuations imposed by two world wars, a major depression and strong competition from the United States. Furthermore, in the first half of the 19th century, another form of transportation had appeared and in 1836, a small 16 mile railway, the first in Canada, had been opened between Laprairie and St. Jean, Quebec. At the close of the century railway systems had developed and spanned the continent. Some departments of lake shipping, particularly passenger traffic, were severely affected by railway competition but the loss was more than counterbalanced by the feeder activities of the railways in transporting western products to the Head of the Lakes for trans-shipment and water carriage east. This route has proved particularly accommodating to the movement of western grain and the reduced carrying charges as compared with all-rail movement to the sea affords an advantage in world competition. Besides wheat and other grains, a bulk commodity trade in coal, stone, pulpwood, iron ore, sand, gravel, gasoline, petroleum, etc., has flourished on the Great Lakes. In addition, current plans call for a pipe line from Edmonton to Superior, Wisconsin, where petroleum will be carried to eastern refineries by huge tankers. The mighty eastbound lake carrier of today bearing 550,000 bushels of wheat is a far cry indeed from the little birch canoe of the *coureur-de-bois* running the Sault of Ste. Marie just two centuries ago.

Ocean Shipping

From 1900 to 1914 Canadian deep sea shipping activity declined and at the outbreak of World War 1 registrations amounted to a mere 47,000 tons. Due to high British losses during the war, the Imperial Munitions Board in 1917 contracted with Canadian shipbuilders to construct steel vessels, 37 of which were subsequently delivered to British managers. At the beginning of 1918, the Federal government launched a shipbuilding venture which, unfortunately, failed to deliver any vessels before the termination of hostilities. Thus, by 1920, some 334,430 gross tons of ocean-going shipping remained on the Canadian registry. The next two decades punctuated

by a period of prolonged trade depression, saw the fleet dwindle to 241,684 gross tons by 1939. The volume of Canada's commitments and the necessity for greater tonnage of shipping was recognized early in World War II. This was accentuated by the success of enemy submarine attacks, and, as a result, the Federal Government initiated another ship-building program and established the Park Steamship Company to own and operate its vessels. By 1945, Canada had 1,075,903 gross tons of sea-going shipping registered, an increase of some 345 per cent over 1939.

Park Steamship Company

General

The Park Steamship Company was organized as a crown company in 1942 in order to assist and expedite the transportation of essential commodities to the battle fronts. At its peak, the company supervised operation of a fleet of some 176 vessels representing a capital investment of \$270 millions. Following the war the fleet was gradually reduced through the sale of vessels to Canadian operators. It is estimated by the Canadian Maritime Commission that from the operation and sale of the ships, the government will recover some \$200 millions of its initial outlay of \$270 millions.

The inclusion of the Park Steamship Company in the following tables presents some difficulties in the matter of annual comparisons, particularly with 1946. In this year, the company reported operating revenues of \$92 millions with operating expenses amounting to only \$48 millions. Taking into consideration other income debits and credits, the Park company showed a net income of \$43 millions. As no income tax was deductible from this amount, the net profit for the entire water transportation industry during the year was exceptionally high at approximately \$56 millions. Therefore, excluding the crown company during 1946, the profit for the balance of the water transportation industry was approximately \$13 millions and more in line with 1947 and 1948 total profits, which were \$19 millions and

\$16.8 millions respectively.

By the end of 1946, the Park company fleet had been reduced to 118 vessels. Apparently no depreciation had been charged annually against the vessels until it was decided to liquidate the fleet in the fall of 1946. A depreciation item of \$95 millions against vessel account is shown in their monthly statement for December 1946, covering the remaining 118 vessels.

Therefore, due to the above peculiarities in the Park Steamship financial statements as compared to other operators, it has been decided to publish 1946 figures on water transportation only for historical reference and comparisons in this report are based on 1947 and 1948 statistics. Tables in Part V and VI, while not as inconsistent as the financial statements for 1946, are similarly treated.



PART I

Property Account

Table 1 presents a summary of property assets as reported by the Water Transportation industry. The value of all property assets after deducting accrued depreciation rose from a net of \$166.3 millions in 1947 to \$171.2 millions in 1948, an increase of 3 p.c. The gross or undepreciated value of vessels increased from \$225.9 millions to \$234.7 millions, an advance of \$8.8 millions. As noted in tables 20 and 21, the number of vessels owned or chartered increased from 1,738 in 1947 to 1,782 in 1948. During the latter year Canadian shipbuilders turned over (1) 21,000 gross tons of shipping to home operators. From tables 3 and 4 it will be noted that the "Inland, Incorporated" group showed the largest additions to vessel account, in the sum of \$7.7 millions.

There was a sharp rise in "other" assets as reported by the incorporated companies of the Atlantic Division. This sum during 1947 amounted to only \$566,000, while in 1948 the amount had risen to \$6.7 millions. This rapid increase is attributable in part to refundable portions of the excess profits tax and accounts receivable, and in part to investment in subsidiary and other companies. From 1947 to 1948, the net value of property assets dropped slightly among the individual and partnership group. The incorporated companies, however, advanced their net value from \$164.1 millions in 1947 to \$169.2 millions in 1948 chiefly due, as mentioned, to the greater value of vessels.

(1) Canadian Maritime Commission Report, June 30, 1949, page 28

Table 1

Comparative Statement of Property Account in the Canadian
Water Transportation Industry

1946, 1947, 1948

	1946 (1)		1947		1948	
	Gross Additions during Year	Total as at End of Year	Gross Additions during Year	Total as at End of Year	Gross Additions during Year	Total as at End of Year
	\$	\$	\$	\$	\$	\$
Land	123,819	5,617,235	68,556	4,571,889	24,727	4,162,178
Vessels	55,758,541	336,010,033	31,585,923	225,919,268	39,767,405	234,738,476
Docks, Wharves and Warehouses	375,651	9,801,159	237,030	6,974,548	12,918	6,725,212
Other Buildings	636,673	1,715,690	56,038	4,196,139	352,526	4,238,705
Supplies and Spare Equipment	199,793	956,727	970,580	1,412,369	296,856	1,154,264
Other	346,965	4,199,731	568,256	4,551,671	465,682	12,030,635
Total	57,441,442	358,300,575	33,486,383	247,625,884	40,920,114	263,049,470
Less Depreciation		160,006,547		81,288,455		91,806,920
Net Value		198,294,028		166,337,429		171,242,550

(1) Not comparable to subsequent years. See page 6.

Table 2

Property Account in the Canadian
Water Transportation Industry (By Divisions), 1946⁽¹⁾

	Land	Vessels	Docks, Wharves, Warehouses	Other Buildings	Supplies & Spare Equipment	Other	Total	Accrued Depreciation	Net Value
	\$	\$	\$	\$	\$	\$	\$	\$	\$
<u>Incorporated Companies</u>									
Atlantic Division	5,243,008	303,326,307	9,520,684	1,336,381	341,273	3,727,656	323,495,309	148,457,427	175,037,882
Pacific Division	365,802	30,940,808	274,860	348,993	598,914	452,336	32,981,713	11,291,008	21,690,705
Inland (including the Great Lakes) /									
Total Incorporated	5,608,810	334,267,115	9,795,544	1,685,374	940,187	4,179,992	356,477,022	159,748,435	196,728,587
<u>Individual Ownership & Partnership</u>									
Atlantic Division	8,425	1,230,792	5,615	30,017	15,405	10,808	1,301,062	172,822	1,128,240
Pacific Division	-	512,126	-	299	1,135	8,931	522,491	85,290	437,201
Inland (including the Great Lakes) /									
Total Individual, etc.	8,425	1,742,918	5,615	30,316	16,540	19,739	1,823,553	258,112	1,565,441
<u>All Operators</u>									
Total Atlantic Division	5,251,433	304,557,099	9,526,299	1,566,398	556,678	3,738,464	524,796,371	148,630,249	176,166,122
Total Pacific Division	365,802	31,452,934	274,860	349,292	600,049	461,267	33,504,204	11,576,298	22,127,906
Total Inland (including Great Lakes) /									
Grand Total	5,617,235	336,010,033	9,801,159	1,715,690	956,727	4,199,751	558,300,575	160,006,547	198,294,028

/ Included in Atlantic Division.

(1) Not comparable to subsequent years. See page 6.

Table 3

Property Account in the Canadian
Water Transportation Industry (By Divisions), 1947

	Land	Vessels	Docks, Wharves, Warehouses	Other Buildings	Supplies & Spare Equipment	Other	Total	Accrued Depreciation	Net Value
	\$	\$	\$	\$	\$	\$	\$	\$	\$
<u>Incorporated Companies</u>									
Atlantic Division	178,329	153,347,040	676,722	315,279	364,030	566,134	155,447,534	42,238,779	113,208,755
Pacific Division	423,154	36,111,506	334,621	573,597	533,623	768,972	38,545,473	12,325,194	26,220,279
Inland (including the Great Lakes)	3,961,781	33,929,826	5,946,145	3,480,052	471,035	3,141,389	50,930,228	26,263,224	24,667,004
Total Incorporated	4,563,264	223,388,372	6,957,488	4,168,928	1,368,688	4,476,495	244,923,235	80,827,197	164,096,038
<u>Individual Ownership & Partnership</u>									
Atlantic Division	2,125	1,661,073	5,459	19,099	17,469	32,722	1,737,947	299,469	1,438,478
Pacific Division	-	782,937	2,955	7,337	9,345	36,682	839,256	147,542	691,714
Inland (including the Great Lakes)	6,500	86,886	8,646	775	16,867	5,772	125,446	14,247	111,199
Total Individual, etc.	8,625	2,530,896	17,060	27,211	43,681	75,176	2,702,649	461,258	2,241,391
<u>All Operators</u>									
Total Atlantic Division	180,454	155,008,113	682,181	334,378	381,493	598,856	157,185,481	42,538,248	114,647,233
Total Pacific Division	423,154	36,894,443	337,576	380,934	542,968	805,654	39,384,729	12,472,736	26,911,993
Total Inland (Including the Great Lakes)	3,968,281	34,016,712	5,954,791	3,480,827	487,902	3,147,161	51,055,674	26,277,471	24,778,203
Grand Total	4,571,889	225,919,268	6,974,548	4,196,139	1,412,369	4,551,671	247,625,884	81,288,455	166,337,429

Table 4

Property Account in the Canadian
Water Transportation Industry (By Divisions), 1948

	Land	Vessels	Docks, Wharves, Warehouses	Other Buildings	Supplies & Spare Equipment	Other	Total	Accrued Depreciation	Net Value
	\$	\$	\$	¥	\$	\$	\$	\$	\$
<u>Incorporated Companies</u>									
Atlantic Division	337,462	154,321,698	701,768	358,997	616,458	7,345,911	165,682,294	48,380,047	115,302,247
Pacific Division	418,861	36,386,844	196,371	45,247	337,345	1,094,003	38,478,671	13,504,017	24,974,654
Inland (including the Great Lakes)	3,383,297	41,644,706	5,799,824	3,806,478	179,918	3,566,981	58,381,204	29,431,745	28,949,459
Total Incorporated	4,139,620	232,353,248	6,697,963	4,210,722	1,133,721	12,006,895	260,542,169	91,315,809	169,226,360
<u>Individual Ownership & Partnership</u>									
Atlantic Division	12,735	1,460,874	4,834	25,999	9,949	3,958	1,518,349	267,866	1,250,483
Pacific Division	8,723	787,413	15,745	1,534	3,069	16,380	832,864	190,469	642,395
Inland (including the Great Lakes)	1,100	136,941	6,670	450	7,525	3,402	156,088	32,776	123,312
Total Individual, etc.	22,558	2,385,228	27,249	27,983	20,543	23,740	2,507,301	491,111	2,016,190
<u>All Operators</u>									
Total Atlantic Division	350,197	155,782,572	706,602	384,996	626,407	7,349,869	165,200,643	48,647,913	116,552,730
Total Pacific Division	427,584	37,174,257	212,116	46,781	340,414	1,110,383	39,511,535	13,694,486	25,617,049
Total Inland (Including the Great Lakes)	3,384,397	41,781,647	5,806,494	3,806,928	187,443	3,570,383	58,537,292	29,464,521	29,072,771
Grand Total	4,162,178	234,758,476	6,725,212	4,258,705	1,154,264	12,030,635	263,049,470	91,806,920	171,242,550

PART II

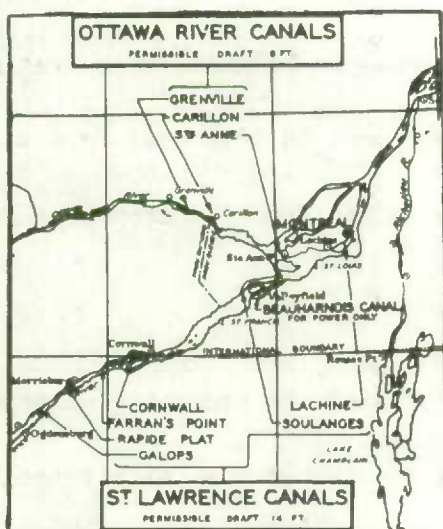
Income Account

Tables 5 to 11 are devoted to an analysis of income and expenditures. Tables 6, 7 and 8 present the financial operations by geographical divisions while tables 9, 10 and 11 show a further breakdown by division and type of operator. During 1947, world shipping enjoyed a high level of activity with considerable Canadian participation. During 1948, however, bidding for cargoes became much keener with foreign fleets on a stronger competitive basis and ocean freight rates declined somewhat.

In spite of the above, Canadian bottoms during 1948 carried 27.8 million tons of cargo in foreign trade to and from Canadian ports, as compared to 26.6 million tons during 1947. In addition, Canadian vessels carried over 33 million tons of freight (including duplication) through all inland canal systems during 1948 as opposed to 30.5 million tons in 1947. As a result, gross operating revenues for 1948 totalled \$228.3 millions, an increase of \$16.1 millions over the 1947 receipts of \$212.2 millions. Operating expenses in relation to operating revenues rose from 86 per cent in 1947 to 88.4 per cent in 1948 and, as a consequence, net profits for the latter year were down \$2.5 millions from the preceding year's total to \$16.8 millions.

In Chart 1 a comparison is drawn between the operating revenues and expenses for the two years under review, showing the percentages attributable to the different items within the totals. In both years, the percentage revenues received from the indicated sources remained fairly constant. Variations are noted in operating expenses, particularly between operation and rentals. The former shows a

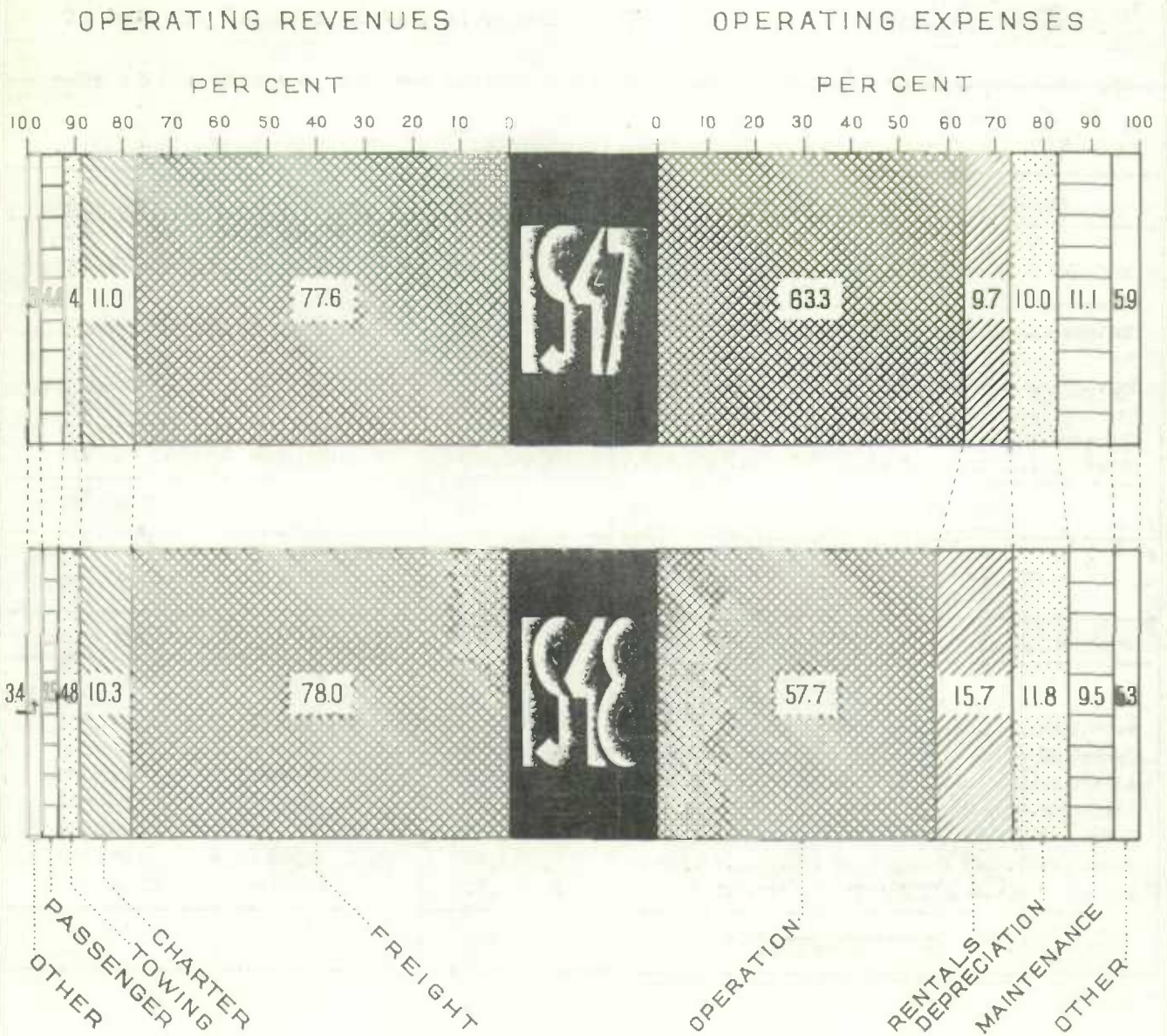
drop from 63.3 per cent of the total operating expenses to 57.7 per cent in 1948. Although the overall salary and wage average had risen from 1947 to 1948, there were 1,100 fewer employed in the industry (see chart 11 and tables 13 and 14). Similarly, although the average costs of fuel had risen, there were 26 fewer vessels in actual service during 1948 as compared to 1947 (see tables 20 and 21). Briefly, the portion of expenses attributable to operation expanded to a smaller degree than the total operating expenses. On the other hand, rentals increased to a greater degree as a percentage of the total. The increase in rentals from 9.7 per cent of the total operating expenses to 15.7 per cent in 1948 represents numerically a rise from \$17.7 millions to \$31.8 millions. This latter rise has been caused chiefly through increased tanker rentals paid by the principal oil importing companies whose domestic fleets were not large enough to carry the greatly increased imports required to meet the post war demands for petroleum and gasoline. Cargoes of foreign gasoline unloaded at Canadian ports during 1948 totalled 883,095 tons compared with 499,449 tons in 1947, while crude petroleum increased from 4,019,306 to 4,850,511 tons.



Beauharnois Canal
Site of First Canal
System on the St. Lawrence River

CHART 1

PERCENTAGE OPERATING REVENUES AND EXPENSES IN THE CANADIAN WATER TRANSPORTATION INDUSTRY 1947-48



The Canadian Water Transportation Industry
1946, 1947, 1948

Table 5

Income Account

	(1) 1 9 4 6	1 9 4 7	1 9 4 8
	\$	\$	\$
<u>Income</u>			
Gross Operating Revenue	233,598,964	212,156,158	228,273,587
Other Income	3,738,754	2,124,699	2,374,960
Gross Income	237,337,718	214,280,857	230,648,547
<u>Expenses</u>			
Operating Expenses	171,132,712	182,517,005	201,780,536
Other Expenses	2,776,585	2,401,450	3,427,232
Total Expenses (excluding Income Tax)	173,909,297	184,918,455	205,207,768
Net Income before Income Tax	63,428,421	29,362,402	25,440,779
Provision for Income Tax	7,376,570	10,029,562	8,603,351
Profit for Year	56,051,851	19,332,840	16,837,428

Operating Revenue

Source	1 9 4 6	1 9 4 7	1 9 4 8
	\$	\$	\$
Passenger	7,622,474	9,377,859	7,995,800
Freight	185,453,205	164,715,736	178,085,843
Towing	5,999,579	8,626,564	10,996,311
Salvage	824,249	679,035	1,026,060
Storage	63,799	4,137	55,293
Charters	29,145,115	23,466,495	23,573,808
Other	4,490,543	5,286,332	6,540,472
Total Operating Revenue	233,598,964	212,156,158	228,273,587

Operating Expenses

	1 9 4 6	1 9 4 7	1 9 4 8
	\$	\$	\$
Maintenance	21,415,505	20,340,965	19,240,355
Operation	110,638,215	115,651,967	115,876,632
Advertising	473,055	481,898	582,791
Administration and General	9,537,134	9,584,652	10,199,858
Depreciation and Insurance	13,388,901 (2)	18,283,064 (2)	23,864,529 (3)
Taxes (excluding Income Tax)	614,130	485,387	217,950
Rentals for Vessels, Buildings, etc.	15,065,772	17,689,072	31,798,441
Total Operating Expenses	171,132,712	182,517,005	201,780,536

(1) Not comparable to subsequent years. See page 6.
(2) Depreciation only.

(3) Includes Insurance - \$8,560,955 for 1948.

Table 6 Income Account in the Canadian
Water Transportation Industry (By Divisions)
1946 (1)

	Incorporated & Individual Ownership & Partnership			
	Atlantic Division	Pacific Division	Inland Division (including the Great Lakes)	Total
	\$	\$	\$	\$
<u>Operating Revenue</u>			/	
Passenger	7,248,575	373,901		7,622,474
Freight	164,951,937	20,501,268		185,453,205
Towing	1,649,947	4,349,632		5,999,579
Salvage	660,051	164,198		824,249
Storage	52,306	11,493		63,799
Charter	27,783,438	1,361,677		29,145,115
Other	3,617,467	873,076		4,490,543
Total Operating Revenue	205,963,719	27,635,245		233,598,964
Other Income	3,665,335	73,419		3,738,754
Gross Income	209,629,054	27,708,664		237,337,718
<u>Operating Expenses</u>				
Maintenance	18,956,593	2,458,912		21,415,505
Operation (Salaries and Wages)	97,554,555	13,083,660		110,638,215
Advertising	447,517	25,538		473,055
Administration	8,013,261	1,523,873		9,537,134
Depreciation	9,664,914	3,723,987		13,388,901
Taxes	592,871	21,259		614,130
Rental for Vessels, Buildings, etc.	14,194,176	871,596		15,065,772
Total Operating Expenses	149,423,887	21,708,825		171,132,712
Other Expenses (excluding Income Tax)	2,054,389	722,196		2,776,585
Total Expenses	151,478,276	22,431,021		173,909,297
Net Income before Income Tax	58,150,778	5,277,643		63,428,421
Less Provision for Income Tax	5,785,413	1,591,157		7,376,570
Profit for Year	52,365,365	3,686,486		56,051,851

/ Included in Atlantic Division.

(1) Not comparable to subsequent years. See page 6.

Table 7 Income Account in the Canadian Water Transportation Industry (By Divisions)

1 9 4 7

	Incorporated & Individual Ownership & Partnership			
	Atlantic Division	Pacific Division	Inland Division (including the Great Lakes)	Total
	\$	\$	\$	\$
<u>Operating Revenue</u>				
Passenger	4,299,179	506,042	4,572,638	9,377,859
Freight	115,926,588	28,992,292	19,796,856	164,715,736
Towing	1,087,413	6,753,637	785,484	8,626,564
Salvage	400,142	265,998	12,895	679,035
Storage	1,100	710	2,327	4,137
Charter	19,887,365	3,541,281	37,849	23,466,495
Other	2,862,672	1,420,016	1,003,644	5,286,332
Total Operating Revenue	144,464,459	41,480,006	26,211,693	212,156,158
Other Income	905,948	25,582	1,193,169	2,124,699
Gross Income	145,370,407	41,505,588	27,404,862	214,280,857
<u>Operating Expenses</u>				
Maintenance	13,709,453	3,390,025	3,241,487	20,340,965
Operation	76,455,391	21,773,814	17,422,762	115,651,967
Advertising	253,025	52,855	176,018	481,898
Administration	5,475,349	1,844,605	2,264,698	9,584,652
Depreciation	12,137,012	4,026,970	2,119,082	18,283,064
Taxes	253,104	178,270	54,013	485,387
Rentals for Vessels, Buildings, etc.	16,489,101	1,012,996	186,975	17,689,072
Total Operating Expenses	124,772,435	32,279,535	25,465,035	182,517,005
Other Expenses (excluding Income Tax)	1,459,396	507,733	434,321	2,401,450
Total Expenses	126,231,831	32,787,268	25,899,356	184,918,455
Net Income before Income Tax	19,138,576	8,718,320	1,505,506	29,362,402
Less Provision for Income Tax	6,200,996	3,300,101	528,465	10,029,562
Profit for Year	12,937,580	5,418,219	977,041	19,332,840

Table 8

Income Account in the Canadian
Water Transportation Industry (By Divisions)

1 9 4 8

	Incorporated & Individual Ownership & Partnership			
	Atlantic Division	Pacific Division	Inland Division (including the Great Lakes)	Total
	\$	\$	\$	\$
<u>Operating Revenue</u>				
Passenger	2,434,000	599,696	4,962,104	7,995,800
Freight	121,682,840	30,871,281	25,531,722	178,085,843
Towing	1,805,586	8,167,014	1,023,711	10,996,311
Salvage	842,364	151,934	31,762	1,026,060
Storage	1,409	52,603	1,281	55,293
Charter	18,668,531	3,589,832	1,315,445	23,573,808
Other	3,438,821	1,641,297	1,460,354	6,540,472
Total Operating Revenue	148,873,551	45,073,657	34,326,379	228,273,587
Other Income	1,047,054	54,473	1,273,433	2,374,960
Gross Income	149,920,605	45,128,130	35,599,812	230,648,547
<u>Operating Expenses</u>				
Maintenance	10,888,874	4,408,860	3,942,621	19,240,355
Operation	69,221,323	25,061,077	21,594,232	115,876,632
Advertising	330,684	51,108	200,999	582,791
Administration and General	5,640,331	2,134,634	2,424,873	10,199,838
Depreciation	10,027,660	2,907,881	2,368,055	15,303,596
Taxes	112,381	43,668	61,901	217,950
Rental for Vessels, Buildings, etc.	28,990,150	2,623,912	184,379	31,798,441
Insurance	6,084,487	1,813,449	662,997	8,560,933
Total Operating Expenses	131,295,890	39,044,589	31,440,057	201,780,536
Other Expenses (excluding Income Tax)	2,572,728	386,548	467,956	3,427,232
Total Expenses	133,868,618	39,431,137	31,908,013	205,207,768
Net Income before Income Tax	16,051,987	5,696,993	3,691,799	25,440,779
Less Provision for Income Tax	5,087,290	2,313,080	1,202,981	8,603,351
Profit for Year	10,964,697	3,383,913	2,488,818	16,857,428

Table 9

Income Account in the Canadian
Water Transportation Industry (By Divisions & Type of Operator)

(1)
1946

	Incorporated			Individual Ownership & Partnership			Total
	Atlantic Division	Pacific Division	Inland Division (including the Great Lakes)	Atlantic Division	Pacific Division	Inland Division (including the Great Lakes)	
	\$	\$	\$	\$	\$	\$	\$
<u>Operating Revenue</u>			/			/	
Passenger	7,156,297	362,769		92,276	11,132		7,622,474
Freight	164,299,542	20,467,338		652,395	33,930		185,453,205
Towing	1,605,273	4,041,924		44,674	307,708		5,999,579
Salvage	658,944	160,191		1,107	4,007		824,249
Storage	45,106	11,493		7,200	-		63,799
Charter	27,733,532	1,290,336		49,906	71,341		29,145,115
Other	3,538,811	864,140		78,656	8,936		4,490,543
Total Operating Revenue	205,037,505	27,198,191		926,214	437,054		233,598,964
Other Income	3,664,355	71,468		980	1,951		3,738,754
Gross Income	208,701,860	27,269,659		927,194	439,005		237,337,718
<u>Operating Expenses</u>							
Maintenance	18,792,670	2,345,778		163,923	113,134		21,415,505
Operation	97,258,263	12,955,539		296,292	128,121		110,638,215
Advertising	439,871	25,336		7,646	202		473,055
Administration	7,832,728	1,510,260		180,533	13,613		9,537,134
Depreciation	9,598,443	3,693,895		66,471	30,092		13,388,901
Taxes	585,221	20,548		7,650	711		614,130
Rentals for Vessels, Buildings, etc.	14,171,728	869,310		22,448	2,286		15,065,772
Total Operating Expenses	148,678,924	21,420,666		744,963	288,159		171,132,712
Other Expenses (excluding Income Tax)	2,024,448	718,819		29,941	3,377		2,776,585
Total Expenses	150,703,372	22,139,485		774,904	291,536		173,909,297
Net Income before Income Tax	57,998,488	5,150,174		152,290	147,469		63,428,421
Less Provision for Income Tax	5,781,084	1,584,000		4,329	7,157		7,376,570
Profit for Year	52,217,404	3,546,174		147,961	140,312		56,051,851

/ Included with Atlantic Division.

(1) Not comparable to subsequent years. See page 6.

Table 10

Income Account in the Canadian
Water Transportation Industry (By Divisions & Type of Operator)

1 9 4 7

	Incorporated			Individual Ownership & Partnership			Total
	Atlantic Division	Pacific Division	Inland Division (including the Great Lakes)	Atlantic Division	Pacific Division	Inland Division (including the Great Lakes)	
	\$	\$	\$	\$	\$	\$	\$
<u>Operating Revenue</u>							
Passenger	4,237,026	481,704	4,558,834	62,153	24,338	13,804	9,377,859
Freight	115,400,557	28,945,184	19,792,202	526,031	47,108	4,654	164,715,736
Towing	1,022,404	6,339,200	779,882	65,009	414,467	5,602	8,626,564
Salvage	400,142	261,549	3	-	4,449	12,892	679,035
Storage	1,100	710	2,327	-	-	-	4,137
Charter	19,358,518	3,425,227	36,006	528,847	116,054	1,843	23,466,495
Other	2,785,956	1,397,246	985,199	76,716	22,770	18,445	5,286,332
Total Operating Revenue	143,205,703	40,850,820	26,154,453	1,258,756	629,186	57,240	212,156,158
Other Income	905,858	25,582	1,193,169	90	-	-	2,124,699
Gross Income	144,111,561	40,876,402	27,347,622	1,258,846	629,186	57,240	214,280,857
<u>Operating Expenses</u>							
Maintenance	13,354,333	3,292,209	3,225,610	355,120	97,816	15,877	20,340,965
Operation	75,921,882	21,569,552	17,395,340	533,509	204,262	27,422	115,651,967
Advertising	248,700	51,979	175,806	4,325	876	212	481,898
Administration	5,427,142	1,821,287	2,261,787	48,207	23,318	2,911	9,584,652
Depreciation	11,952,345	3,982,946	2,112,852	184,667	44,024	6,230	18,283,064
Taxes	251,459	177,059	53,946	1,645	1,211	67	485,387
Rental for Vessels, Buildings, etc.	16,471,259	969,056	186,872	17,842	43,940	603	17,689,072
Total Operating Expenses	123,627,120	31,864,088	25,411,713	1,145,315	415,447	53,322	182,517,005
Other Expenses (excluding Income Tax)	1,439,269	495,392	432,463	20,127	12,341	1,858	2,401,450
Total Expenses	125,066,389	32,359,480	25,844,176	1,165,442	427,788	55,180	184,918,455
Net Income before Income Tax	19,045,172	8,516,922	1,503,446	93,404	201,398	2,060	29,362,402
Less Provision for Income Tax	6,197,475	3,290,724	528,405	3,521	9,377	60	10,029,562
Profit for Year	12,847,697	5,226,198	975,041	89,883	192,021	2,000	19,332,840

Table 11

Income Account in the Canadian
Water Transportation Industry (By Divisions & Type of Operator)

1948

	Incorporated			Individual Ownership & Partnership			Total
	Atlantic Division	Pacific Division	Inland Division (including the Great Lakes)	Atlantic Division	Pacific Division	Inland Division (including the Great Lakes)	
	\$	\$	\$	\$	\$	\$	\$
<u>Operating Revenue</u>							
Passenger	2,369,321	581,991	4,944,738	64,679	17,705	17,366	7,995,800
Freight	121,230,545	30,860,614	25,512,367	452,295	10,667	19,355	178,085,843
Towing	1,766,073	7,653,476	1,020,135	39,513	513,538	3,576	10,996,311
Salvage	842,364	126,083	16,850	-	25,851	14,912	1,026,060
Storage	1,109	52,603	1,281	300	-	-	55,293
Charter	18,220,133	3,488,832	1,303,708	448,398	101,000	11,737	23,573,808
Other	3,331,729	1,616,543	1,438,220	107,092	24,754	22,134	6,540,472
Total Operating Revenue	147,761,274	44,380,142	34,237,299	1,112,277	693,515	89,080	228,273,587
Other Income	1,045,869	54,473	1,273,433	1,185	-	-	2,374,960
Gross Income	148,807,143	44,434,615	35,510,732	1,113,462	693,515	89,080	230,648,547
<u>Operating Expenses</u>							
Maintenance	10,722,146	4,305,754	3,929,606	166,728	103,106	13,015	19,240,355
Operation	68,571,001	24,834,733	21,559,014	650,322	226,344	35,218	115,876,632
Advertising	325,432	50,155	200,348	5,252	953	651	582,791
Administration	5,608,619	2,107,806	2,417,161	31,712	26,828	7,712	10,199,838
Depreciation	9,919,713	2,856,531	2,357,102	107,947	51,350	10,953	15,303,596
Taxes	108,754	41,456	61,817	3,627	2,212	84	217,950
Rental for Vessels, Buildings, etc.	28,975,839	2,621,600	183,483	14,311	2,312	896	31,798,441
Insurance	6,051,459	1,788,670	660,121	33,028	24,779	2,876	8,560,933
Total Operating Expenses	130,282,963	38,606,705	31,368,652	1,012,927	437,884	71,405	201,780,536
Other Expenses (excluding Income Tax)	2,561,926	377,062	467,064	10,802	9,486	892	3,427,232
Total Expenses	132,844,889	38,983,767	31,835,716	1,023,729	447,370	72,297	205,207,768
Net Income before Income Tax	15,962,254	5,450,848	3,675,016	89,733	246,145	16,783	25,440,779
Less Provision for Income Tax	5,084,321	2,300,112	1,202,881	2,969	12,968	100	8,603,351
Profit for Year	10,877,933	3,150,736	2,472,135	86,764	233,177	16,683	16,837,428

PART III

Employment and Earnings

There were 21,751 employees reported as actively engaged in the industry during 1948 as compared with 22,851 during 1947. The wage and salary bill, however, for the latter year was only \$38 millions as compared to nearly \$43 millions during 1948. In Chart 111 the average annual earnings are presented according to type of employment. Although the annual averages in some cases appear relatively small during a period of high prosperity, it must be remembered that much of the water transportation industry included in this report is of a seasonal nature, particularly on the inland waterways where the season of navigation is usually eight months or less and, as a consequence, are not representative of a full year's employment. The average earnings of dock and warehouse workers rose sharply during the year 1948 as compared with 1947. Vessel crews show improved earnings, although not to the same extent as dock workers. Other employees' earnings, including office and administrative classes, remained fairly constant from 1947 to 1948. During both years, salaries and wages represented about 21 per cent of total operating expenses and over 23 per cent when the value of meals supplied is added. Withdrawals not included in the salary and wage total, are sums deducted by owner-operators of vessels as their own remuneration. This practice is naturally much more general among the individual owners and partnerships than among incorporated companies.

Next to that of the United States, Canada's wage and salary scale is the highest in world shipping circles. The consequent higher daily operating costs, in relation to competitor nations, now serve as a deterrent towards profitable participation in ocean-going trade.

The following excerpt from the Canadian Maritime Commission report displays by country of flag the estimated daily wages, allowances and overtime costs during 1948 for a 10,000 ton deadweight standard war built vessel. The figures are based on official exchange rates in effect March 31, 1949. The countries are listed in descending order, as shown in the report, according to the total estimated daily operating costs exclusive of fuel oil and depreciation.

	United States	Canada	Panama	France	Greece	United Kingdom	Norway	Netherlands	Italy
	\$	\$	\$	\$	\$	\$	\$	\$	\$
				(Canadian dollars)					
Wages, Allowances, etc.	392.66	308.30	199.89	215.22	228.60	150.15	146.29	194.11	122.42
Overtime	102.21	37.20	43.73	8.72	8.00	21.41	11.73	14.17	11.55
Total	494.87	345.50	243.62	223.94	236.60	171.56	158.02	208.28	133.97

CHART 3

AVERAGE ANNUAL EARNINGS IN THE WATER TRANSPORTATION INDUSTRY BY CLASS OF EMPLOYEE, 1947-48

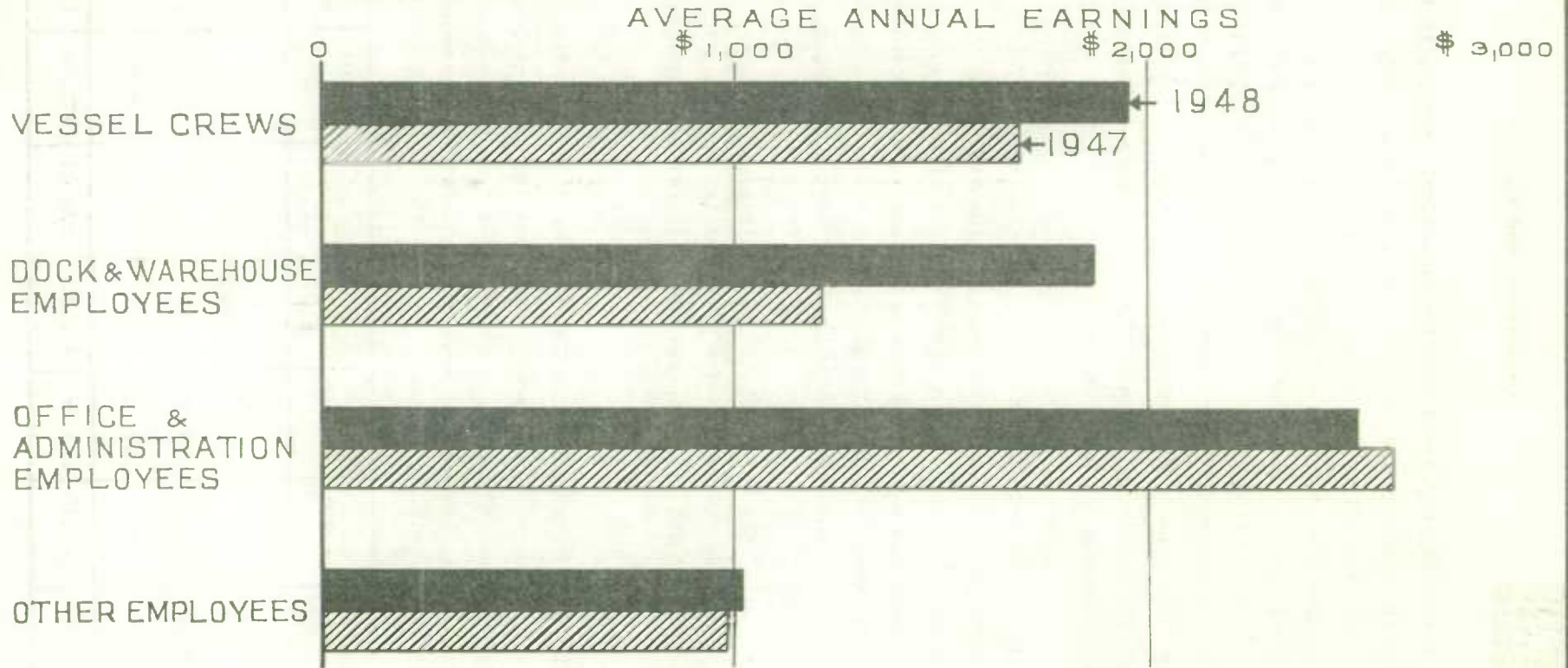


Table 12

Number of Employees and Earnings in the Canadian
Water Transportation Industry (By Divisions)

1 9 4 6 (1)

	Vessel Crews		Dock and Warehouse Employees		Office Administration Employees		Other Employees		T o t a l		With- drawals not included in Total	Value of Meals Supplied	Amount of Salaries Paid to Employees with Home Address in Canada
	No.	Salaries and Wages	No.	Salaries and Wages	No.	Salaries and Wages	No.	Salaries and Wages	No.	Salaries and Wages			
		\$		\$		\$		\$		\$		\$	
<u>Incorporated Companies</u>													
Atlantic Division	12,777	23,769,066	2,193	2,818,146	1,199	3,041,716	379	277,529	16,548	29,906,457	13,147	4,431,517	29,196,223
Pacific Division	2,909	4,721,120	160	250,959	268	707,244	111	240,275	3,448	5,919,598	32,057	774,251	5,799,740
Inland (including the Great Lakes) †													
Total Incorporated	15,686	28,490,186	2,353	3,069,105	1,467	3,748,960	490	517,804	19,996	35,826,055	45,204	5,205,768	54,995,963
<u>Individual Ownership & Partnership</u>													
Atlantic Division	337	242,952	5	4,829	15	11,050	8	5,141	365	263,972	49,379	42,027	248,401
Pacific Division	51	67,511	-	-	8	3,037	7	5,963	66	76,511	52,701	5,127	76,511
Inland (including the Great Lakes) †													
Total Individual, etc.	388	310,463	5	4,829	23	14,087	15	11,104	431	340,483	102,080	47,154	324,912
<u>All Operators</u>													
Total Atlantic Division	13,114	24,012,018	2,198	2,822,975	1,214	3,052,766	387	282,670	16,913	30,170,429	62,526	4,473,544	29,444,624
Total Pacific Division	2,960	4,788,631	160	250,959	276	710,281	118	246,238	3,514	5,996,109	84,758	779,378	5,876,251
Total Inland (including the Great Lakes) †													
Grand Total	16,074	28,800,649	2,358	3,073,934	1,490	3,763,047	505	528,908	20,427	36,166,538	147,284	5,252,922	55,320,875

† Included with Atlantic Division.

(1) Not comparable to subsequent years. See page 6.

Table 13

Number of Employees and Earnings in the Canadian
Water Transportation Industry (By Divisions)

1 9 4 7

	Vessel Crews		Dock and Warehouse Employees		Office Administration Employees		Other Employees		T o t a l		With- drawals not included in Total	Value of Meals Supplied	Amount of Salaries Paid to Employees with Home Address in Canada	
	No.	Salaries and Wages	No.	Salaries and Wages	No.	Salaries and Wages	No.	Salaries and Wages	No.	Salaries and Wages				
<u>Incorporated Companies</u>		\$		\$		\$		\$		\$		\$		\$
Atlantic Division	10,369	19,470,184	308	517,045	810	2,132,755	54	54,534	11,541	22,174,518	11,710	3,569,852	19,391,996	
Pacific Division	2,701	5,589,002	211	406,440	323	890,432	107	222,702	3,342	7,108,576	8,437	824,873	6,794,607	
Inland (including the Great Lakes)	4,244	4,486,717	2,408	2,647,654	482	1,191,010	367	263,066	7,501	8,588,447	4,563	343,037	8,510,234	
Total Incorporated	17,314	29,545,903	2,927	3,571,139	1,615	4,214,197	528	540,302	22,384	37,871,541	24,715	4,737,762	34,696,857	
<u>Individual Ownership & Partnership</u>														
Atlantic Division	317	298,826	19	3,786	7	4,360	19	4,197	362	311,169	41,468	27,101	283,180	
Pacific Division	57	81,507	1	345	9	10,221	4	4,447	71	96,520	77,016	9,864	96,520	
Inland (including the Great Lakes)	22	11,394	3	2,987	1	1,040	8	1,345	34	16,766	6,147	1,103	16,766	
Total Individual, etc.	396	391,727	23	7,118	17	15,621	31	9,989	467	424,455	124,631	38,068	396,466	
<u>All Operators</u>														
Total Atlantic Division	10,686	19,769,010	327	520,831	817	2,137,115	73	58,731	11,903	22,485,687	53,178	3,596,953	19,675,176	
Total Pacific Division	2,758	5,670,509	212	406,785	332	900,653	111	227,149	3,413	7,205,096	85,453	834,737	6,891,127	
Total Inland (including the Great Lakes)	4,266	4,498,111	2,411	2,650,641	483	1,192,050	375	264,411	7,535	8,605,213	10,715	344,140	8,527,000	
Grand Total	17,710	29,937,630	2,950	3,578,257	1,632	4,229,818	559	550,291	22,851	38,295,996	149,346	4,775,830	35,093,303	

Table 14

Number of Employees and Earnings in the Canadian
Water Transportation Industry (By Divisions)

1 9 4 8

	Vessel Crews		Dock and Warehouse Employees		Office Administration Employees		Other Employees		Total		With drawsals not included in Total	Value of Meals Supplied	Amount of Salaries Paid to Employees with Home Address in Canada
	No.	Salaries and Wages	No.	Salaries and Wages	No.	Salaries and Wages	No.	Salaries and Wages	No.	Salaries and Wages			
<u>Incorporated Companies</u>		\$		\$		\$		\$		\$		\$	\$
Atlantic Division	9,531	20,277,246	319	513,509	817	2,522,080	49	62,324	10,716	23,375,159	3,750	2,972,267	20,437,306
Pacific Division	3,086	7,210,272	221	457,657	303	922,547	61	107,321	3,671	8,697,797	12,662	858,902	7,362,150
Inland (including the Great Lakes)	4,284	5,859,937	1,499	2,864,866	807	1,332,606	367	322,390	6,957	10,379,819	8,364	1,558,003	7,744,291
Total Incorporated	16,901	33,347,455	2,039	3,836,052	1,927	4,777,233	477	492,035	21,344	42,452,775	24,776	5,389,172	35,543,747
<u>Individual Ownership & Partnership</u>													
Atlantic Division	294	290,800	6	3,877	9	5,105	4	2,538	313	302,320	33,335	56,113	292,023
Pacific Division	56	107,805	-	-	12	9,087	2	290	70	117,182	112,520	7,384	117,182
Inland (including the Great Lakes)	18	13,315	1	546	1	600	4	1,758	24	16,199	8,774	200	16,199
Total Individual, etc.	368	411,920	7	4,423	22	14,792	10	4,566	407	435,701	154,629	63,697	425,404
<u>All Operators</u>													
Total Atlantic Division	9,825	20,568,046	325	517,386	826	2,527,185	53	64,862	11,029	23,677,479	37,085	3,028,380	20,729,329
Total Pacific Division	3,142	7,318,077	221	457,657	315	931,634	63	107,611	3,741	8,814,979	125,182	866,286	7,479,332
Total Inland (including the Great Lakes)	4,302	5,873,252	1,500	2,869,432	808	1,333,206	371	324,128	6,981	10,596,018	17,138	1,558,203	7,760,490
Grand Total	17,269	33,759,375	2,046	3,840,475	1,949	4,792,025	487	496,601	21,751	42,888,476	179,405	5,452,869	35,969,151

PART IV

Fuel Consumption and Cost

Expenditures on vessel fuels and the amounts consumed are shown in Tables 16, 17 and 18. Prior to 1948, fuel oil, diesel oil and gasoline were reported in barrels of 35 imperial gallons. However, for 1948, it was found more practical to have the operators report their consumption in gallons. Comparisons between 1947 and 1948 quantities can readily be effected by dividing figures for the latter year by 35. Other fuel includes wood or any other combustible material which might be utilized for vessel operation. The diversity of these items prohibits any standard measurement and hence the quantity column has been left blank.

During 1948, fuel expenditures, reflecting increased unit costs, were much heavier than in 1947, rising from \$21.8 millions to \$30.3 millions. Total coal consumption was down from 820 thousand tons in 1947 to 748 thousand tons in 1948. The average cost per ton, however, rose from \$8.90 to \$10.80. Fuel oil consumption advanced from 189.5 million to 228.7 million gallons and showed an increase in average cost per gallon from 6.7 cents in 1947 to 8.5 cents in 1948. Diesel oil consumption was up to 17.6 million gallons in 1948 from a 1947 total of 14.4 million gallons. The average cost per gallon rose from 9.5 to 13.1 cents. Gasoline consumption declined from 471,345 gallons in 1947 to 382,081 gallons in 1948. The average cost per gallon, however, advanced from 26 to 28 cents.

Incorporated companies paid out 59 per cent of their fuel bill on fuel oil during 1947 and over 65 per cent in 1948. The individual owner and partnership group showed a preference for diesel oil, as the latter represented 61 per cent of their 1947 fuel bill and 58 per cent during 1948.



CHART 2

EXPENDITURES ON FUEL

BY CANADIAN MARINE OPERATORS

1947-48

MILLION

MILLION

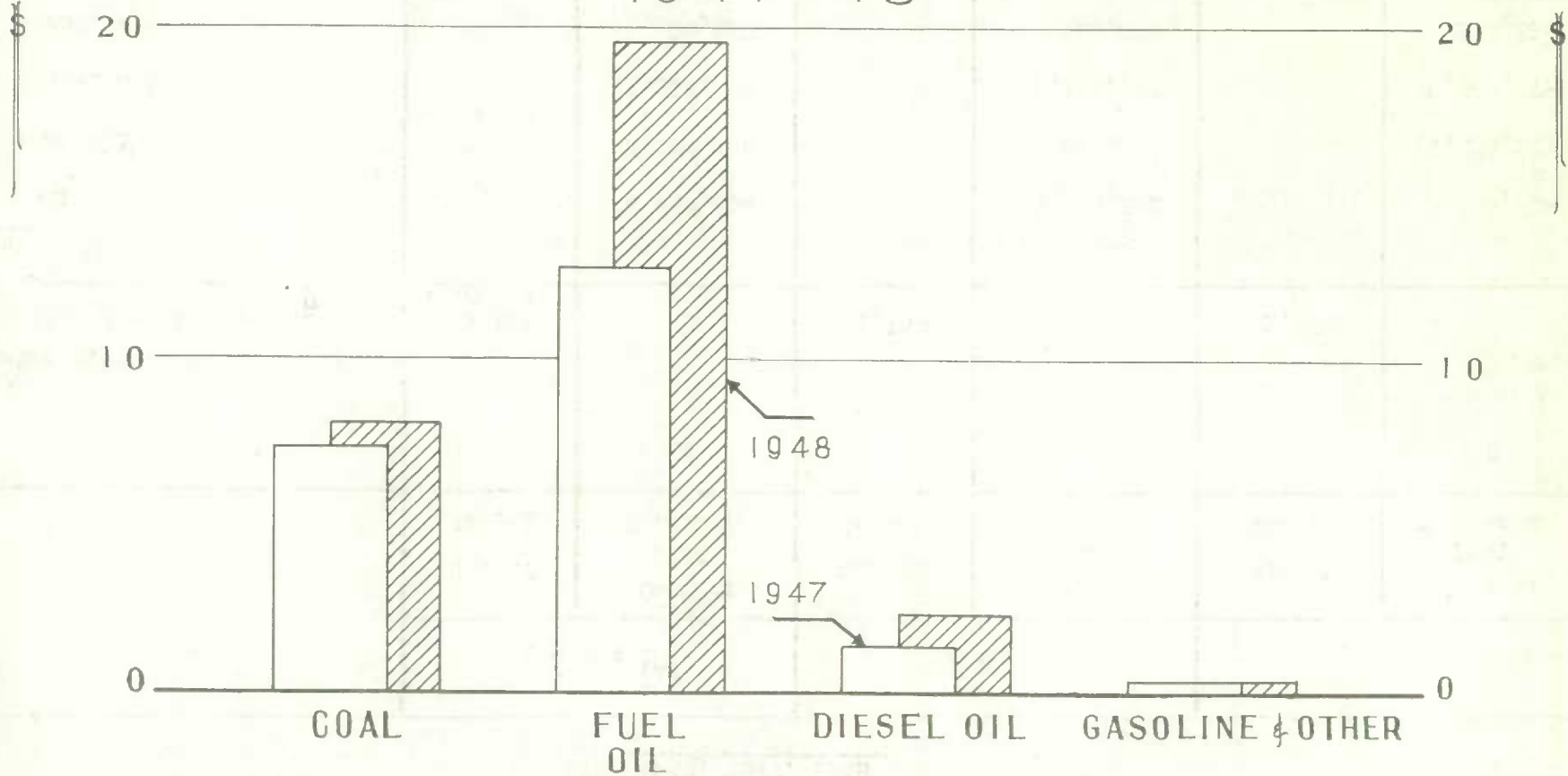


Table 15

Comparative Statement showing Expenditures on Fuel
and Amount Consumed by Canadian Marine Operators

1946, 1947, 1948

	1946 ⁽¹⁾		1947		1948	
	No. of Vessels	Cost of Fuel Consumed	No. of Vessels	Cost of Fuel Consumed	No. of Vessels	Cost of Fuel Consumed
Number of Vessels - Owned or Chartered	1,696	\$	1,738	\$	1,782	\$
<u>Fuel</u>						
Coal		6,659,404		7,335,612		8,060,506
Fuel Oil		13,599,668		12,848,076		19,639,241
Diesel Oil		1,017,727		1,383,050		2,308,478
Gasoline		90,163		123,078		107,399
Other		140,065		132,162		177,138
Total		21,507,027		21,821,978		30,292,762

(1) Not comparable to subsequent years. See page 6.

Table 16

Expenditures on Fuel and Amount Consumed
by Canadian Marine Operators (By Divisions)

1946⁽¹⁾

	Coal (Tons)		Fuel Oil (Barrels) [‡]		Diesel Oil (Barrels) [‡]		Gasoline (Barrels) [‡]		Other Fuel		Total Cost
	Quantity	Cost	Quantity	Cost	Quantity	Cost	Quantity	Cost	Quantity	Cost	
<u>Incorporated Companies</u>		\$		\$		\$		\$		\$	\$
Atlantic Division	720,551	6,302,663	1,385,385	10,914,914	393,718	780,315	3,549	37,633	-	53,976	18,089,501
Pacific Division	29,642	336,707	1,402,504	2,648,325	53,651	179,602	2,389	18,783	-	76,050	3,259,467
Inland (including the Great Lakes) X											
Total Incorporated	750,193	6,639,370	2,787,889	13,563,239	447,369	959,917	5,938	56,416	-	130,026	21,348,968
<u>Individual Ownership & Partnership</u>											
Atlantic Division	2,349	19,892	8,671	27,946	9,325	36,908	2,815	25,097	-	8,508	118,351
Pacific Division	9	142	4,219	8,483	6,218	20,902	951	8,650	-	1,531	39,708
Inland (including the Great Lakes) X											
Total Individual, etc.	2,358	20,034	12,890	36,429	15,543	57,810	3,766	33,747	-	10,039	158,059
<u>All Operators</u>											
Total Atlantic Division	722,900	6,322,555	1,394,056	10,942,860	403,043	817,223	6,364	62,730	-	62,484	18,207,852
Total Pacific Division	29,651	336,849	1,406,723	2,656,808	59,869	200,504	3,340	27,433	-	77,581	3,299,175
Total Inland (including the Great Lakes) X											
Grand Total	752,551	6,659,404	2,800,779	13,599,668	462,912	1,017,727	9,704	90,163	-	140,065	21,507,027

‡ 35 Imperial Gallons.

(1) Not comparable to subsequent years. See page 6.

X Included with Atlantic Division.

Table 17

Expenditures on Fuel and Amount Consumed
by Canadian Marine Operators (By Divisions)

1 9 4 7

	Coal (Tons)		Fuel Oil (Barrels) ⁴		Diesel Oil (Barrels) ⁴		Gasoline (Barrels) ⁴		Other Fuel		Total Cost
	Quantity	Cost	Quantity	Cost	Quantity	Cost	Quantity	Cost	Quantity	Cost	
<u>Incorporated Companies</u>		\$		\$		\$		\$		\$	
Atlantic Division	486,305	4,718,772	3,845,661	9,721,049	163,030	511,724	786	7,103	-	17,746	14,976,394
Pacific Division	32,390	65,150	1,365,973	2,588,792	173,791	546,484	4,293	31,957	-	72,852	3,305,235
Inland (including the Great Lakes)	301,271	2,546,228	192,161	498,370	44,984	201,291	4,883	50,816	-	40,382	3,337,087
Total Incorporated	819,966	7,330,150	5,403,795	12,808,211	381,805	1,259,499	9,962	89,876	-	130,980	21,618,716
<u>Individual Ownership & Partnership</u>											
Atlantic Division	338	5,114	8,044	33,665	22,741	97,186	1,615	15,992	-	696	152,653
Pacific Division	3	48	3,527	5,921	6,270	25,726	1,299	10,929	-	-	42,624
Inland (including the Great Lakes)	20	300	64	279	1,204	639	591	6,281	-	486	7,985
Total Individual, etc.	361	5,462	11,635	39,865	30,215	123,551	3,505	33,202	-	1,182	203,262
<u>All Operators</u>											
Total Atlantic Division	486,643	4,723,886	3,853,705	9,754,714	185,771	608,910	2,401	23,095	-	18,442	15,129,047
Total Pacific Division	32,393	65,198	1,369,500	2,594,713	180,061	572,210	5,592	42,886	-	72,852	3,347,859
Total Inland (including the Great Lakes)	301,291	2,546,528	192,225	498,649	48,188	201,930	5,474	57,097	-	40,868	3,345,072
Grand Total	820,327	7,335,612	5,415,430	12,848,078	412,020	1,583,050	13,467	123,078	-	132,162	21,821,978

⁴ 35 Imperial Gallons.

Table 18

Expenditures on Fuel and Amount Consumed
by Canadian Marine Operators (By Divisions)

1948

	Coal (Tons)		Fuel Oil (Gallons)		Diesel Oil (Gallons)		Gasoline (Gallons)		Other Fuel		Total Cost
	Quantity	Cost	Quantity	Cost	Quantity	Cost	Quantity	Cost	Quantity	Cost	
<u>Incorporated Companies</u>		\$		\$		\$		\$		\$	\$
Atlantic Division	391,843	4,364,175	167,703,919	14,154,190	9,136,253	1,134,598	28,766	8,010	-	78,254	19,739,227
Pacific Division	11,523	165,184	53,436,258	4,623,938	5,814,990	735,681	107,519	26,302	-	85,593	5,636,698
Inland (including the Great Lakes)	344,305	3,526,801	7,148,604	806,134	2,011,846	312,011	133,492	42,594	-	12,417	4,699,957
Total Incorporated	747,671	8,056,160	228,288,781	19,584,262	16,963,089	2,182,290	269,777	76,906	-	176,264	30,075,882
<u>Individual Ownership & Partnership</u>											
Atlantic Division	43	813	296,469	41,291	415,916	91,086	61,554	17,078	-	-	150,268
Pacific Division	5	90	135,646	13,277	229,315	31,887	30,367	7,844	-	-	53,098
Inland (including the Great Lakes)	323	3,443	4,110	411	14,335	3,215	20,383	5,571	-	874	13,514
Total Individual, etc.	371	4,346	436,225	54,979	659,566	126,188	112,304	30,493	-	874	216,880
<u>All Operators</u>											
Total Atlantic Division	391,886	4,364,988	168,000,388	14,195,481	9,552,169	1,225,684	90,320	25,088	-	78,254	19,889,495
Total Pacific Division	11,528	165,274	53,571,904	4,637,215	6,044,305	767,568	137,886	34,146	-	85,593	5,689,796
Total Inland (including the Great Lakes)	344,628	3,530,244	7,152,714	806,545	2,026,181	315,226	153,875	48,165	-	13,291	4,713,471
Grand Total	748,042	8,080,506	228,725,006	19,639,241	17,622,655	2,308,478	382,081	107,399	-	177,138	30,292,762

PART V

Vessels--Owned or Chartered as at End of Season

Operators at the end of the 1948 season reported 1,782 vessels as owned or chartered as opposed to 1,738 for 1947. During the latter year, however, there were 1,656 in actual operation as compared to only 1,630 in 1948. The fewer vessels in service is indicative of the mounting difficulties encountered by the fleet operators in obtaining cargoes in the face of increased costs, lower world freight rates and keener competition.

The number of vessels as reported are those owned or chartered at the close of the season or on December 31st of the given year. Thus, ships chartered for certain periods throughout the year and released before the end of the year or season do not appear in the totals. The activities of companies in this regard are not omitted but appear as part of their operating expenses under the heading of "vessel rentals". For example, there were only 73 tankers reported at the end of the 1948 season as compared to 82 in 1947. Yet there was a considerable increase in gasoline and petroleum carriage in and to Canada from 1947 to 1948 representing both fuller utilization of the tankers on hand and the chartering of this type of vessel throughout 1948.

Tugs, tow barges and scows represented 29 per cent of the vessels reported in 1947 and 33 per cent in 1948. Freighters, on the other hand, represented 36 per cent of the total in 1947 and only 30 per cent of the smaller total for 1948, with the total number of freighters reduced from 615 to 530 at the close of 1948.

Table 19

Vessels Owned or Chartered as at End of Season
by Canadian Marine Operators (By Divisions)

1946 ⁽¹⁾

	Class of Vessel							Total in Operation	Total Laid up	Grand Total
	Passenger	Passenger and Freight	Freight	Tanker	Tugs	Tow Barges and Scows	Miscell- aneous Vessels			
	No.	No.	No.	No.	No.	No.	No.	No.	No.	No.
<u>Incorporated Companies</u>										
Atlantic Division	26	83	495	54	108	178	46	918	72	990
Pacific Division	15	25	53	3	150	207	15	458	10	468
Inland (including the Great Lakes) /										
Total Incorporated	41	108	548	57	258	385	61	1,376	82	1,458
<u>Individual Ownership & Partnership</u>										
Atlantic Division	18	15	64	4	13	17	16	143	4	147
Pacific Division	6	3	4	-	41	29	8	88	3	91
Inland (including the Great Lakes) /										
Total Individual, etc.	24	18	68	4	54	46	24	231	7	238
<u>All Operators</u>										
Total Atlantic Division	44	98	559	58	121	195	62	1,061	76	1,137
Total Pacific Division	21	28	57	3	191	236	23	546	13	559
Total Inland (including the Great Lakes) /										
Grand Total	65	126	616	61	312	431	85	1,607	89	1,696

/ Included with Atlantic Division.

(1) Not comparable to subsequent years. See page 6.

Table 20

Vessels Owned or Chartered as at End of Season
by Canadian Marine Operators (By Divisions)

1 9 4 7

	Class of Vessel							Total in Operation	Total Laid up	Grand Total
	Passenger	Passenger and Freight	Freight	Tanker	Tugs	Tow Barges and Scows	Miscell- aneous Vessels			
	No.	No.	No.	No.	No.	No.	No.	No.	No.	No.
<u>Incorporated Companies</u>										
Atlantic Division	15	46	400	73	54	54	14	615	41	656
Pacific Division	18	21	52	1	195	226	18	515	16	531
Inland (including the Great Lakes)	15	28	82	5	54	100	24	297	11	308
Total Incorporated	48	95	534	79	303	380	56	1,427	68	1,495
<u>Individual Ownership & Partnership</u>										
Atlantic Division	10	10	74	1	10	14	7	115	13	126
Pacific Division	7	6	4	1	33	39	4	94	-	94
Inland (including the Great Lakes)	6	-	3	1	6	5	2	22	1	23
Total Individual, etc.	23	16	81	3	49	58	13	229	14	243
<u>All Operators</u>										
Total Atlantic Division	25	56	474	74	64	68	21	728	54	782
Total Pacific Division	25	27	56	2	228	265	22	609	16	625
Total Inland (including the Great Lakes)	21	28	85	6	60	105	26	319	12	331
Grand Total	71	111	615	82	352	438	69	1,656	82	1,738

Table 21

Vessels Owned or Chartered as at End of Season
by Canadian Marine Operators (By Divisions)

1 9 4 8

	Class of Vessel							Total in Operation	Total Laid up	Grand Total
	Passenger	Passenger and Freight	Freight	Tanker	Tugs	Tow Barges and Scows	Miscell- aneous Vessels			
	No.	No.	No.	No.	No.	No.	No.	No.	No.	No.
<u>Incorporated Companies</u>										
Atlantic Division	15	48	328	64	74	47	20	542	54	596
Pacific Division	18	20	47	1	191	247	26	489	61	550
Inland (including the Great Lakes)	14	29	86	5	78	173	23	385	23	408
Total Incorporated	47	97	461	70	343	467	69	1,416	138	1,554
<u>Individual Ownership & Partnership</u>										
Atlantic Division	21	13	64	2	7	9	1	107	10	117
Pacific Division	2	2	2	-	37	29	5	76	1	77
Inland (including the Great Lakes)	7	3	3	1	9	9	2	31	3	34
Total Individual, etc.	30	18	69	3	53	47	8	214	14	228
<u>All Operators</u>										
Total Atlantic Division	36	61	392	66	81	56	21	649	64	713
Total Pacific Division	20	22	49	1	228	276	31	565	62	627
Total Inland (including the Great Lakes)	21	32	89	6	87	182	25	416	26	442
Grand Total	77	115	530	75	396	514	77	1,630	152	1,782

PART VI

Accidents

During 1948, there were 38 persons reported as killed and 2,166 injured as compared with 89 and 2,350, respectively, for 1947. The number reported as killed includes those lost at sea and presumed dead. In both years, death and injury occurred principally among vessel crews. In 1947, deaths among employees as a whole accounted for 93.3 per cent of the total reported, while in 1948 the percentage had risen to 100. Employee injuries during 1947 constituted 98.3 per cent of total injuries reported, and in 1948, 95.4 per cent.

The estimated value of vessel losses was considerably lower during 1948, amounting to \$438,296 as compared to \$1,437,138 in 1947. Numerically, however, there was only one less vessel lost in 1948 at 16. Vessels lost includes those lost at sea, burnt or otherwise destroyed.

Table 22

Number of Persons Killed or Injured in the Canadian
Water Transportation Industry (By Divisions)

1946 (1)

	Members of Crew		Other Employees		Passengers		Other Persons		T o t a l		Vessels Lost	
	Killed	Injured	Killed	Injured	Killed	Injured	Killed	Injured	Killed	Injured	No.	Value
<u>Incorporated Companies</u>												
Atlantic Division	18	1,382	-	63	-	31	1	2	19	1,478	5	58,113
Pacific Division	6	269	-	8	-	-	-	-	6	277	1	24,980
Inland (including the Great Lakes) /												
Total Incorporated	24	1,651	-	71	-	31	1	2	25	1,755	6	83,093
<u>Individual Ownership & Partnership</u>												
Atlantic Division	-	3	-	1	-	-	-	-	-	4	3	23,853
Pacific Division	-	1	-	1	1	-	-	-	1	2	1	11,000
Inland (including the Great Lakes) /												
Total Individual, etc.	-	4	-	2	1	-	-	-	1	6	4	34,853
<u>All Operators</u>												
Total Atlantic Division	18	1,385	-	64	-	31	1	2	19	1,482	8	81,966
Total Pacific Division	6	270	-	9	1	-	-	-	7	279	2	35,980
Total Inland (including the Great Lakes) /												
Grand Total	24	1,655	-	73	1	31	1	2	26	1,761	10	117,946

/ Included with Atlantic Division.

(1) Not comparable to subsequent years. See page 6.

Table 25

Number of Persons Killed or Injured in the Canadian
Water Transportation Industry (By Divisions)

1 9 4 7

	Members of Crew		Other Employees		Passengers		Other Persons		T o t a l		Vessels Lost	
	Killed	Injured	Killed	Injured	Killed	Injured	Killed	Injured	Killed	Injured	No.	Value
<u>Incorporated Companies</u>												\$
Atlantic Division	52	953	1	51	-	2	1	3	54	1,009	5	582,938
Pacific Division	11	483	-	41	5	7	-	1	16	532	4	203,000
Inland (including the Great Lakes)	14	404	3	373	-	23	-	4	17	804	5	648,500
Total Incorporated	77	1,840	4	465	5	32	1	8	87	2,345	14	1,434,438
<u>Individual Ownership & Partnership</u>												
Atlantic Division	1	2	-	-	-	-	-	-	1	2	2	1,700
Pacific Division	1	3	-	-	-	-	-	-	1	3	1	1,000
Inland (including the Great Lakes)	-	-	-	-	-	-	-	-	-	-	-	-
Total Individual, etc.	2	5	-	-	-	-	-	-	2	5	3	2,700
<u>All Operators</u>												
Total Atlantic Division	53	955	1	51	-	2	1	3	55	1,011	7	584,638
Total Pacific Division	12	486	-	41	5	7	-	1	17	535	5	204,000
Total Inland (including the Great Lakes)	14	404	3	373	-	23	-	4	17	804	5	648,500
Grand Total	79	1,845	4	465	5	32	1	8	89	2,350	17	1,437,138

Number of Persons Killed or Injured in the Canadian
Water Transportation Industry (By Divisions)

Table 24

1 9 4 8

	Members of Crew		Other Employees		Passengers		Other Persons		T o t a l		Vessels Lost	
	Killed	Injured	Killed	Injured	Killed	Injured	Killed	Injured	Killed	Injured	No.	Value
<u>Incorporated Companies</u>												
Atlantic Division	21	751	1	7	-	18	-	8	22	784	3	53,904
Pacific Division	9	428	-	26	-	-	-	7	9	461	7	187,403
Inland (including the Great Lakes)	6	475	1	368	-	65	-	2	7	910	3	93,570
Total Incorporated	36	1,654	2	401	-	83	-	17	38	2,155	13	334,877
<u>Individual Ownership & Partnership</u>												
Atlantic Division	-	3	-	-	-	-	-	-	-	3	2	101,919
Pacific Division	-	8	-	-	-	-	-	-	-	8	-	-
Inland (including the Great Lakes)	-	-	-	-	-	-	-	-	-	-	1	1,500
Total Individual, etc.	-	11	-	-	-	-	-	-	-	11	5	103,419
<u>All Operators</u>												
Total Atlantic Division	21	754	1	7	-	18	-	8	22	787	5	155,823
Total Pacific Division	9	436	-	26	-	-	-	7	9	469	7	187,403
Total Inland (including the Great Lakes)	6	475	1	368	-	65	-	2	7	910	4	95,070
Grand Total	36	1,665	2	401	-	83	-	17	38	2,166	16	438,296

(READ INSTRUCTIONS CAREFULLY BEFORE FILLING IN FORM)

DEPARTMENT OF
TRADE AND COMMERCE



WATER TRANSPORTATION REPORT

FOR 1948

TO

DOMINION BUREAU OF STATISTICS, OTTAWA
TRANSPORTATION DIVISION

This report should be completed and returned on or before March 31, 1949.

If this is not the correct
address please correct it

File No. WT

1. Kind of Business (a) Passenger (b) Passenger and Freight
 (c) Freight (d) Fishing
 (e) Pleasure
 (f) Other—State Kind.....
2. Type of ownership (a) Incorporated Company (b) Partnership
 (c) Individual Owner

I. Property Account:—

(Used in Water Transport business only)

Omit Cents

	A (1) Gross Additions Made During Year	B Total Value of Assets as at End of Year
	\$	\$
3. Land.....		
4. Vessels.....		
5. Docks—Wharves—Warehouses.....		
6. Other Buildings.....		
7. Supplies and Spare Equipment.....		
8. Other.....		
9. Total.....		
10. Less Depreciation: accrued to date.....	x x x	
11. Net Value.....	x x x	
12. Cost of second-hand materials, old vessels, building, etc. purchased during year and included in Column A, item 9.....		

II. Revenue:—

13. Passenger.....	
14. Freight, automobiles, other vehicles.....	
15. Towing.....	
16. Salvage.....	
17. Storage.....	
18. Charters.....	
19. Subsidies—Mail or other.....	
20. Other.....	
Total.....	

III. Expenses:—

21. Maintenance (exclusive of Depreciation).....	
22. Operation.....	
23. Advertising—Solicitation of Traffic.....	
24. Insurance.....	
25. Administration and General.....	
26. Depreciation charged for year.....	
27. Taxes (exclusive of Income Tax).....	
28. Rentals for Vessels, Buildings, etc.....	
29. Total.....	
30. Interest paid on Bonds, Loans, etc. (Do not include capital payments).....	
31. Income — Credits (2).....	
32. Other Income Debits (2).....	
33. Net Income before Income Tax.....	
34. Provision for Income Tax.....	
35. Profit or Loss for Year.....	

(1) See Instruction No. 1.

(2) List large items below.

REMARKS:—

IV. Employees:—

	Number (Monthly Average)	Total Salaries and Wages paid during Year
36. Vessel Crews.....		\$.....
37. Dock and Warehouse Employees.....		\$.....
38. Office and Administration Employees.....		\$.....
39. Other Employees.....		\$.....
40. Total.....		\$.....
41. Withdrawals by Owners (exclude from above Total).....	x x x x	\$.....
42. Value of Meals supplied free to Employees.....	x x x x	\$.....
43. Per cent of item 40 paid to employees with home address in Canada.....		%.....

V. Fuel Consumed:—

	Quantity	Cost
44. Coal..... Tons		\$.....
45. Fuel Oil..... (Imp. Gallons)		\$.....
46. Diesel Oil..... (")		\$.....
47. Gasoline..... (")		\$.....
48. Other (State kind)		\$.....
49. Total.....	x x x x	\$.....

VI. Vessels—Owned or Chartered as at End of Season:—

Termini of Routes or Locality Served	Class of Vessel						
	Passenger	Passenger and Freight	Freight	Tanker	Tugs	Tow Barges and Scows	Miscellaneous Vessels
50.							
51.							
52.							
53.							
54.							
55.							
56.							
57.							
58. Total in Operation.....							
59. Vessels not operated during season.....							

VII. Accidents:—

	Number of Persons	
	Killed	Injured
60. Members of Crews.....		
61. Other Employees.....		
62. Passengers.....		
63. Other Persons.....		
64. Total.....		
65. Number and Value of Vessels lost.....	No.....	Value \$.....

REMARKS:—

Signature.....

Date of Report..... 1949.

Title.....

INSTRUCTIONS

The information in this report is required under the Statistics Act. The data will not be used for taxation purposes and should be for the calendar year.

Item 1. Put a check (✓) after the appropriate heading and if "other" state the kind of business, such as Towing, Salvage, etc.

If you sold your vessel or vessels during the year fill in the data for the part of the year you operated and under "REMARKS" show the date of sale and name and address of the purchaser.

If your vessel was used solely for fishing put a check (✓) after (d) and return the form. Answers to the other items are not required from fishermen.

Item 2. Put a check (✓) after the appropriate heading.

SECTION I.

Enter for items 3 to 9 inclusive, the values carried in your books (for land, buildings, vessels, etc., used in your Water Transport business only) before depreciation has been deducted. If values are not known please make estimates.

In column "A" show the gross expenditures made during the year. Salvage and other credits, however, should be deducted in column "B".

Item 10 should be the total accrued depreciation to the end of the year.

SECTION II

All revenue earned during the year should be shown opposite the appropriate item. If the vessels are operated in conjunction with any business for which a report is made to the Bureau, enter the revenue for such business opposite item 20 "other" and state under "REMARKS" the nature of the business and the name of the report. Revenues from sales of gasoline, stores, etc., should be entered as 20 "other" and covered by a footnote.

Uncompleted Voyages:—

Where expenses include items for uncompleted voyages, the revenues should include revenue items for such voyages, either actual or estimates. Gross figures should be shown for both the revenue and expenses and not net profits or losses.

SECTION III.

The expenses should include all operating expenses, salaries and wages, meals supplied, and income credits and debits, but should not include any capital items such as payments for vessels, new equipment or facilities nor repayment of loans.

Do not include as expenses, withdrawals by owners. These should be reported opposite item 41.

SECTION IV.

The number of employees should be the total average of the monthly counts and the salaries and wages should be the total paid during the year to each class before income deductions and other similar deductions have been made. Also the wages should not include any allowances for meals if such allowances are reported in item 42. If the value of meals supplied free for item 42 is not recorded, please make as close an estimate as possible.

SECTION V.

Fuel consumed should include all fuel consumed by vessels; also by dock cranes, etc. Do not include grease and lubricating oil.

SECTION VI.

Show the number of vessels of each class in service during the year or season on each route or in each locality such as Seattle-Vancouver; Upper Lakes; Toronto-Montreal; Lower St. Lawrence; Halifax-West Indies, etc.

Motor boats should be entered under Passenger or Freight, etc., according to service.

For item 59 show the number of vessels which were not operated for all or for most of the season, including vessels waiting to be broken up.

SECTION VII.

Include all employees killed or injured while on duty or on the company's vessels or property, and all passengers and other persons killed or injured in accidents in which the company's vessels or property were involved.

For item 65 include all vessels lost at sea, burnt or otherwise destroyed and the approximate value of such.

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