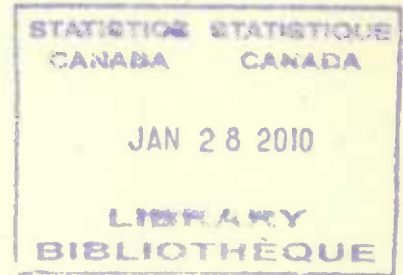


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Government of Canada



SURVEY OF PRODUCTION

IN

CANADA

1947





DOMINION BUREAU OF STATISTICS
DEPARTMENT OF TRADE AND COMMERCE

SURVEY OF PRODUCTION
IN
CANADA
1947

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SURVEY OF PRODUCTION AND RELATED FACTORS

The value of commodity production in Canada during 1947 was the highest ever attained in the history of the country. Contributing factors were the higher price levels, the post-war release of accumulated demand for consumers' goods here and abroad, record investment in housing, plant and equipment and marked improvement in the labour situation and the availability of raw materials.

The gross value of production at \$15.1 billion, was 23.4 per cent greater than in the preceding year when it stood at \$12.2 billion and 184 per cent higher than in 1938. The year 1945, when production dropped following the end of war requirements, was the only exception since 1938 in a continuous series of increases.

It is estimated that a further expansion of production in all industries was **achieved in 1948**. The physical volume of industrial production rose from 175.5 in 1947 to 181.5 and the general index of wholesale prices advanced nearly 19 per cent in the same comparison, an almost identical gain to that which occurred from 1946 to 1947. In addition, a rise of eight per cent over 1947 in the index of the physical volume of agricultural production combined with higher prices for Canadian farm products indicate a further increase in the value of the agriculture industry in 1948. Continued high activity in construction and electric power development was also noted.

Net Production.

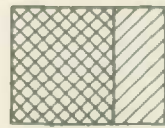
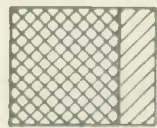
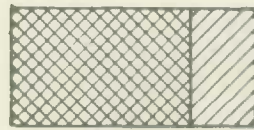
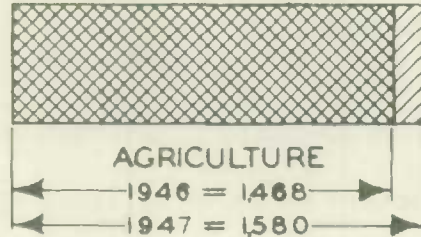
As for most purposes the net value of production is more significant than the gross, the subsequent analysis is based mainly on that phase of the subject. The cost of materials, fuel and electricity is deducted from the gross value of goods produced, resulting in the net production or value added by the productive process.

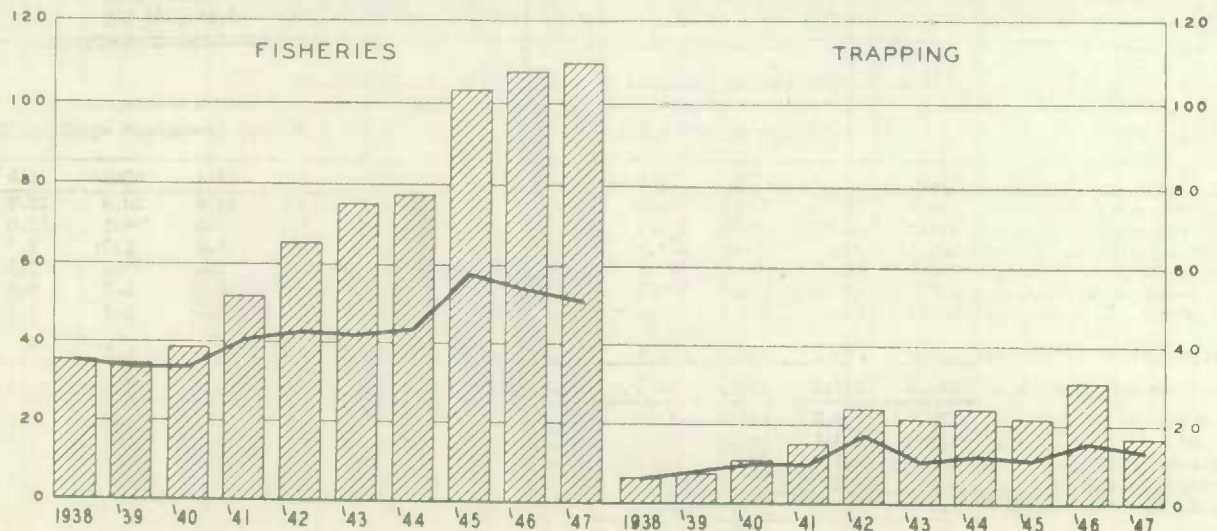
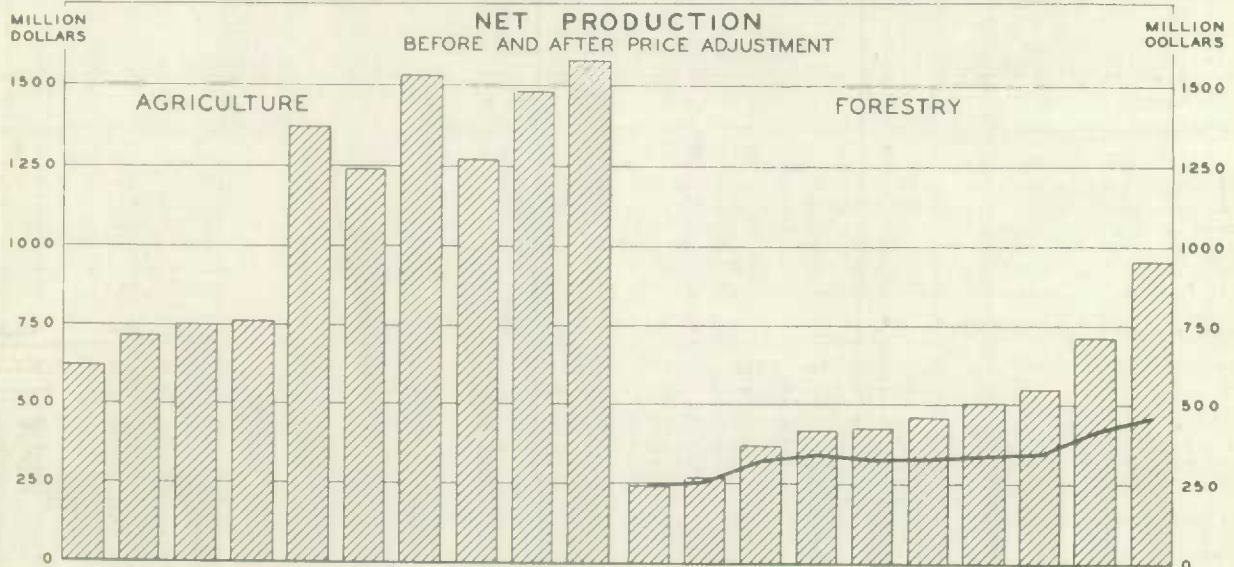
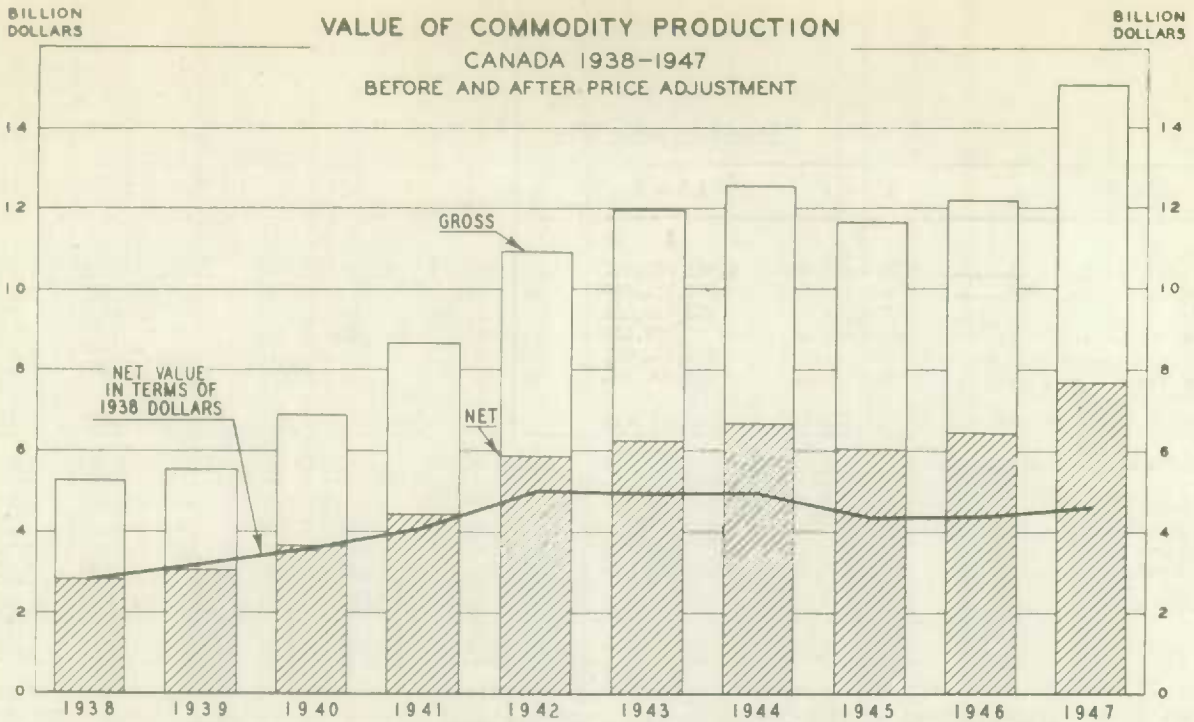
Net production was valued at a record \$7,765 million in 1947 against \$6,458 million in 1946. This marked gain was due largely to the rapid advance in prices during the period, although physical output also increased, as evidenced by a rise of

CHART I

NET VALUE OF PRODUCTION BY INDUSTRIAL GROUPS

1946 AND 1947
MILLION DOLLARS





SURVEY OF PRODUCTION IN CANADA, 1942 TO 1947

CANADA

Table 4. - Net Value of Manufactures Production by Groups, 1942-1947

| Industrial Group | 1942 | 1943 | 1944 | 1945 | 1946 | 1947 |
|----------------------------------|---------------|---------------|---------------|---------------|---------------|---------------|
| | \$ | \$ | \$ | \$ | \$ | \$ |
| Vegetable Products | 396,956,313 | 410,340,183 | 485,551,491 | 529,112,219 | 575,963,454 | 654,939,477 |
| Animal Products | 203,152,956 | 211,149,715 | 246,064,720 | 261,069,677 | 271,279,430 | 316,673,669 |
| Textiles and Textile Products .. | 341,475,081 | 334,242,717 | 351,186,488 | 367,980,705 | 418,263,665 | 488,983,044 |
| Wood and Paper Products | 488,433,355 | 508,835,982 | 550,826,986 | 586,057,023 | 749,055,011 | 991,750,398 |
| Iron and Its Products | 1,084,424,334 | 1,396,768,112 | 1,390,703,087 | 1,046,097,484 | 735,459,371 | 939,220,774 |
| Non-ferrous Metal Products | 355,005,408 | 369,005,912 | 399,498,519 | 316,572,975 | 278,461,262 | 402,021,896 |
| Non-metallic Mineral Products .. | 141,216,996 | 146,460,170 | 152,525,053 | 145,197,043 | 173,638,196 | 199,351,736 |
| Chemicals and Allied Products .. | 252,390,766 | 379,453,873 | 355,260,598 | 249,701,603 | 203,639,442 | 228,786,192 |
| Miscellaneous Industries | 46,918,549 | 60,156,877 | 84,159,068 | 62,527,170 | 61,245,149 | 70,328,616 |
| Total | 3,309,973,758 | 3,816,413,541 | 4,015,776,010 | 3,564,315,899 | 3,467,004,980 | 4,292,055,802 |

Table 5. - Percentage Analysis of Net Value of Manufactures, Totals for 1938 equalling 100

| Industrial Group | 1942 | 1943 | 1944 | 1945 | 1946 | 1947 |
|----------------------------------|-------|-------|-------|-------|-------|-------|
| Vegetable Products | 148.4 | 153.4 | 181.5 | 197.8 | 215.3 | 244.9 |
| Animal Products | 170.8 | 177.5 | 206.9 | 219.5 | 228.1 | 266.2 |
| Textiles and Textile Products .. | 213.5 | 208.9 | 219.5 | 230.0 | 261.4 | 305.7 |
| Wood and Paper Products | 176.3 | 183.7 | 198.9 | 211.6 | 270.4 | 358.0 |
| Iron and Its Products | 414.5 | 533.9 | 531.5 | 399.8 | 281.1 | 359.0 |
| Non-ferrous Metal Products | 215.6 | 224.1 | 242.6 | 192.2 | 169.1 | 244.1 |
| Non-metallic Mineral Products .. | 188.4 | 195.4 | 203.5 | 193.7 | 231.6 | 265.9 |
| Chemicals and Allied Products .. | 313.5 | 471.3 | 441.3 | 310.2 | 252.9 | 284.2 |
| Miscellaneous Industries | 203.3 | 260.7 | 364.7 | 270.9 | 265.4 | 304.7 |
| Total | 231.7 | 267.2 | 281.2 | 249.6 | 242.7 | 300.5 |

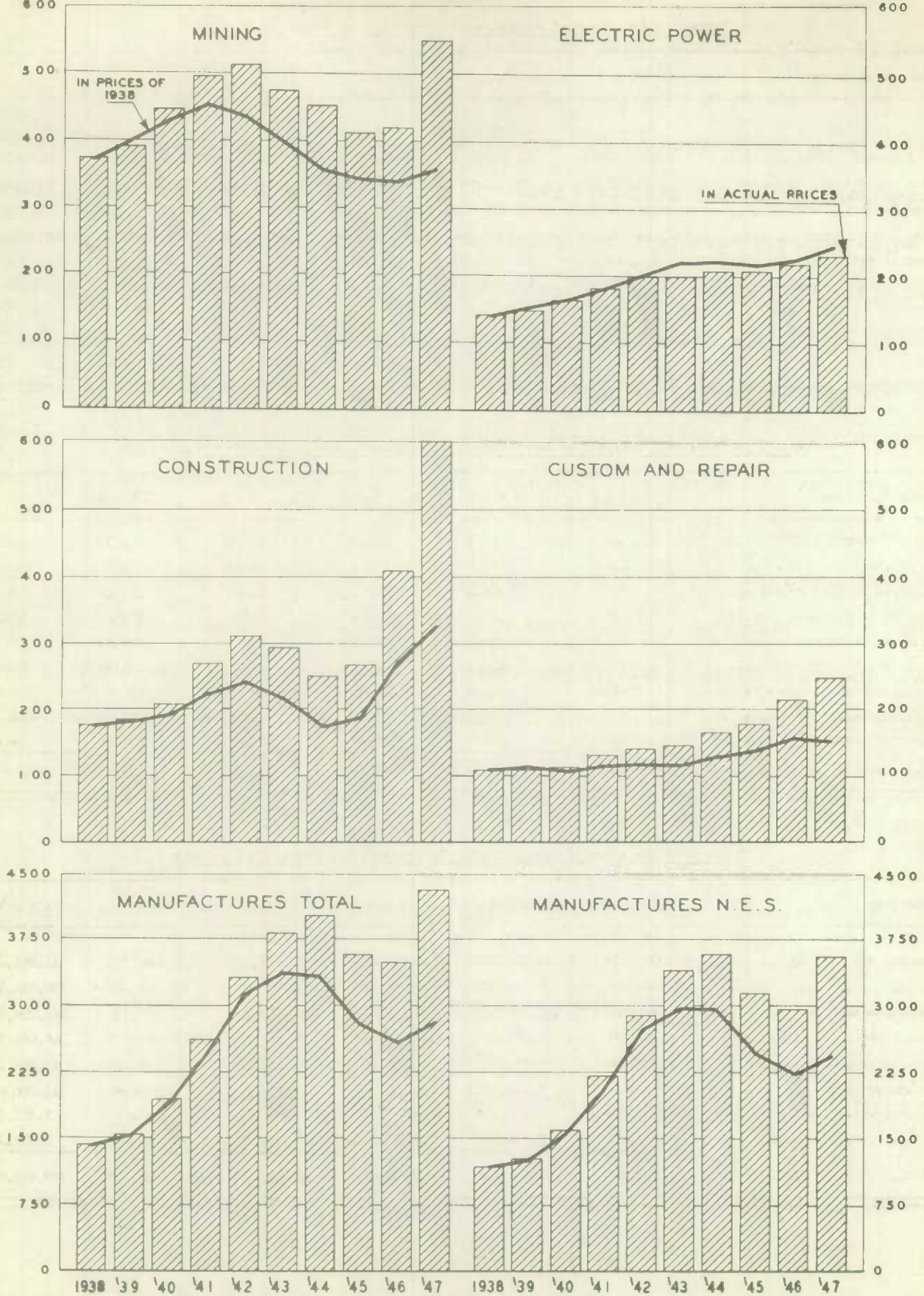
Table 6. - Net Value of Production in the Processing Industries in Dollars

| Industry | 1942 | 1943 | 1944 | 1945 | 1946 | 1947 |
|----------------------------------|-------------|-------------|-------------|-------------|-------------|-------------|
| | \$ | \$ | \$ | \$ | \$ | \$ |
| Fish curing and Packing | 20,969,913 | 20,588,039 | 22,066,801 | 30,529,102 | 31,084,775 | 41,081,688 |
| Sawmilling | 91,206,949 | 91,714,000 | 96,528,955 | 103,153,766 | 129,408,392 | 190,514,978 |
| Non-ferrous Metal Smelting | 125,881,047 | 111,857,020 | 123,303,038 | 89,898,878 | 69,565,922 | 115,798,652 |
| Pulp and Paper | 165,193,627 | 165,485,944 | 174,492,103 | 180,401,885 | 258,164,578 | 356,084,900 |
| Cement | 10,213,916 | 7,152,763 | 6,882,354 | 9,416,426 | 12,930,058 | 13,449,437 |
| Clay Products | 5,630,484 | 5,346,386 | 5,478,923 | 6,938,409 | 9,563,690 | 11,266,933 |
| Lime | 3,932,279 | 4,908,510 | 5,005,235 | 4,663,859 | 4,910,127 | 5,763,244 |
| Salt | 3,173,755 | 3,648,854 | 3,287,660 | 3,241,456 | 2,890,423 | 3,493,193 |
| Total | 426,201,970 | 410,701,516 | 437,045,069 | 428,243,781 | 518,517,965 | 737,453,025 |

CHART 3
MILLION
DOLLARS
600

NET PRODUCTION CANADA 1938-1947 BEFORE AND AFTER PRICE ADJUSTMENT

MILLION
DOLLARS
600



SURVEY OF PRODUCTION AND RELATED FACTORS

about 10 per cent in the index of industrial production.

Each of the nine industrial groups except trapping reached an all-time high in 1947. Among the six primary industries, the principal component, agriculture, showed an increase of 7.6 per cent over 1946. Higher prices for farm products and increases in adjustment and equalization payments counter-balanced lower volume in some of the main divisions, notably field crops, and accounted for this gain, which resulted in an even greater net value than in 1944, the previous high point.

The unprecedented building activity and record production of newsprint and other paper products combined with higher prices to record an impressive gain over 1946 of 34.2 per cent in the value of forestry. This industry has shown an unbroken record of advances since 1938.

Despite a decline in volume, higher prices resulted in a slight gain of 2 per cent for the fisheries industry when compared with 1946. After a steep advance in 1945, the value of the industry has remained relatively stable. The sharp drop of nearly 46 per cent in the net value of trapping was mainly caused by considerably lower prices for practically all kinds of fur in 1947. This has resulted in a six-year low for the industry.

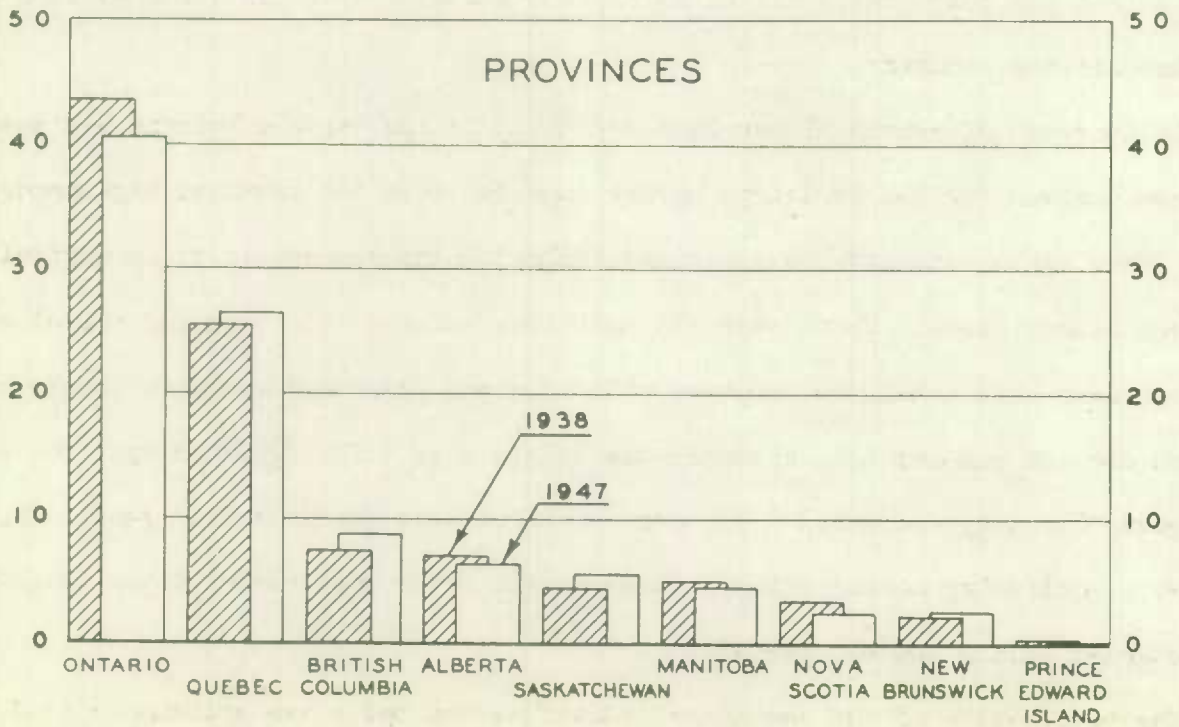
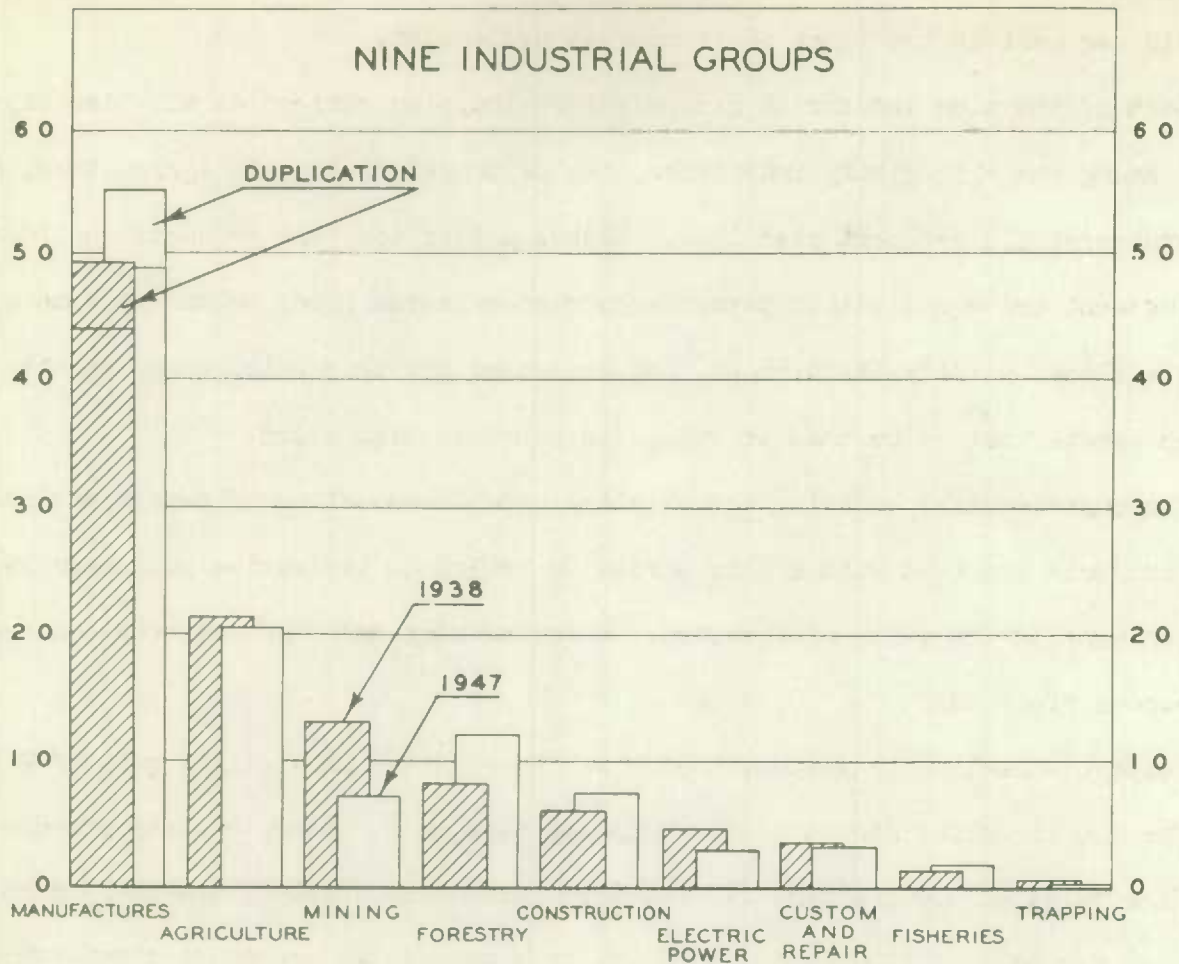
An increase of nearly 31 per cent over 1946 in the value of mining has established a new maximum for the industry, having exceeded even the previous high recorded in 1942. Here again, the advance in prices following the removal of price controls was the predominant cause. There were, in addition, gains in the physical output of gold and some base metals as compared with 1946 and important advances in the volume of iron ore and non-metallic minerals due to the high building activity. The electric power industry increased 6 per cent in value over the preceding year. This indicates a continuing acceleration in development after the growth of the industry was retarded during the war period.

The total value of the secondary industries reached a new maximum in 1947. The

PER CENT
OF TOTAL
NET PRODUCTION

RELATIVE IMPORTANCE
1938 AND 1947

PER CENT
OF TOTAL
NET PRODUCTION



SURVEY OF PRODUCTION AND RELATED FACTORS

increase over 1946 was 25.7 per cent. The most outstanding gain recorded was in construction, the net value of which rose more than 47 per cent over the preceding year to a total of \$602 million. Increased building activity and record prices for construction materials contributed to this marked advance. Custom and repair continued its upward trend with a gain of nearly 16 per cent over 1946.

Total manufactures surpassed even the wartime peak in 1944 to reach its highest net value in history, having advanced 23.8 per cent over the preceding year to a record \$4,292 million. As in the case of most other industries, higher prices and increased physical output contributed to this sharp increase. All groups within the industry showed gains over 1946, those in which war products were of lesser importance having recorded historical maxima in 1947. Non-ferrous metal products showed the greatest percentage increase over the preceding year with a gain of 44.4 per cent. Wood and paper products and iron and its products followed in this comparison with advances of 32.4 per cent and 27.7 per cent respectively. The chemicals group showed the smallest gain.

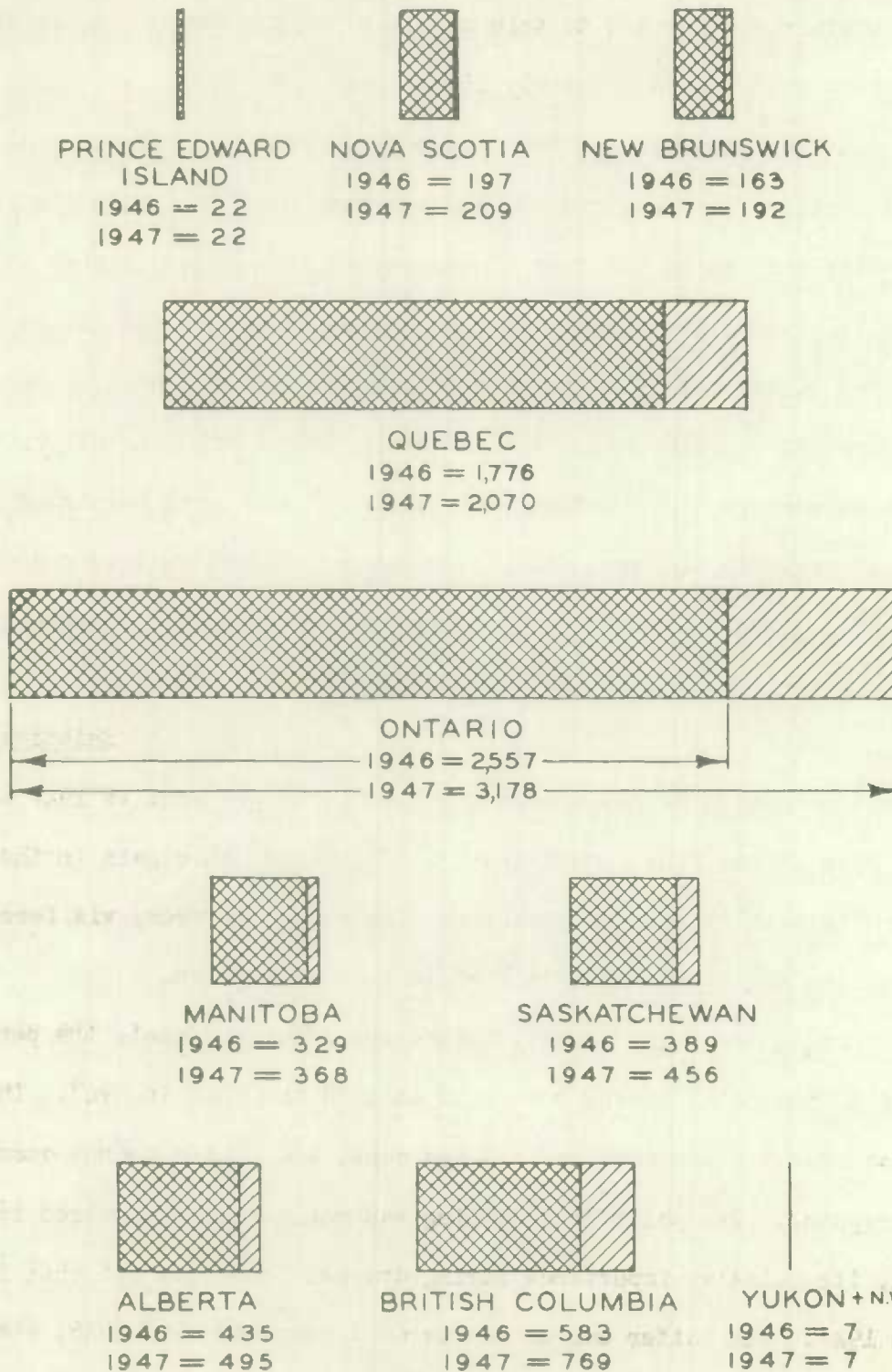
Relative Importance.

The total net value of production advanced 171.6 per cent in 1947 when compared with 1938. Five of the nine industries failed to equal this gain in the aggregate and therefore lost in relative importance. The remaining four, viz. forestry, fisheries, construction and manufactures gained in this connection.

The advance in the value of agriculture was 156.6 per cent, the percentage of the industry to the total having been 21.5 in 1938 and 20.4 in 1947. The share of forestry rose from 8.6 per cent to 12.3 per cent, and little change occurred in fisheries and trapping. The position of mining was considerably impaired in the ten-year period, its relative importance having dropped from 13.1 per cent in 1938 to 7.1 per cent in 1947. The latter was an improvement compared with 1946, when the industry reached its lowest position in the period under review. Electric power also lost

PROVINCIAL DISTRIBUTION OF NET VALUE OF PRODUCTION

1946 AND 1947
MILLION DOLLARS



SURVEY OF PRODUCTION AND RELATED FACTORS

ground in this comparison, development having failed to keep pace with the aggregate during the war and early post-war periods.

Due to increased building activity, the rating of construction reached its highest point in the ten-year period, having advanced from 6.2 per cent to 7.7 per cent in the latest year. Custom and repair receded in the same comparison while total manufactures advanced its position to 55.3 per cent of the total in 1947 compared with 50 per cent in 1938. Largely as a result of declines in the rating of mining and electric power, the primary industries produced a lesser share of Canada's commodity production in 1947 than in 1938. The secondary group, inclusive of duplication, improved its position, the standing having been 66.2 per cent in 1947 compared with 60 per cent in 1938.

Provincial Distribution.

Only two provinces failed to establish all-time highs in value of production in 1947. Prince Edward Island receded slightly from its 1946 peak of \$22.1 million and predominantly-agricultural Saskatchewan, despite a rise of 17.4 per cent over 1946, failed to better its record of \$529 million established in 1944.

The increase in net production in Quebec over the preceding year was 16.6 per cent; as the gain in the Canadian total was 20.3 per cent, the relative importance of this province was less in 1947 than in the preceding year. Ontario, with a gain of 24.3 per cent in the year under review, gained ground in this comparison. Despite advances in Nova Scotia and New Brunswick of 5.9 per cent and 17.7 per cent respectively, these two Maritime Provinces, together with Prince Edward Island lost in relative importance.

The three Prairie Provinces also suffered in this connection. Manitoba and Alberta, although having recorded gains over 1946 to establish new maxima, failed to approach the advance in the Canadian total.

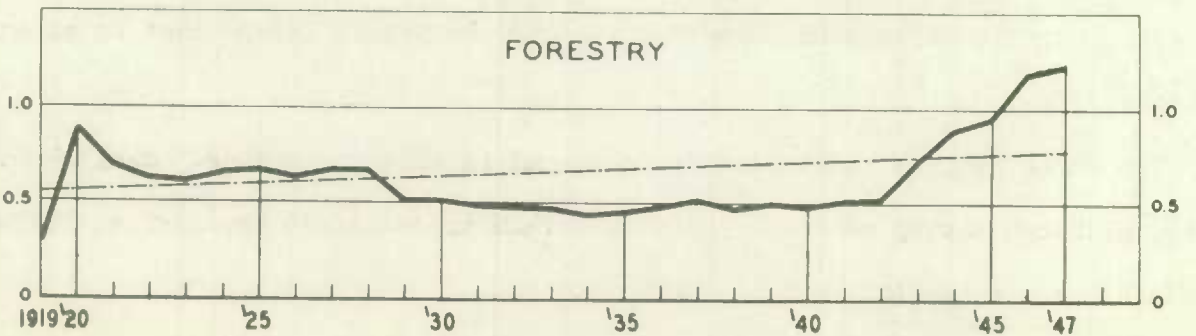
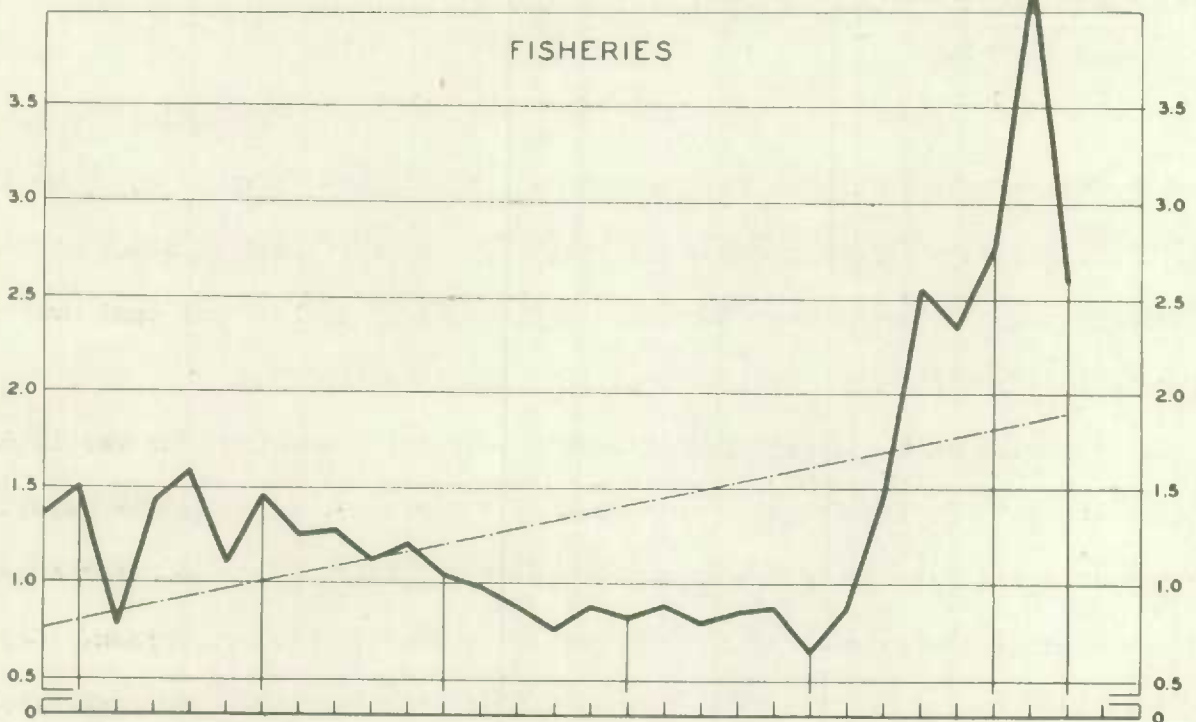
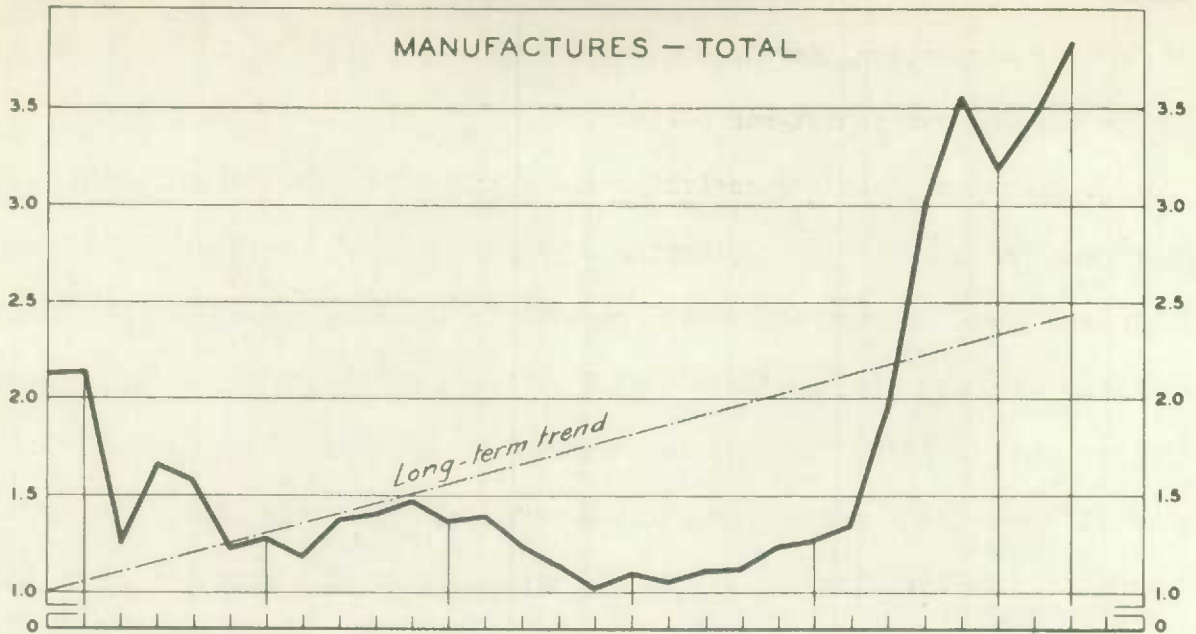
The only other province to gain in relative importance in 1947 besides Ontario

CHART 6.

NET VALUE OF PRODUCTION IN LEADING INDUSTRIES EXCLUDING AGRICULTURE PRINCE EDWARD ISLAND

MILLION
DOLLARS

MILLION
DOLLARS



SURVEY OF PRODUCTION AND RELATED FACTORS

was British Columbia which also recorded the largest percentage increase over 1946, having gained 32 per cent to establish a new record of \$769 million.

In comparison with the last full year of the pre-war period, four of the nine provinces, *vis.* New Brunswick, Quebec, Saskatchewan and British Columbia advanced in relative importance in 1947. Ontario, which accounted for 44 per cent of the total value of production in 1938 lost ground in the year under review when it contributed 41 per cent. All provinces maintained their relative positions in this comparison, except Manitoba and Saskatchewan. The latter was in sixth place in the pre-war year and fifth in 1947, displacing Manitoba in this position.

Per Capita Production.

The Dominion total of net production per capita in 1947 recorded a new maximum of \$617 which surpassed the previous 1944 record of \$563 by nearly 10 per cent.

Due to its pre-eminent position in industrial development, Ontario at \$759 was the leader on a per capita basis. With a per capita return of \$737, British Columbia was in second place in 1947. The same order existed in 1938 but Saskatchewan displaced the Pacific province in 1944. The per capita production of Alberta at \$602 was in third place in 1947, the same as in the pre-war year. It had dropped to fifth place in 1944.

Quebec has maintained the fourth position. The per capita production of Saskatchewan varied greatly from time to time, depending on the farm output. The standing was fifth in 1947 compared with second in 1944 and eighth in 1938. The production per person in Manitoba at \$495 was sixth in 1947. The province moved down one place from 1938 but held the same order as in 1944.

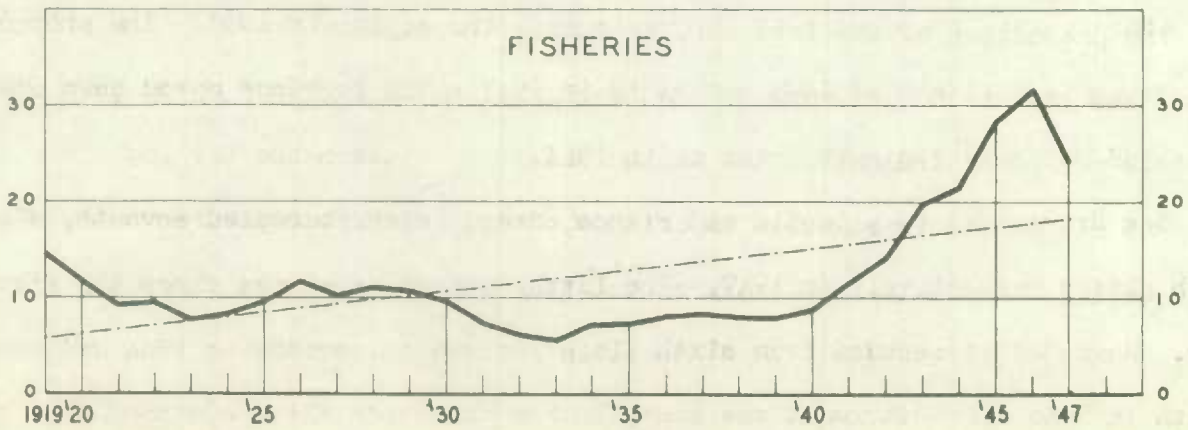
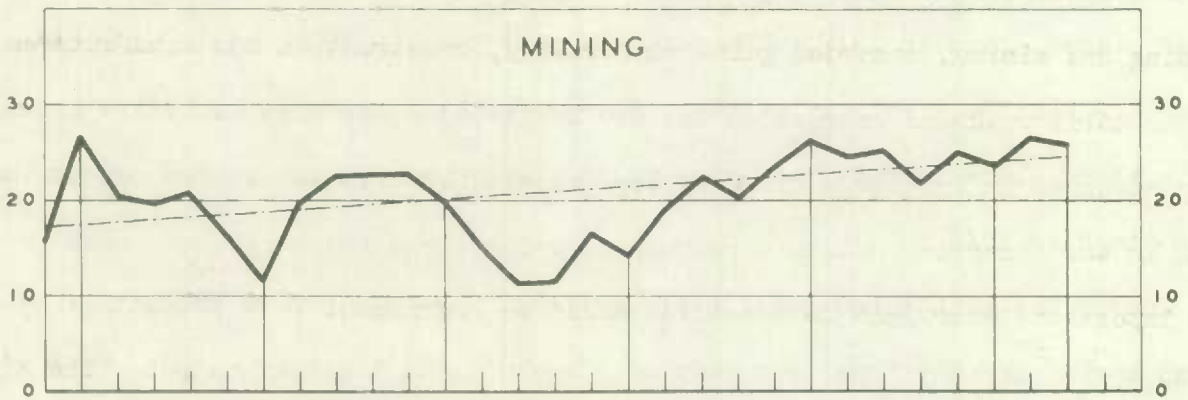
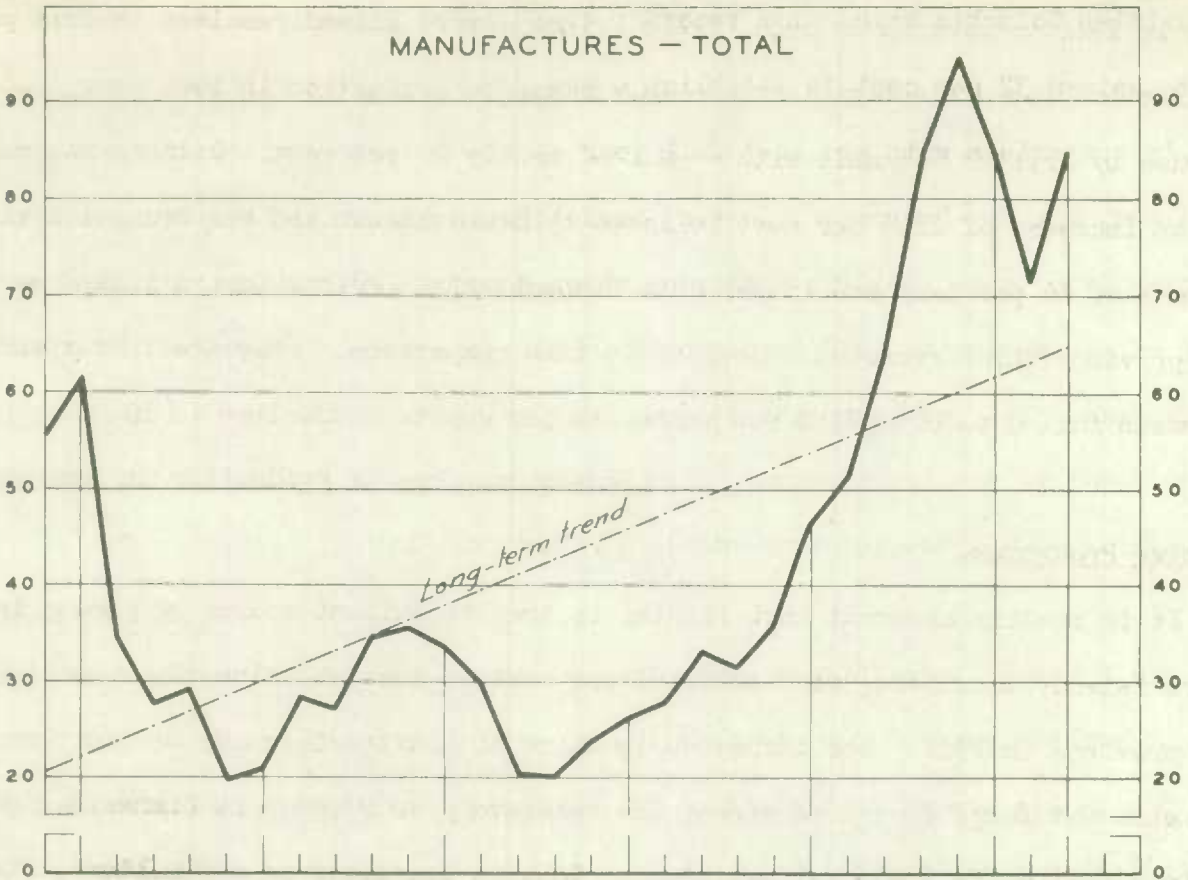
New Brunswick, Nova Scotia and Prince Edward Island occupied seventh, eighth and ninth places respectively in 1947. The latter showed no change since the pre-war year. Nova Scotia receded from sixth place in 1938 to seventh in 1944 and further to eighth in 1946. A betterment was shown in New Brunswick which advanced from eighth

CHART 7.

NET VALUE OF PRODUCTION
IN LEADING INDUSTRIES EXCLUDING AGRICULTURE
NOVA SCOTIA

MILLION DOLLARS

MILLION DOLLARS



SURVEY OF PRODUCTION AND RELATED FACTORS

place in 1944 to seventh in 1946, while Prince Edward Island remained in last place.

The largest percentage increase in per capita production in 1947 over 1946 was recorded by British Columbia with a gain of nearly 27 per cent. Ontario was next with an increase of 21.6 per cent followed by Saskatchewan and New Brunswick with advances of 16 per cent and 15 per cent respectively. Prince Edward Island was the only province which recorded a decline in this comparison. Only the latter and Saskatchewan failed to establish new maxima in per capita production in 1947.

Leading Branches of Production in Each Province.

Maritime Provinces.

It is readily apparent that farming is the predominant source of income in Prince Edward Island, accounting for nearly 61 per cent of the net value of production for that province in 1947. The increases in value of construction and manufactures over 1946 were not large enough to offset the relatively sharp drop in fisheries, resulting in a decline in the total net value. Despite decreases in agriculture, fisheries, trapping and mining, recorded gains in forestry, construction and manufactures advanced the total value of production in Nova Scotia to a new high in 1947. Similarly, sharp advances in forestry, construction and manufactures produced a new maximum net value in New Brunswick. As a consequence, these three industries advanced in relative importance over 1946 in the three Maritime Provinces.

Quebec.

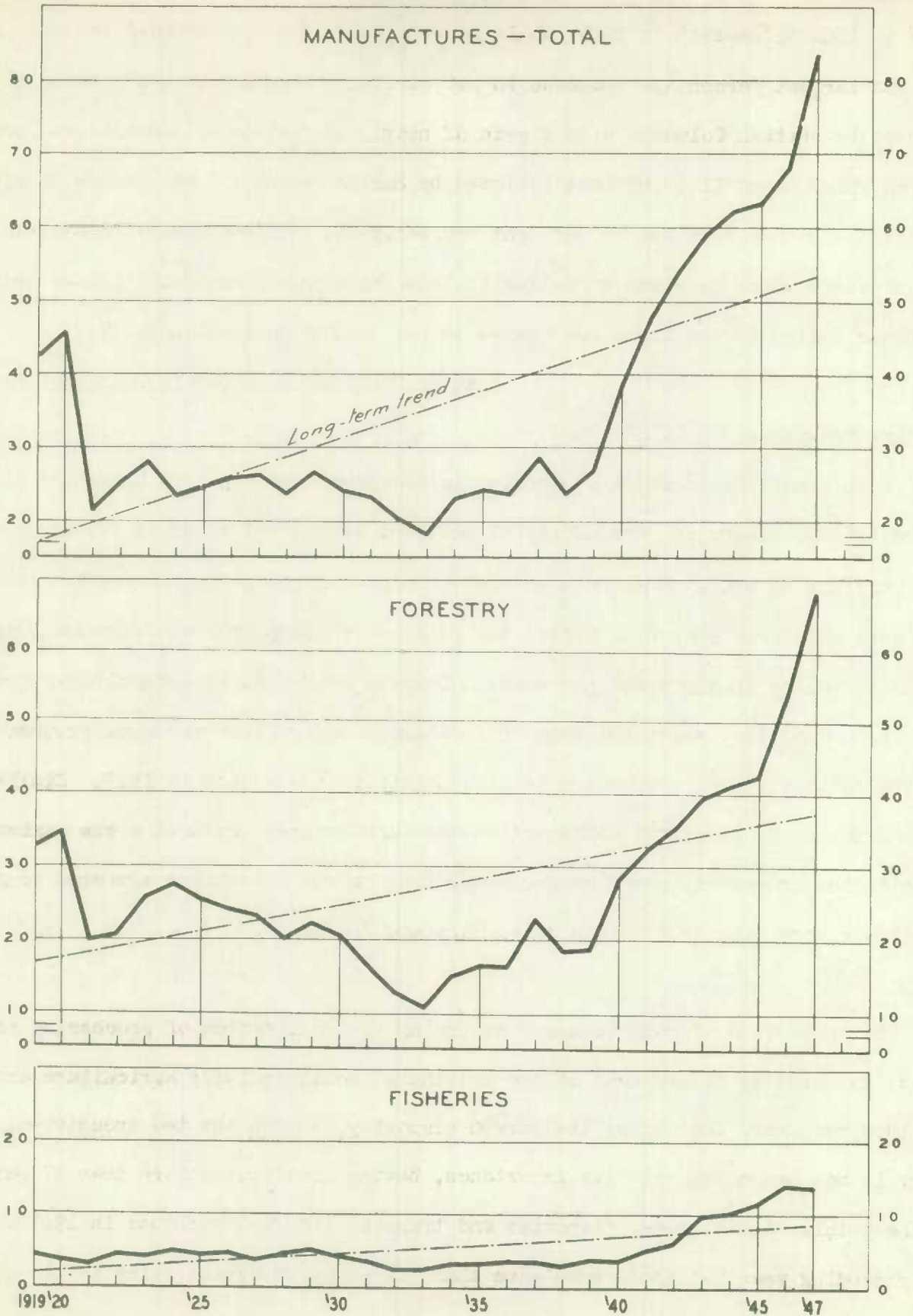
The production of manufactures, excluding the duplication of processing industries, amounted to 52 per cent of the provincial total in 1947; agriculture accounted for 10.9 per cent, indicating the marked disparity between the two industries. Forestry is now second in relative importance, having contributed more than 17 per cent of the total. Agriculture, fisheries and trapping recorded declines in 1947 from the preceding year but these were more than offset by important gains in the other industries.

CHART 8.

NET VALUE OF PRODUCTION
IN LEADING INDUSTRIES EXCLUDING AGRICULTURE
NEW BRUNSWICK

MILLION
DOLLARS

MILLION
DOLLARS



SURVEY OF PRODUCTION AND RELATED FACTORS

Ontario.

The outstanding position of this province in the field of manufacturing is readily evident. The share of manufactures, excluding processing industries was 61 per cent of the total in 1947. All industries recorded advances over 1946 except fisheries and trapping which are also the least in relative importance. Construction gained by nearly 50 per cent, followed by forestry and mining which showed increases of 33.6 per cent and 32 per cent respectively over 1946. Total manufactures rose 28.7 per cent.

Prairie Provinces.

All industries except trapping and fisheries showed increases over 1946 in each of the three Prairie Provinces. The relative importance of agriculture was 41.5 per cent, 74.6 per cent and 58.1 per cent respectively in Manitoba, Saskatchewan and Alberta. The dominant position of this industry in Saskatchewan accounts for the marked fluctuations in output of the province. In all three provinces, manufactures was second in importance, the total for Manitoba having been the highest. As a result of important discoveries of oil in Alberta, the mining industry of that province should assume greater relative importance in subsequent years.

British Columbia.

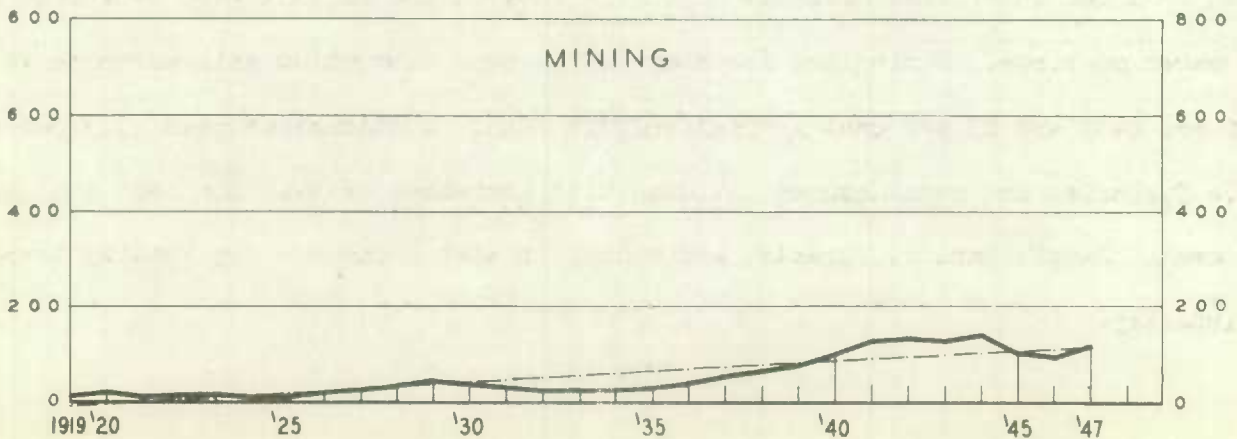
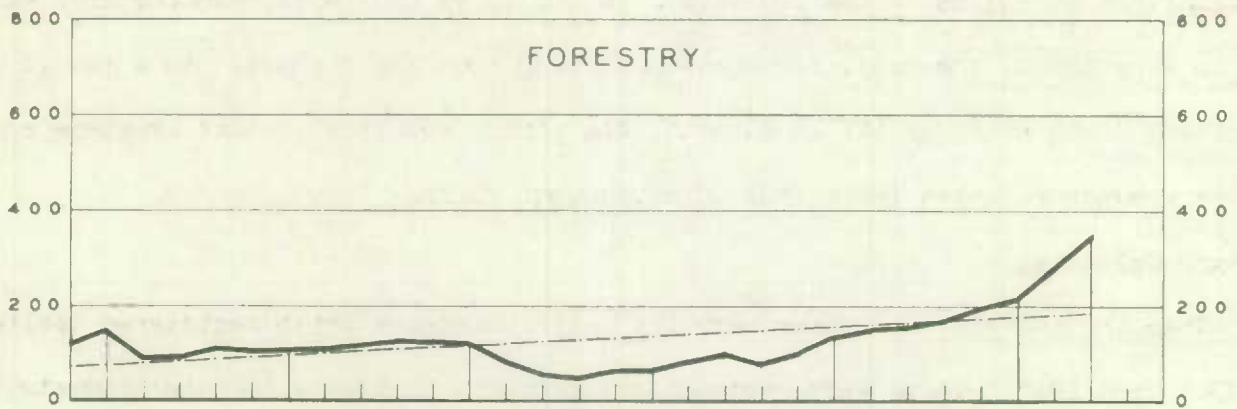
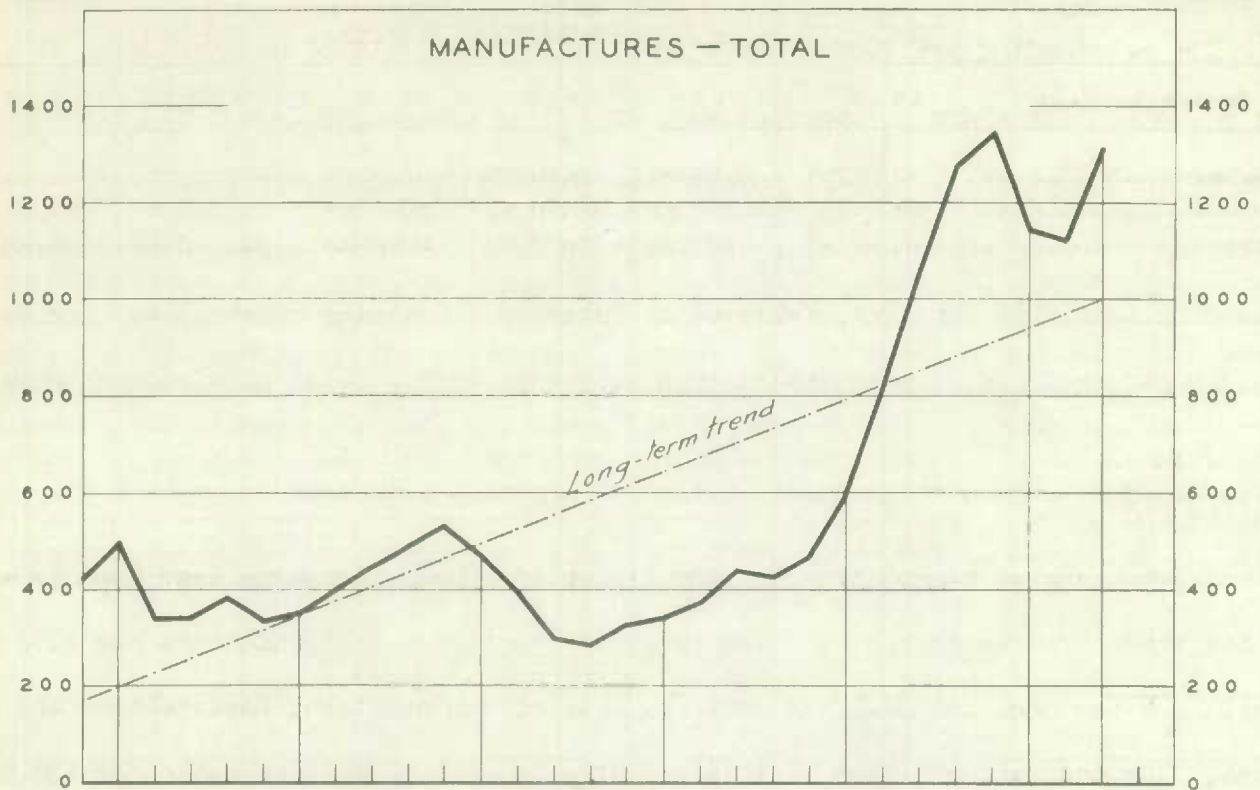
Trapping and electric power were the only industries which registered declines in 1947 from 1946. These were overshadowed by sharp increases in other industries which resulted in British Columbia having registered the largest gain over 1946 of any other province. Mining and forestry led in this connection with advances of 66.8 per cent and 63 per cent respectively in 1947. Construction rose 43.3 per cent while fisheries and manufactures followed with increases of 39.7 per cent and 32.5 per cent. Manufacturing, forestry and mining in that order are the leading branches of industry.

CHART 9.

NET VALUE OF PRODUCTION IN LEADING INDUSTRIES EXCLUDING AGRICULTURE QUEBEC

MILLION
DOLLARS

MILLION
DOLLARS



SURVEY OF PRODUCTION IN CANADA, 1942 TO 1947

CANADA

Table 7. - Net Value of Production by Provinces in Dollars

| Province | 1942 | 1943 | 1944 | 1945 | 1946 | 1947 |
|-----------------------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|
| Prince Edward Island | 15,522,897 | 19,380,160 | 18,844,736 | 20,658,906 | 22,144,302 | 21,840,154 |
| Nova Scotia | 158,577,888 | 184,512,443 | 193,557,552 | 186,931,838 | 197,329,638 | 208,889,897 |
| New Brunswick | 110,857,300 | 127,253,333 | 135,117,593 | 139,435,407 | 162,700,528 | 191,525,027 |
| Quebec | 1,580,441,607 | 1,809,093,691 | 1,899,824,337 | 1,716,038,573 | 1,775,525,027 | 2,069,847,205 |
| Ontario | 2,425,316,146 | 2,579,898,516 | 2,682,969,260 | 2,510,200,208 | 2,557,193,323 | 3,177,503,242 |
| Manitoba | 268,727,971 | 284,908,089 | 313,077,535 | 280,458,384 | 329,300,254 | 368,006,138 |
| Saskatchewan | 436,767,715 | 345,132,184 | 528,817,265 | 339,755,726 | 388,858,319 | 456,414,057 |
| Alberta | 394,097,661 | 328,217,886 | 416,117,352 | 340,703,182 | 434,902,340 | 495,086,290 |
| British Columbia | 483,017,424 | 562,520,164 | 543,947,198 | 547,116,908 | 583,012,640 | 769,392,150 |
| Yukon and Northwest Territories . | 9,630,295 | 7,818,293 | 5,134,538 | 4,656,619 | 6,598,538 | 6,911,115 |
| Total | 5,882,956,904 | 6,248,734,759 | 6,737,407,366 | 6,085,955,751 | 6,457,564,909 | 7,765,415,275 |

Table 8. - Percentage of Total Net Production by Provinces

| Province | 1942 | 1943 | 1944 | 1945 | 1946 | 1947 |
|-----------------------------------|---------------|---------------|---------------|---------------|---------------|---------------|
| Prince Edward Island | 0.26 | 0.31 | 0.28 | 0.34 | 0.34 | 0.28 |
| Nova Scotia | 2.70 | 2.95 | 2.87 | 3.07 | 3.06 | 2.69 |
| New Brunswick | 1.88 | 2.04 | 2.01 | 2.29 | 2.52 | 2.47 |
| Quebec | 26.86 | 28.95 | 28.20 | 28.20 | 27.50 | 26.65 |
| Ontario | 41.24 | 41.29 | 39.81 | 41.24 | 39.60 | 40.92 |
| Manitoba | 4.57 | 4.56 | 4.65 | 4.61 | 5.10 | 4.74 |
| Saskatchewan | 7.42 | 5.52 | 7.85 | 5.58 | 6.02 | 5.88 |
| Alberta | 6.70 | 5.25 | 6.18 | 5.60 | 6.73 | 6.37 |
| British Columbia | 8.21 | 9.00 | 8.07 | 8.99 | 9.03 | 9.91 |
| Yukon and Northwest Territories . | 0.16 | 0.13 | 0.08 | 0.08 | 0.10 | 0.09 |
| Total | 100.00 | 100.00 | 100.00 | 100.00 | 100.00 | 100.00 |

Table 9. - Net Forest Products Duplication by Provinces in Dollars
(See page 38 for Description)

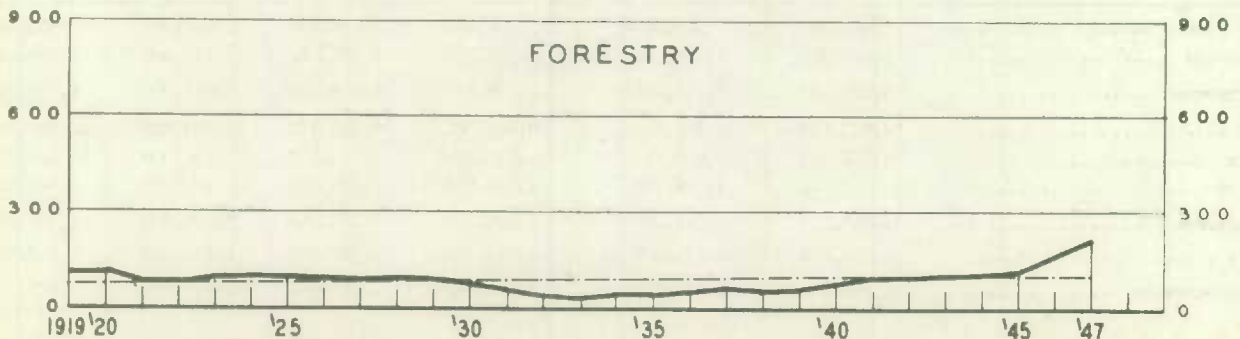
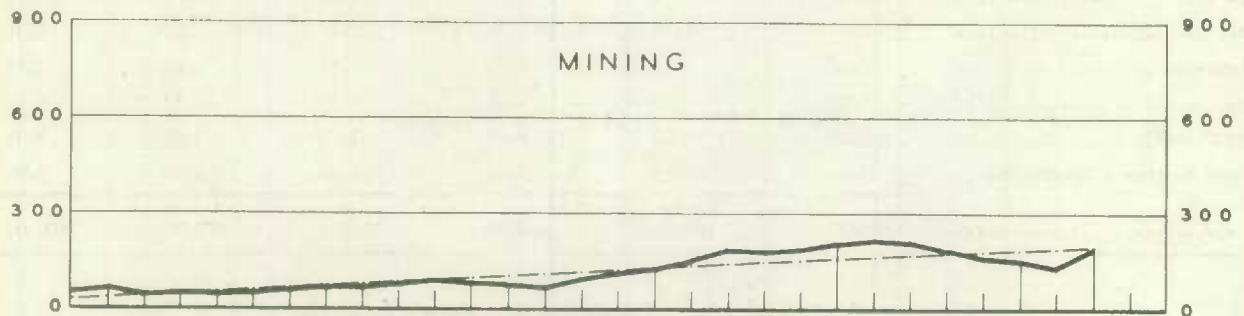
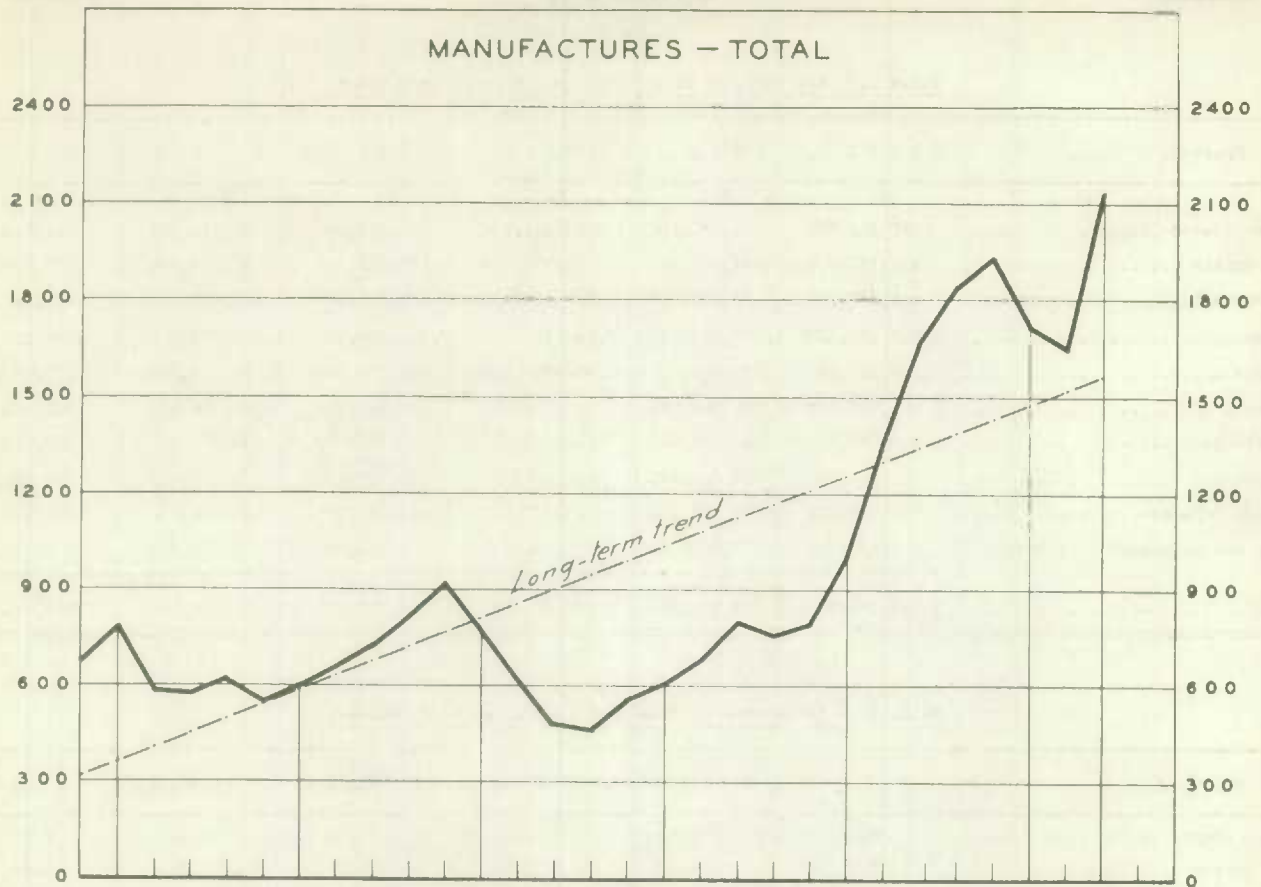
| Province | 1942 | 1943 | 1944 | 1945 | 1946 | 1947 |
|----------------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|
| Prince Edward Island | 341,849 | 527,387 | 726,476 | 759,072 | 819,000 | 983,000 |
| Nova Scotia | 3,026,753 | 4,030,038 | 4,342,399 | 4,511,241 | 5,847,000 | 6,255,000 |
| New Brunswick | 5,777,953 | 7,242,136 | 6,371,359 | 6,416,520 | 8,054,000 | 8,748,000 |
| Quebec | 22,522,617 | 30,561,650 | 27,005,001 | 29,942,162 | 34,699,000 | 40,269,000 |
| Ontario | 9,258,912 | 12,669,823 | 13,997,398 | 13,733,690 | 16,816,000 | 19,487,000 |
| Manitoba | 1,316,314 | 2,178,726 | 1,942,755 | 2,083,649 | 1,500,000 | 1,765,000 |
| Saskatchewan | 2,269,398 | 3,528,287 | 2,908,255 | 2,980,298 | 2,287,000 | 2,737,000 |
| Alberta | 1,594,048 | 2,131,639 | 2,542,274 | 2,572,367 | 1,831,000 | 2,215,000 |
| British Columbia | 866,596 | 1,130,928 | 1,521,916 | 1,502,947 | 1,663,000 | 1,979,000 |
| Canada | 46,974,440 | 64,000,614 | 61,357,833 | 64,501,946 | 73,516,000 | 84,438,000 |

CHART 10.

NET VALUE OF PRODUCTION IN LEADING INDUSTRIES EXCLUDING AGRICULTURE ONTARIO

MILLION
DOLLARS

MILLION
DOLLARS



SURVEY OF PRODUCTION IN CANADA

CANADA

Table 10. - Gross Value of Production in Dollars

| Industry | Prince Edward Island | | Nova Scotia | | New Brunswick | |
|---------------------------|----------------------|------------|-------------|-------------|---------------|-------------|
| | 1946 | 1947 | 1946 | 1947 | 1946 | 1947 |
| Agriculture | 19,698,000 | 20,558,000 | 44,132,000 | 42,326,000 | 48,071,000 | 50,822,000 |
| Forestry | 1,708,820 | 1,820,782 | 41,646,040 | 51,151,086 | 97,341,630 | 118,232,891 |
| Fisheries | 7,467,519 | 4,561,326 | 55,060,999 | 42,934,490 | 23,382,223 | 23,052,021 |
| Trapping | 18,537 | 9,115 | 733,054 | 303,434 | 239,943 | 259,972 |
| Mining | - | - | 34,337,638 | 32,943,895 | 4,839,047 | 5,821,960 |
| Electric Power | 561,804 | 651,264 | 8,480,811 | 8,772,494 | 5,675,420 | 6,208,702 |
| Construction | 2,381,620 | 3,070,960 | 40,858,319 | 52,896,815 | 27,761,110 | 42,674,675 |
| Custom and Repair | 1,381,000 | 1,600,000 | 11,490,000 | 13,312,000 | 6,946,000 | 8,047,000 |
| Manufactures, Total | 11,200,310 | 12,653,451 | 178,793,420 | 204,219,433 | 170,753,741 | 208,366,438 |
| Total | 44,439,610 | 44,924,898 | 415,532,281 | 448,859,647 | 385,010,114 | 463,485,659 |
| Less: Duplication | 6,088,559 | 4,649,309 | 65,127,782 | 67,660,553 | 84,276,951 | 98,476,158 |
| GRAND TOTAL | 38,351,051 | 40,275,589 | 350,404,499 | 381,199,094 | 300,733,163 | 365,009,501 |

| Industry | Quebec | | Ontario | | Manitoba | |
|---------------------------|---------------|---------------|---------------|---------------|-------------|-------------|
| | 1946 | 1947 | 1946 | 1947 | 1946 | 1947 |
| Agriculture | 322,994,000 | 332,430,000 | 554,204,000 | 602,212,000 | 173,345,000 | 191,023,000 |
| Forestry | 500,909,018 | 620,888,790 | 294,390,605 | 388,391,163 | 15,594,956 | 18,786,722 |
| Fisheries | 11,743,156 | 7,700,594 | 6,296,658 | 5,403,662 | 4,871,037 | 5,329,448 |
| Trapping | 5,308,477 | 2,737,327 | 7,792,630 | 4,601,807 | 5,011,880 | 2,295,658 |
| Mining | 200,418,470 | 258,046,406 | 267,623,593 | 366,513,876 | 24,199,531 | 26,633,162 |
| Electric Power | 84,886,712 | 93,926,321 | 73,622,911 | 79,501,791 | 12,066,618 | 12,719,538 |
| Construction | 225,582,288 | 338,514,778 | 347,616,749 | 501,650,833 | 43,462,500 | 61,254,260 |
| Custom and Repair | 95,922,000 | 111,130,000 | 119,634,000 | 138,601,000 | 18,983,000 | 21,993,000 |
| Manufactures, Total | 2,497,971,521 | 3,017,049,422 | 3,754,523,701 | 4,903,472,526 | 351,887,099 | 383,130,281 |
| Total | 3,945,735,642 | 4,782,423,638 | 5,425,704,847 | 6,990,348,658 | 649,421,621 | 723,165,069 |
| Less: Duplication | 503,973,460 | 638,483,146 | 361,988,978 | 515,596,416 | 24,102,281 | 28,599,211 |
| GRAND TOTAL | 3,441,764,182 | 4,143,940,492 | 5,063,715,869 | 6,474,752,242 | 625,319,340 | 694,565,858 |

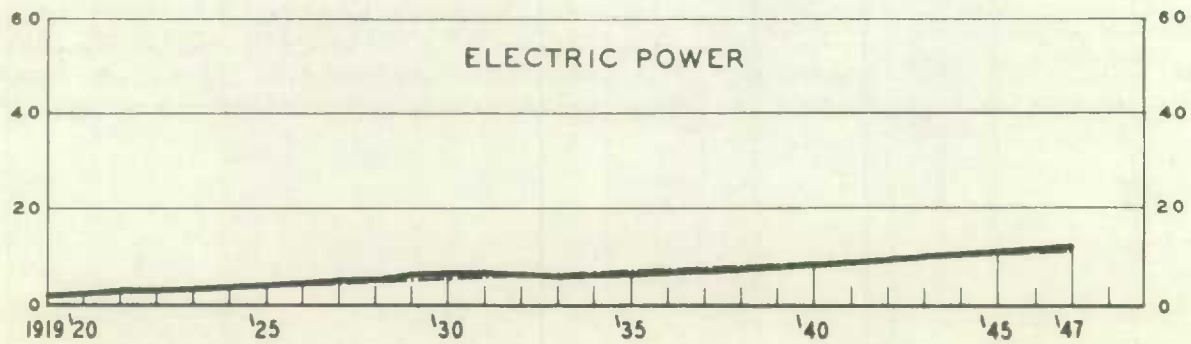
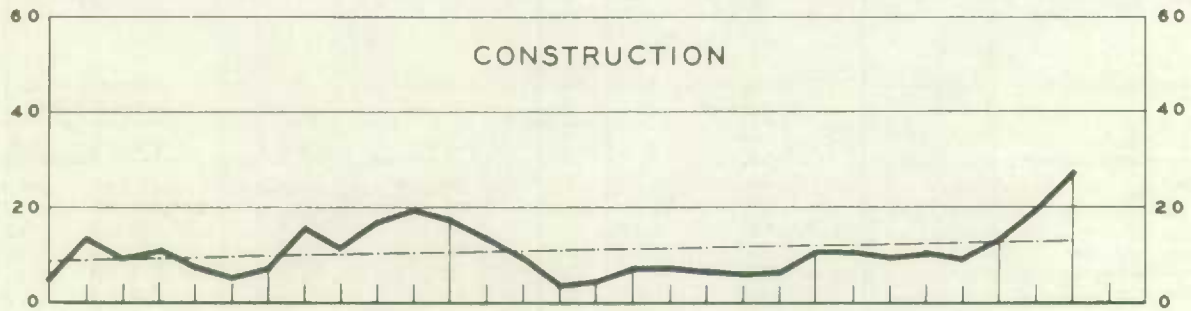
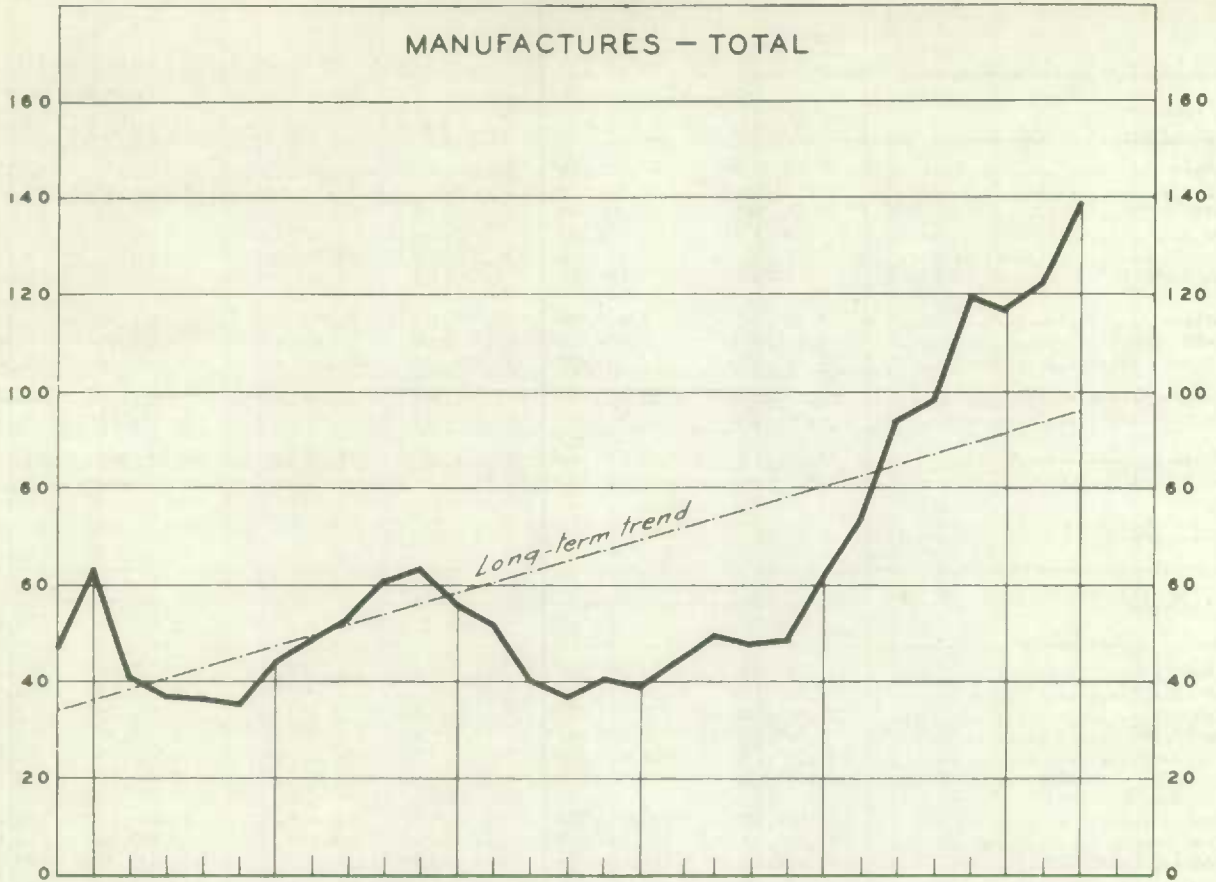
| Industry | Saskatchewan | | Alberta | | British Columbia | |
|---------------------------|--------------|-------------|-------------|-------------|------------------|---------------|
| | 1946 | 1947 | 1946 | 1947 | 1946 | 1947 |
| Agriculture | 373,114,000 | 432,264,000 | 310,272,000 | 356,362,000 | 91,471,000 | 101,525,000 |
| Forestry | 9,797,617 | 10,507,348 | 17,655,132 | 19,361,510 | 249,927,056 | 399,731,587 |
| Fisheries | 1,148,886 | 1,170,930 | 1,339,083 | 856,609 | 65,129,839 | 82,731,963 |
| Trapping | 2,677,078 | 1,449,221 | 2,974,120 | 1,537,973 | 2,894,470 | 1,616,529 |
| Mining | 45,805,802 | 59,422,497 | 56,862,309 | 64,577,314 | 117,827,745 | 191,900,246 |
| Electric Power | 7,705,605 | 9,294,502 | 9,822,027 | 10,609,298 | 23,008,912 | 17,046,044 |
| Construction | 29,277,215 | 40,008,598 | 51,573,396 | 67,651,310 | 100,148,206 | 148,813,448 |
| Custom and Repair | 14,626,000 | 16,945,000 | 17,083,000 | 19,791,000 | 28,245,000 | 32,722,000 |
| Manufactures, Total | 168,356,619 | 196,452,199 | 257,031,867 | 296,054,129 | 644,527,898 | 858,284,592 |
| Total | 652,508,822 | 767,514,295 | 724,612,934 | 836,801,143 | 1,323,180,126 | 1,834,371,409 |
| Less: Duplication | 25,986,672 | 32,582,409 | 16,000,441 | 17,694,678 | 272,742,646 | 423,673,750 |
| GRAND TOTAL | 626,522,150 | 734,931,886 | 708,612,493 | 819,106,465 | 1,050,437,480 | 1,410,697,659 |

CHART II.

NET VALUE OF PRODUCTION
IN LEADING INDUSTRIES EXCLUDING AGRICULTURE
MANITOBA

MILLION
DOLLARS

MILLION
DOLLARS



SURVEY OF PRODUCTION AND RELATED FACTORS

Yukon and Northwest Territories.

Mining and trapping accounted for nearly 80 per cent of the total net value of production. Trapping, as in eight of the nine provinces, fell sharply while mining registered a gain of 76.8 per cent over 1946 which is mainly responsible for the increase of nearly 5 per cent in the total production.

Volume of Production.

A rough impression of the expansion in the volume of production may be obtained by dividing the net value by the most appropriate price indexes or by the use of volume of production indexes. The method used for the nine series is outlined on page 40.

In 1947 higher price levels were wholly responsible for the rise in value of production of three of the nine industries when compared with 1946. Agriculture, fisheries and custom and repair, although showing increases in value, recorded declines in physical output. Trapping was down both in value and volume although lower prices accounted largely for the decline in value.

Increased volume output was mainly responsible for the rise in value of electric power. In the other four industries viz. forestry, mining, construction and manufactures, higher prices combined with greater physical output to establish record levels of net value in 1947.

Comparison With Other Factors.

Charts 17 and 18 show a comparison of the movement of the net value of production with that of other well known economic series during the ten years from 1938 to 1947. The index of industrial production, based on the physical output of manufactures, mining and electric power, after post-war declines in 1945 and 1946, reversed the trend in 1947. The only marked difference between this series and that on the net value of production was the decline of the former in 1946.

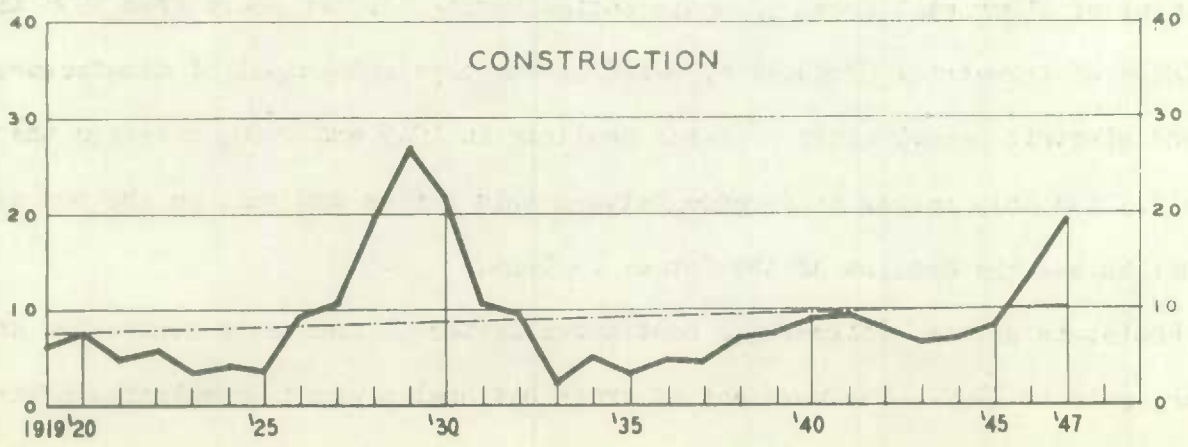
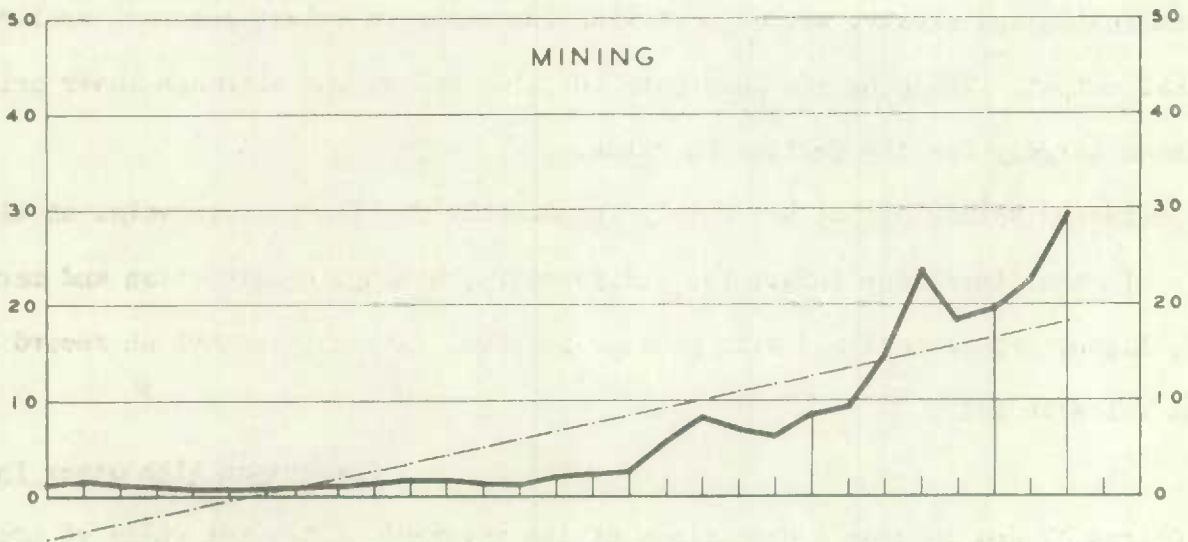
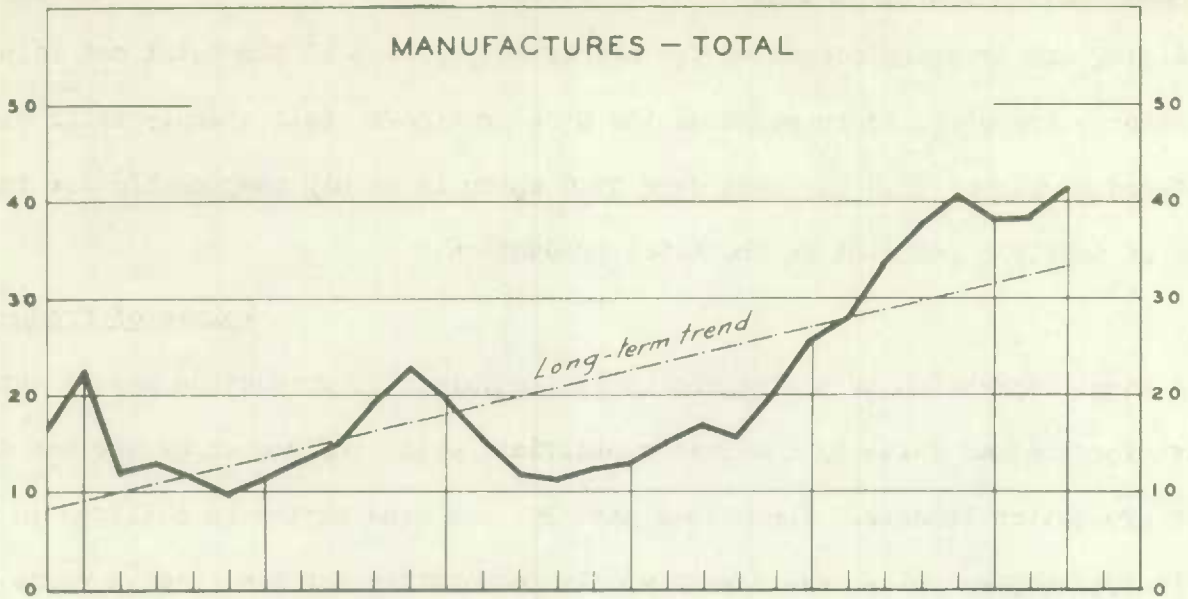
Wholesale prices, following a continuous series of increases since 1939 showed a sharp gain in 1947. The movement of gross national product, consisting of the sum

CHART 12

NET VALUE OF PRODUCTION IN LEADING INDUSTRIES EXCLUDING AGRICULTURE SASKATCHEWAN

MILLION
DOLLARS

MILLION
DOLLARS



SURVEY OF PRODUCTION IN CANADA

CANADA

Table 11. - Net Value of Production in Dollars

| Industry | Prince Edward Island | | Nova Scotia | | New Brunswick | |
|---------------------------|----------------------|------------|-------------|-------------|---------------|-------------|
| | 1946 | 1947 | 1946 | 1947 | 1946 | 1947 |
| Agriculture | 13,320,000 | 13,231,000 | 32,071,000 | 28,369,000 | 35,680,000 | 36,195,000 |
| Forestry | 1,166,871 | 1,232,466 | 24,154,765 | 30,302,069 | 54,019,923 | 67,704,969 |
| Fisheries | 4,155,906 | 2,609,948 | 31,489,194 | 24,230,084 | 13,988,338 | 13,708,406 |
| Trapping | 18,537 | 9,115 | 733,054 | 303,434 | 239,943 | 259,972 |
| Mining | - | - | 26,425,106 | 25,851,459 | 4,236,861 | 5,067,591 |
| Electric Power | 344,048 | 394,495 | 7,077,258 | 7,572,785 | 4,866,590 | 5,078,474 |
| Construction | 966,602 | 1,516,259 | 21,754,231 | 28,436,771 | 14,409,598 | 20,513,711 |
| Custom and Repair | 938,000 | 1,087,000 | 7,797,000 | 9,033,000 | 4,714,000 | 5,461,000 |
| Manufactures, Total | 3,469,435 | 3,849,353 | 71,738,873 | 84,935,517 | 67,783,377 | 83,487,984 |
| Total | 24,379,399 | 23,929,636 | 223,240,481 | 239,034,110 | 199,938,630 | 237,477,107 |
| Less: Duplication | 2,235,097 | 2,089,482 | 25,910,843 | 30,144,222 | 37,238,102 | 45,952,080 |
| GRAND TOTAL | 22,144,302 | 21,840,154 | 197,329,638 | 208,889,897 | 162,700,528 | 191,525,027 |

| Industry | Quebec | | Ontario | | Manitoba | |
|---------------------------|---------------|---------------|---------------|---------------|-------------|-------------|
| | 1946 | 1947 | 1946 | 1947 | 1946 | 1947 |
| Agriculture | 234,702,000 | 226,174,000 | 405,074,000 | 423,196,000 | 139,846,000 | 152,613,000 |
| Forestry | 287,046,710 | 356,247,175 | 167,772,531 | 224,162,079 | 10,296,791 | 12,364,211 |
| Fisheries | 7,219,982 | 4,789,794 | 6,296,658 | 5,403,662 | 4,871,037 | 5,329,448 |
| Trapping | 5,308,477 | 2,737,327 | 7,792,630 | 4,601,807 | 5,011,880 | 2,295,658 |
| Mining | 97,020,447 | 122,998,963 | 147,605,421 | 194,853,504 | 12,480,188 | 14,630,955 |
| Electric Power | 84,822,248 | 93,895,252 | 73,546,935 | 79,438,924 | 12,001,213 | 12,649,996 |
| Construction | 101,328,551 | 156,897,939 | 163,265,558 | 244,552,609 | 19,936,046 | 27,857,666 |
| Custom and Repair | 65,085,000 | 75,404,000 | 81,177,000 | 94,047,000 | 12,881,000 | 14,923,000 |
| Manufactures, Total | 1,125,991,848 | 1,324,397,690 | 1,659,284,622 | 2,136,014,184 | 122,780,805 | 139,373,521 |
| Total | 2,008,525,263 | 2,363,541,465 | 2,711,815,355 | 3,406,269,769 | 340,104,960 | 382,037,455 |
| Less: Duplication | 233,000,236 | 293,694,935 | 154,622,032 | 228,766,527 | 10,804,706 | 14,031,317 |
| GRAND TOTAL | 1,775,525,027 | 2,069,847,205 | 2,557,193,323 | 3,177,503,242 | 329,300,254 | 368,006,138 |

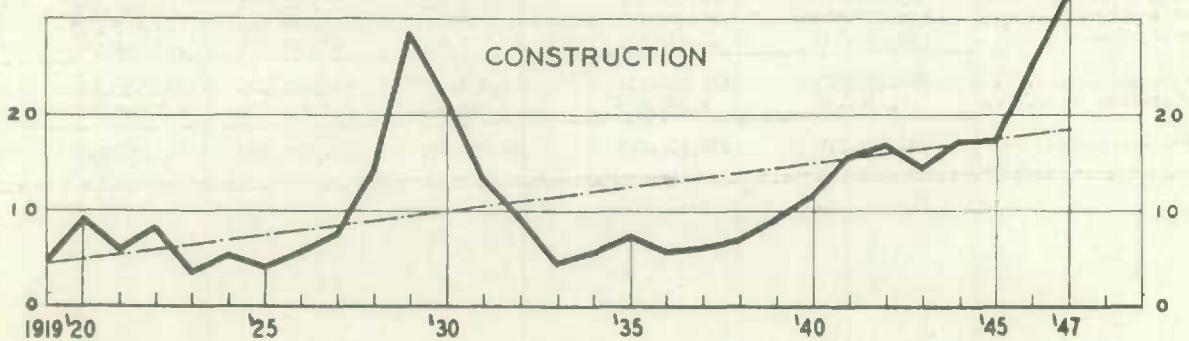
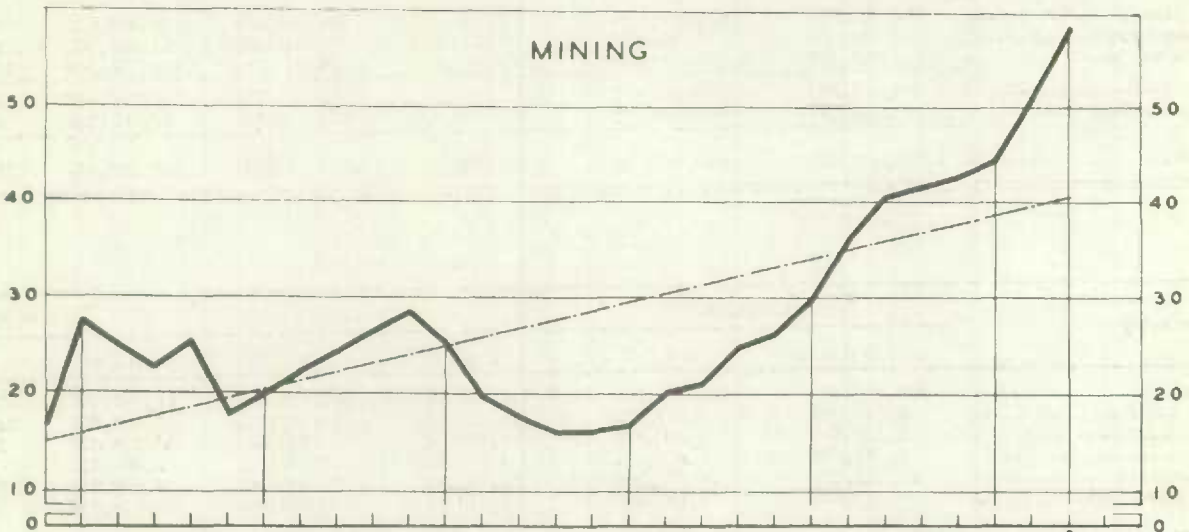
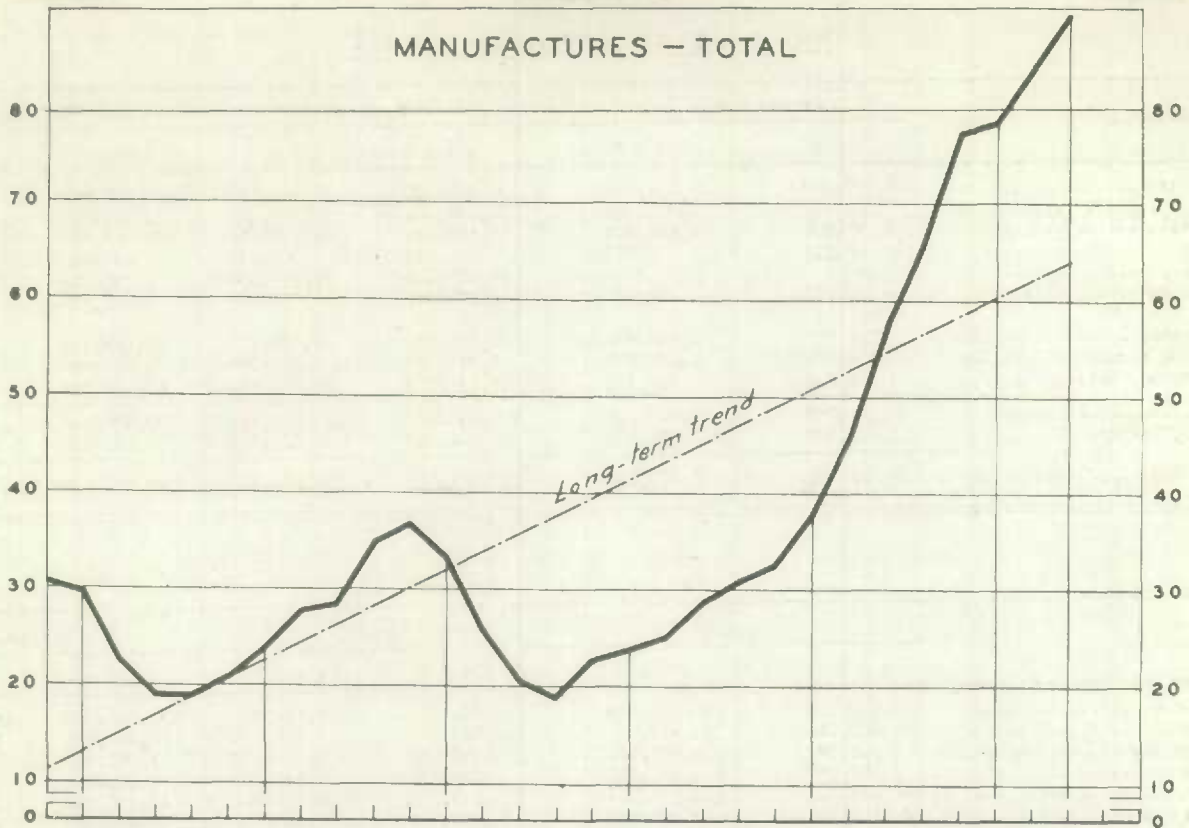
| Industry | Saskatchewan | | Alberta | | British Columbia | |
|---------------------------|--------------|-------------|-------------|-------------|------------------|-------------|
| | 1946 | 1947 | 1946 | 1947 | 1946 | 1947 |
| Agriculture | 292,232,000 | 340,746,000 | 248,804,000 | 287,539,000 | 66,298,000 | 71,541,000 |
| Forestry | 6,757,053 | 7,339,092 | 11,211,114 | 12,283,193 | 148,590,669 | 242,266,466 |
| Fisheries | 1,148,886 | 1,170,930 | 1,339,083 | 856,609 | 36,835,800 | 51,451,168 |
| Trapping | 2,677,078 | 1,449,221 | 2,974,120 | 1,537,973 | 2,894,470 | 1,616,529 |
| Mining | 22,743,522 | 29,577,508 | 50,981,943 | 58,099,365 | 58,629,880 | 97,781,055 |
| Electric Power | 6,337,824 | 8,597,876 | 9,010,692 | 9,693,602 | 22,256,339 | 16,173,272 |
| Construction | 13,855,512 | 19,742,010 | 25,170,956 | 33,241,838 | 48,008,608 | 68,780,649 |
| Custom and Repair | 9,925,000 | 11,499,000 | 11,591,000 | 13,429,000 | 19,165,000 | 22,203,000 |
| Manufactures, Total | 38,459,630 | 41,480,520 | 83,735,011 | 89,289,825 | 293,352,652 | 388,702,178 |
| Total | 394,136,505 | 461,602,157 | 444,817,919 | 505,970,405 | 696,031,418 | 960,515,317 |
| Less: Duplication | 5,278,186 | 5,188,100 | 9,915,579 | 10,884,115 | 113,018,778 | 191,123,167 |
| GRAND TOTAL | 388,858,319 | 456,414,057 | 434,902,340 | 495,086,290 | 583,012,640 | 769,392,150 |

CHART 13.

NET VALUE OF PRODUCTION IN LEADING INDUSTRIES EXCLUDING AGRICULTURE ALBERTA

MILLION
DOLLARS

MILLION
DOLLARS



SURVEY OF PRODUCTION AND RELATED FACTORS

of national income, depreciation charges and indirect taxes less subsidies, followed closely that of the net value of commodity production.

Further increases in industrial production, wholesale prices and gross national product in 1948 indicate beyond doubt that the value of commodity production in that year has surpassed the 1947 record and established a new maximum.

The direction of the movement of exports follows closely that of industrial production throughout the period, as both were affected directly by war requirements, subsequent declines in commitments following the end of hostilities and the post-war release of pent-up demand for consumers' goods in Canada and abroad.

The trend of government expenditures followed the same general direction as that of the value of production until 1945. After declining slightly in 1945 and 1946, following the year of peak war expenditures in 1943-44 and subsequent demobilization and reconversion outlays, it dropped sharply in the fiscal year 1946-47 and receded further in 1948.

DESCRIPTION OF METHOD

The scope of the report is limited to a discussion of the production of commodities, classified as primary and secondary operations. The activities of the transport, trade, finance, government and service groups are entirely excluded.

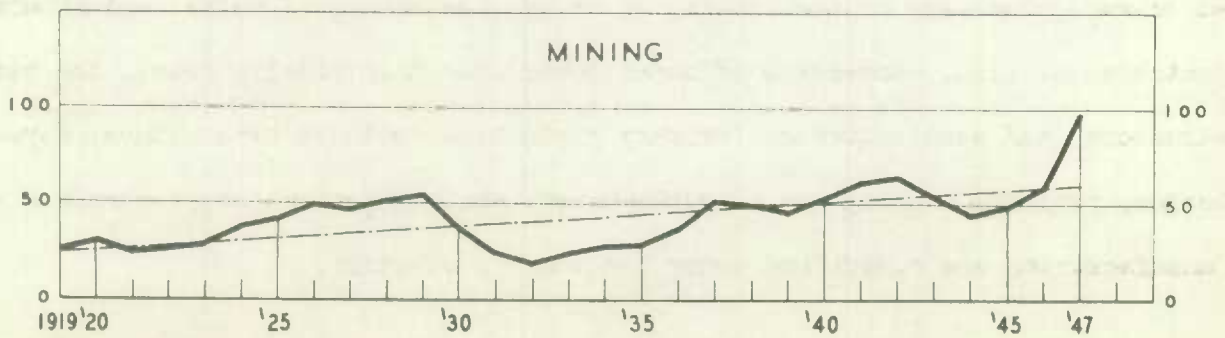
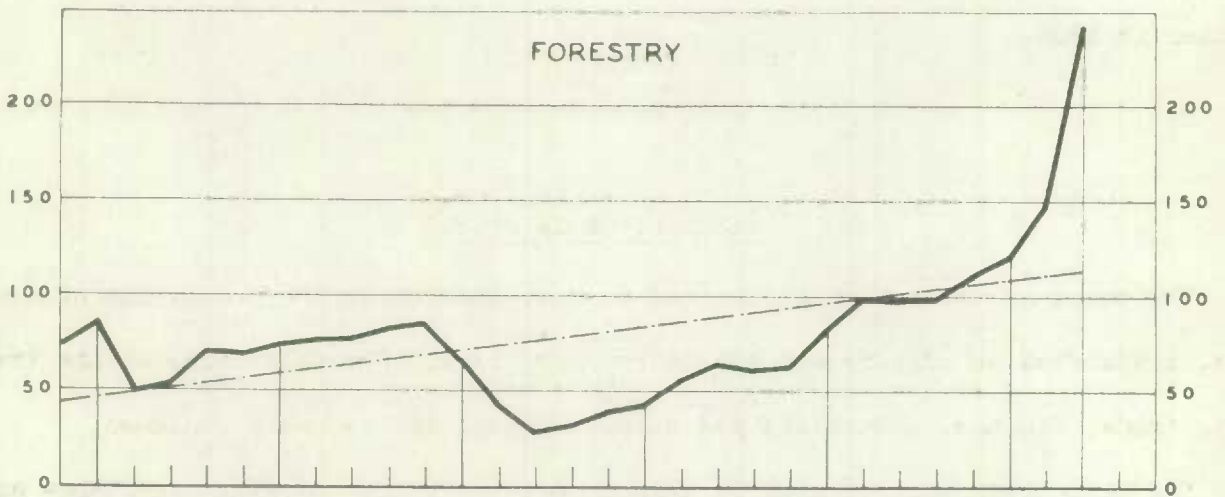
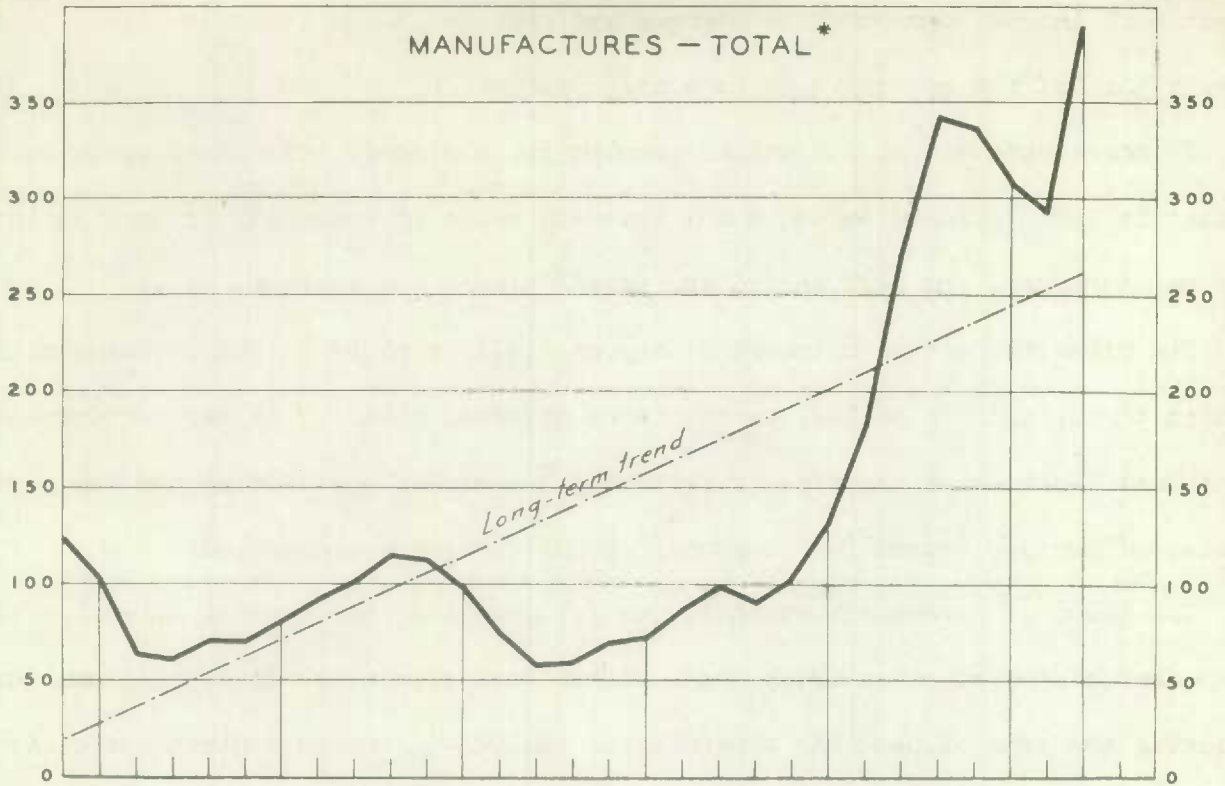
The term production is used in this connection in its popular acceptance as applied to such processes as the growing of crops, the mining of metals and minerals, the catching of fish, conversion of water power into electrical current, the building of structures and manufacturing. Primary production includes agriculture, forestry, fisheries, trapping, mining and electric power, while construction, custom and repair and manufacturing are classified under secondary production.

CHART 14

NET VALUE OF PRODUCTION
IN LEADING INDUSTRIES EXCLUDING AGRICULTURE
BRITISH COLUMBIA

MILLION
DOLLARS

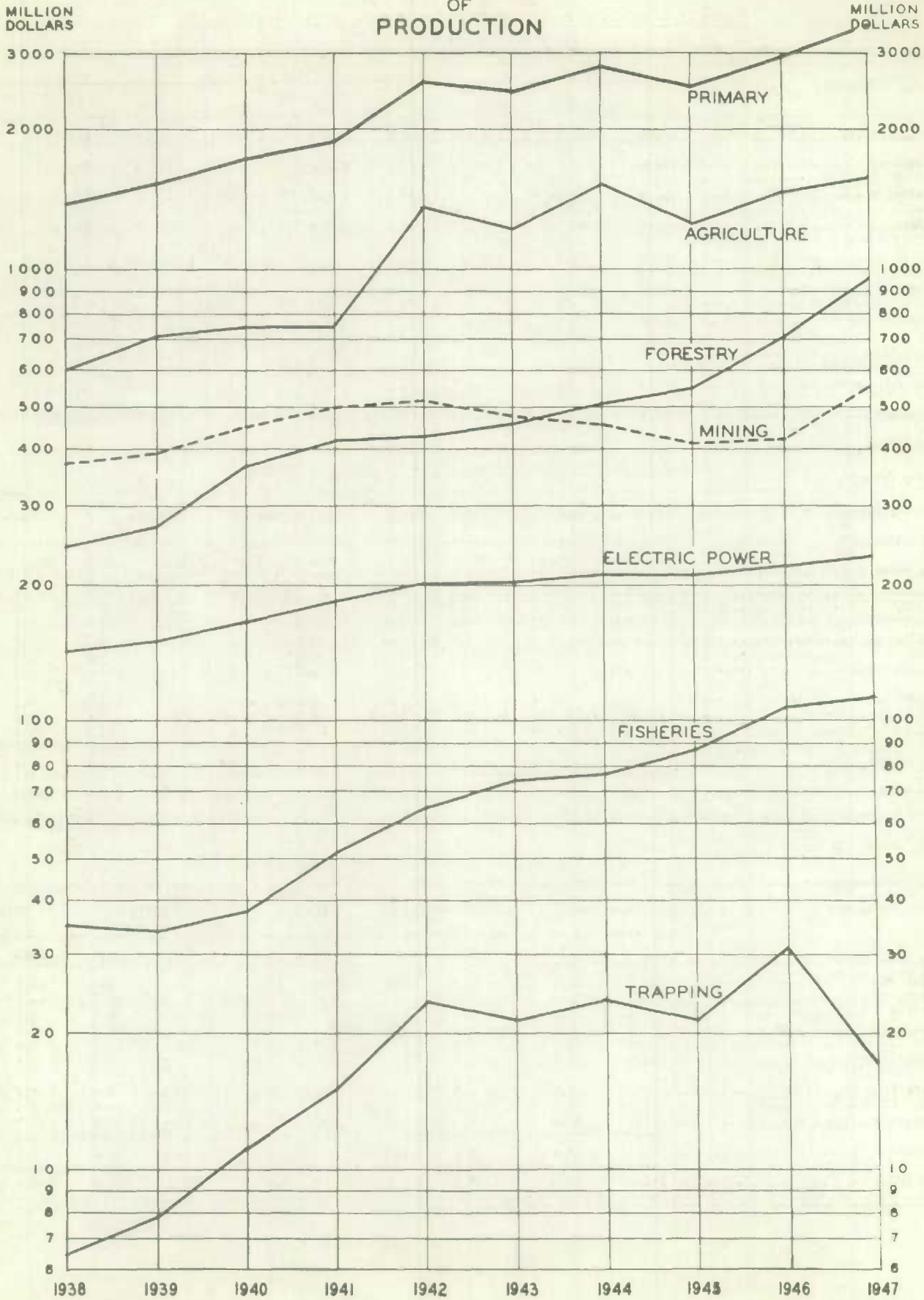
MILLION
DOLLARS



* INCLUDES YUKON AND NORTHWEST TERRITORIES

CHART 15.

NET VALUE OF PRODUCTION



SURVEY OF PRODUCTION IN CANADA

Table 13. - Volume of Production Expressed in Terms of 1938 equalling 100

| Industry | Percentage of 1938 Net Values | | | | | | | | |
|----------------------------|-------------------------------|-------|-------|-------|-------|-------|-------|-------|-------|
| | 1938 | 1940 | 1941 | 1942 | 1943 | 1944 | 1945 | 1946 | 1947 |
| Agriculture (1)..... | 100.0 | 121.1 | 101.2 | 152.9 | 105.9 | 130.7 | 103.3 | 117.1 | 107.8 |
| Forestry | 100.0 | 132.1 | 139.1 | 133.5 | 133.8 | 136.4 | 145.5 | 170.3 | 186.2 |
| Forestry, n.e.s. (2) | 100.0 | 135.8 | 146.1 | 138.6 | 134.5 | 139.8 | 149.8 | 178.0 | 197.9 |
| Fisheries | 100.0 | 92.9 | 112.6 | 118.0 | 117.8 | 119.3 | 160.2 | 151.0 | 141.0 |
| Trapping | 100.0 | 154.3 | 152.2 | 259.2 | 170.2 | 186.3 | 170.0 | 240.7 | 199.6 |
| Mining | 100.0 | 115.1 | 121.4 | 116.9 | 106.2 | 96.0 | 91.9 | 91.1 | 96.2 |
| Electric Power | 100.0 | 115.7 | 128.8 | 143.2 | 155.3 | 155.7 | 154.2 | 160.2 | 173.3 |
| Construction | 100.0 | 109.1 | 126.7 | 136.2 | 122.6 | 98.6 | 106.1 | 152.9 | 182.3 |
| Custom and Repair | 100.0 | 97.1 | 104.8 | 106.7 | 104.6 | 116.3 | 124.1 | 141.6 | 138.1 |
| Manufactures - Total | 100.0 | 130.9 | 168.7 | 216.4 | 235.3 | 233.2 | 196.3 | 180.3 | 196.4 |
| Manufactures, n.e.s. | 100.0 | 131.2 | 173.0 | 228.7 | 250.7 | 248.9 | 207.4 | 187.4 | 203.6 |
| Primary Production | 100.0 | 120.6 | 116.8 | 139.6 | 116.0 | 125.2 | 114.3 | 125.2 | 126.3 |
| Secondary Production | 100.0 | 126.5 | 160.3 | 201.2 | 215.3 | 211.9 | 182.4 | 175.0 | 191.2 |
| Duplication | 100.0 | 129.2 | 147.8 | 155.8 | 159.4 | 155.8 | 142.0 | 145.4 | 160.9 |
| GRAND TOTAL | 100.0 | 123.4 | 140.3 | 175.2 | 171.9 | 174.6 | 152.8 | 153.4 | 162.4 |

(1) Revised according to the new index number of the physical volume of agricultural production in Canada, 1935-48.

(2) Based on the value of woods operations after deduction of the output on wood lots of farms for sale or use by the farmer.

Table 14. - Per Capita Net Value of Production in Dollars

| Province | 1938 | 1940 | 1941 | 1942 | 1943 | 1944 | 1945 | 1946 | 1947 |
|-----------------------------------|------|------|------|------|------|------|------|------|------|
| CANADA | 256 | 321 | 389 | 505 | 529 | 563 | 502 | 525 | 617 |
| Prince Edward Island | 94 | 114 | 112 | 172 | 213 | 207 | 225 | 236 | 232 |
| Nova Scotia | 176 | 211 | 222 | 268 | 304 | 316 | 301 | 322 | 336 |
| New Brunswick | 145 | 179 | 211 | 239 | 275 | 292 | 298 | 339 | 390 |
| Quebec | 227 | 294 | 376 | 466 | 523 | 543 | 482 | 489 | 558 |
| Ontario | 342 | 416 | 531 | 624 | 659 | 677 | 627 | 624 | 759 |
| Manitoba | 198 | 233 | 268 | 371 | 392 | 428 | 381 | 453 | 495 |
| Saskatchewan | 131 | 241 | 198 | 515 | 410 | 625 | 402 | 467 | 542 |
| Alberta | 258 | 297 | 280 | 508 | 414 | 509 | 412 | 542 | 602 |
| British Columbia | 308 | 356 | 458 | 555 | 625 | 584 | 577 | 581 | 737 |
| Yukon and Northwest Territories . | 267 | 377 | 485 | 566 | 460 | 302 | 274 | 275 | 288 |

SURVEY OF PRODUCTION AND RELATED FACTORS

Gross and Net Production.

The value of production is shown under two headings, namely gross and net. Gross production represents the total value of all the individual commodities produced under the specified headings. Net production is computed by deducting from the gross production the cost of materials, fuel, purchased electricity, and process supplies consumed in the production process. The cost of fuel and electricity is deducted in accordance with Resolution 23 of the Conference of British Commonwealth Statisticians, meeting in Ottawa during 1935. A survey of production must differentiate between the more important branches and at the same time present a grand total that will be free from overlapping. For example, brick, tile and cement are included under mineral production as being the first finished products of commercial value resulting from the production process. They may, however, be classified under manufactures in view of the nature of the productive process - either allocation being quite correct according to the point of view. In the initial presentation production in such industries is regarded both as primary and as secondary, but the duplication is eliminated from the grand totals. Following are notes further explaining the procedure that has been used in drawing up the tables:-

1. Agriculture. A new series of gross and net production was adopted for agriculture for the years 1938 to 1947. The statistics included in the tables of the report were prepared by the Agricultural Division of the Bureau. The computation was effected in connection with the project on net farm income. The Quarterly Bulletin of Agricultural Statistics, April-June, 1944 presents the background for the estimates introduced here. Gross farm income is the sum of the cash receipts from the sale of farm products, the income in kind and the value of changes in inventories. The imputed value of house rent is excluded. The income in kind consists of the commodities produced on the farm and consumed by the farm family, valued at its alternative market price. The inventory section consists of the value of positive or negative changes in livestock and

SURVEY OF PRODUCTION IN CANADA

Table 15. - Net Production

\$'000

| | Forestry | Fisheries | Trapping | Mining | Electric Power | Manufactures Total | Construction | Custom and Repair | Secondary Production |
|----------|----------|-----------|----------|---------|----------------|--------------------|--------------|-------------------|----------------------|
| 1919 ... | 357,688 | 51,040 | 14,468 | 130,588 | 45,305 | 1,442,401 | 128,079 | 48,485 | 1,623,965 |
| 1920 ... | 419,376 | 43,644 | 20,596 | 172,443 | 50,241 | 1,621,273 | 167,828 | 58,465 | 1,847,566 |
| 1921 ... | 272,798 | 31,335 | 9,816 | 126,170 | 55,242 | 1,123,694 | 166,945 | 57,874 | 1,348,513 |
| 1922 ... | 277,948 | 37,426 | 16,812 | 139,470 | 59,497 | 1,103,266 | 211,993 | 58,505 | 1,373,764 |
| 1923 ... | 328,660 | 38,322 | 16,163 | 145,471 | 64,858 | 1,206,332 | 190,794 | 61,584 | 1,458,710 |
| 1924 ... | 329,633 | 39,525 | 14,783 | 143,514 | 72,229 | 1,075,458 | 181,078 | 63,446 | 1,319,982 |
| 1925 ... | 333,186 | 42,803 | 14,777 | 160,867 | 77,075 | 1,167,937 | 178,428 | 65,722 | 1,412,087 |
| 1926 ... | 339,587 | 50,542 | 14,291 | 187,857 | 86,796 | 1,305,169 | 223,476 | 73,734 | 1,602,379 |
| 1927 ... | 340,787 | 44,673 | 17,639 | 200,218 | 101,730 | 1,427,649 | 251,742 | 80,739 | 1,760,130 |
| 1928 ... | 359,867 | 49,595 | 16,604 | 225,033 | 110,046 | 1,597,888 | 311,807 | 90,355 | 2,000,050 |
| 1929 ... | 371,690 | 48,612 | 16,350 | 253,155 | 119,868 | 1,755,387 | 372,755 | 85,104 | 2,213,246 |
| 1930 ... | 331,568 | 42,213 | 9,853 | 215,665 | 123,443 | 1,522,737 | 382,471 | 90,914 | 1,996,122 |
| 1931 ... | 233,162 | 27,421 | 8,708 | 190,163 | 120,418 | 1,252,017 | 314,457 | 89,732 | 1,656,206 |
| 1932 ... | 160,240 | 23,127 | 7,120 | 158,076 | 119,379 | 955,961 | 172,245 | 80,295 | 1,208,501 |
| 1933 ... | 153,241 | 24,451 | 7,259 | 182,324 | 115,664 | 919,671 | 100,697 | 78,067 | 1,098,435 |
| 1934 ... | 184,128 | 29,770 | 8,637 | 218,942 | 122,462 | 1,087,302 | 137,796 | 79,496 | 1,304,594 |
| 1935 ... | 197,805 | 30,269 | 8,877 | 238,581 | 125,123 | 1,153,485 | 149,279 | 83,471 | 1,386,235 |
| 1936 ... | 231,938 | 34,234 | 9,214 | 291,972 | 133,561 | 1,289,593 | 153,695 | 87,482 | 1,530,770 |
| 1937 ... | 284,493 | 34,439 | 10,477 | 372,796 | 140,964 | 1,508,925 | 193,444 | 98,485 | 1,800,854 |
| 1938 ... | 244,565 | 35,593 | 6,573 | 374,416 | 142,321 | 1,428,287 | 176,661 | 108,936 | 1,713,884 |
| 1939 ... | 271,723 | 34,379 | 7,919 | 393,232 | 149,864 | 1,531,052 | 183,706 | 108,821 | 1,823,579 |
| 1940 ... | 370,121 | 38,107 | 11,208 | 448,081 | 163,781 | 1,942,471 | 206,894 | 111,608 | 2,260,973 |
| 1941 ... | 421,419 | 51,770 | 15,138 | 497,905 | 183,146 | 2,605,120 | 269,562 | 130,778 | 3,005,460 |
| 1942 ... | 429,079 | 64,822 | 23,801 | 514,110 | 200,345 | 3,309,974 | 310,917 | 141,395 | 3,762,286 |
| 1943 ... | 462,815 | 74,656 | 21,580 | 475,529 | 200,833 | 3,816,414 | 293,538 | 144,952 | 4,254,904 |
| 1944 ... | 507,358 | 76,889 | 23,989 | 454,022 | 209,758 | 4,015,776 | 249,037 | 165,174 | 4,429,987 |
| 1945 ... | 550,971 | 103,106 | 21,505 | 413,277 | 210,007 | 3,564,316 | 267,958 | 178,200 | 4,010,474 |
| 1946 ... | 711,027 | 107,908 | 31,078 | 422,074 | 220,511 | 3,467,005 | 408,696 | 213,273 | 4,088,974 |
| 1947 ... | 953,919 | 110,088 | 16,843 | 552,310 | 233,861 | 4,292,056 | 601,539 | 247,086 | 5,140,681 |

Table 16. - Relation Of Net Production to Other Factors

| | Net Production \$'000,000 | Wholesale Prices 1926=100 | Industrial Production 1935-39=100 | Gross National Product \$'000,000 | Exports \$'000,000 | Dominion Expenditures \$'000,000 Fiscal Years |
|----------|------------------------------|------------------------------|--------------------------------------|--------------------------------------|-----------------------|-----------------------------------------------------|
| 1938 ... | 2,859 | 78.6 | 102.1 | 5,165 | 838 | 534 |
| 1939 ... | 3,100 | 75.4 | 109.3 | 5,598 | 925 | 553 |
| 1940 ... | 3,649 | 82.9 | 130.2 | 6,772 | 1,179 | 681 |
| 1941 ... | 4,479 | 90.0 | 157.2 | 8,434 | 1,621 | 1,250 |
| 1942 ... | 5,883 | 95.6 | 185.3 | 10,524 | 2,364 | 1,885 |
| 1943 ... | 6,249 | 100.0 | 198.6 | 11,298 | 2,971 | 4,387 |
| 1944 ... | 6,737 | 102.5 | 198.8 | 11,897 | 3,440 | 5,322 |
| 1945 ... | 6,086 | 103.6 | 176.3 | 11,759 | 3,218 | 5,246 |
| 1946 ... | 6,458 | 108.7 | 159.2 | 11,936 | 2,312 | 5,136 |
| 1947 ... | 7,765 | 129.1 | 175.5 | 13,591 | 2,775 | 2,634 |
| 1948 ... | | 153.4 | 181.5 | 15,450 ^P | 3,075 | 2,196 |

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poultry inventories for all provinces and grain inventories in the three Prairie Provinces.

Raw materials such as feed and seed purchased through market channels, tractor fuel, oil and grease, binder twine, fertilizer and fencing, etc., are deducted from the gross value of production to give the net value.

The discontinued series of gross and net production, as given in the numbers of the Survey of Production applicable to years prior to 1938, were published in the Monthly and Quarterly Bulletins of Agricultural Statistics for at least a quarter of a century. A revision for 1926 to 1941 was given in the Quarterly Bulletin for January-March, 1942. The net value was obtained by deducting from the gross value, the estimates of the value of farm products used for seed and feed for livestock. These products included feed grains, fodder crops and milk fed to livestock.

2. Forestry. The forestry totals were compiled by the Forestry Branch of the Bureau. The gross production resulting from operations in the woods is estimated on the footing of returns from the more important concerns carrying on logging operations regularly in Canada and from other special enquiries. The firms so covered produced about 37.5 per cent of the total cut in 1947. The cost of materials is computed by the Forestry Branch for the Dominion and distributed by provinces according to the amount of gross production. As the totals for agriculture include forest products obtained by farmers from wood lots of farms whether sold or retained for use, a certain amount of duplication exists between the totals for agriculture and forestry. The Dominion net total in 1947 was about \$84.4 million and deduction was made in this connection in the accompanying tables. The gross and net production of the sawmilling and pulp and paper industries are prepared and published year by year.

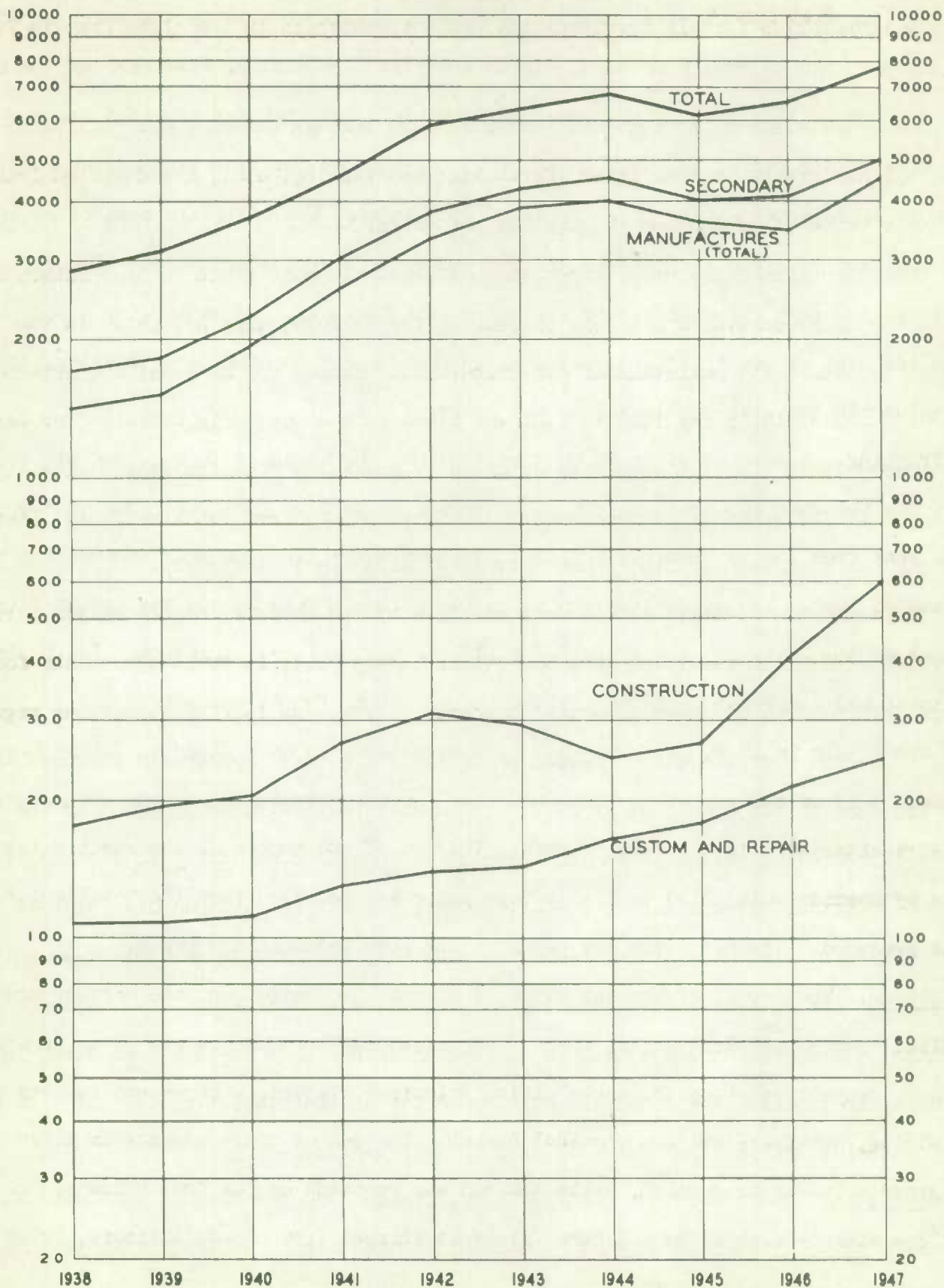
3. Fisheries. The sum of the value of the fisheries and the cost of fish used in factories is regarded as the gross revenue of the industry. The former is given historically in Table 15 on page 50 of the Bureau report for 1946. The totals include

CHART 16

NET VALUE OF PRODUCTION

MILLION DOLLARS

MILLION DOLLARS



SURVEY OF PRODUCTION AND RELATED FACTORS

the value of fish sold by fish curing and packing plants as well as the sales of fishermen other than to such processing establishments. The cost of fish used by the secondary phase of the industry is presented in Table 40 of the same report. The sum of the value of the fisheries shown in Table 15 and the cost of fish used as recorded in Table 40 is regarded as the gross value of production. Deducting the cost of materials, fuel and electricity from the gross revenue, we have the net value. The cost of materials and fuel and electricity are taken from Table 40. No data being available as to the cost of materials and fuel used by the primary phase of the industry, the net value was taken as equivalent to the gross.

4. Trapping. The value of production in the trapping industry in 1944 and preceding years was obtained by deducting the value of the pelts sold from fur farms in the calendar year from the total value of fur production during the fur year terminating at the end of June. The difference indicated for Prince Edward Island was arbitrarily reduced as the derived value given for wild life was believed excessive. The Dominion total was correspondingly reduced giving effect to the adjustment.

The totals in 1945, 1946 and 1947 were computed from data given in Tables 1 and 2, Pages 3-13 of the report on Fur Production for the respective seasons published by the Agricultural Division of the Bureau. The sum of the number of the ranch-raised pelts by species multiplied by the average price was deducted from the total value of pelts produced. The net value was taken at the same level as the gross.

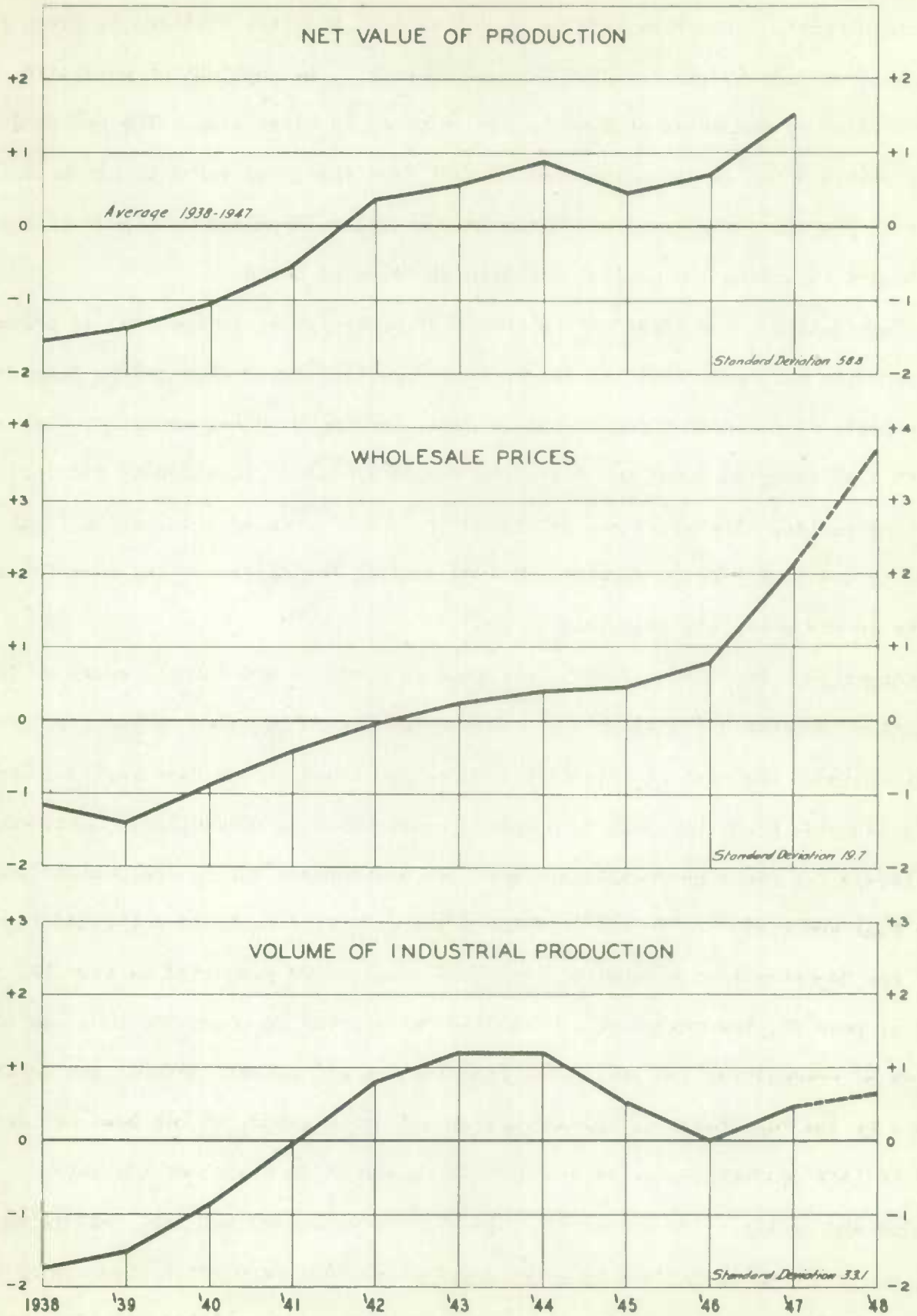
5. Mining. The amount of the net value of mineral production and the cost of process supplies, purchased electricity, fuel, freight and smelter charges are given in Columns 8 and 7, respectively, of the table giving principal statistics in recent reports of the Mining, Metallurgical and Chemical Branch. The sum of these amounts is taken as the gross value of production, while the net was reported as the "net value of bullion, ore, concentrates, residues and other minerals shipped from mines, smelters, brick and cement plants and quarries".

CHART 17.

NET PRODUCTION COMPARED WITH OTHER ECONOMIC FACTORS

UNIT OF
STANDARD
DEVIATION

UNIT OF
STANDARD
DEVIATION



SURVEY OF PRODUCTION AND RELATED FACTORS

6. Electric Power. The gross revenue of the Central Electric Stations is given from 1931 to 1946 on page 499 of the Year Book of 1948-49. The duplication consisting of power purchased by companies engaged in the industry is eliminated. The net production was obtained by deducting the cost of fuel from the gross value of production. The cost of fuel is given in line 4 of Table 5 entitled "Expenses" included in the annual report regarding the Central Electric Stations of Canada.

Primary Duplication. The gross and net value of agricultural production, as presented in the Canadian and Provincial tables, include forest products produced on farms whether for sale, or retained for purposes of fuel, fencing or other uses. As such products are also reported under forestry, the amount of the duplication is deducted in the various tables. The gross and net value of forest products obtained on farms were regarded as the same for the period from 1938 to 1943 but allowance was made for expenditure on raw materials from 1944 to 1947.

7. Construction. The value of work performed as given in the Annual report on the Construction Industry prepared by the Construction Branch is taken as the gross value of construction. The cost of materials used as published in the same series of reports is deducted from the gross to obtain the net value of production. Considerably higher levels for new construction and resource development during the period from 1926 to 1941 are given in "Public Investment and Capital Formation" published August, 1945 by the Department of Reconstruction. The results are presented as item 18, of Table 5 a, page 38, the method of computation being given on pages 102-106. As the net value of production, the provincial distribution and current data of the series published by the Department of Reconstruction are unavailable, it has been decided to present in this connection the version of the Construction Branch of the Bureau.

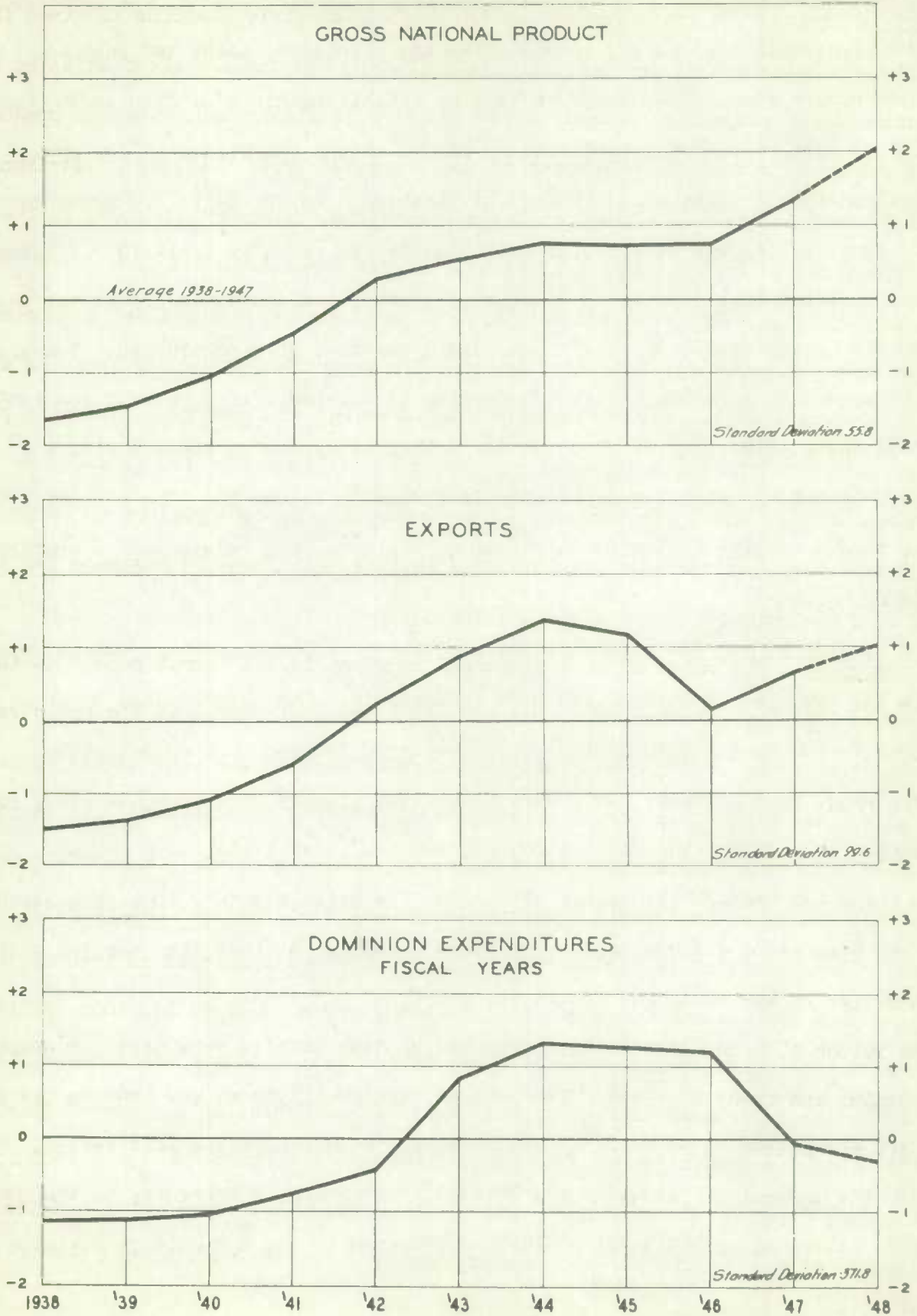
8. Custom and Repair. The custom and repair group comprises thirteen industries most of which are by themselves of minor importance. The main activities are as follows: Automobile repair, dyeing, cleaning and laundry, blacksmithing and the repair

CHART 18.

NET PRODUCTION COMPARED WITH OTHER ECONOMIC FACTORS

UNIT OF
STANDARD
DEVIATION

UNIT OF
STANDARD
DEVIATION



SURVEY OF PRODUCTION AND RELATED FACTORS

of bicycles, boots and shoes, harness and saddlery, jewellery, furs, business machines, radio and electrical appliances, upholstering and furniture, locks and guns and miscellaneous repair work. The Census of Trading Establishments conducted in 1930 and 1941, is the best source of information in regard to the operations of the group. The gross receipts of custom and repair establishments during 1941 were added to the revenues from repairs and services of retail stores as given in Table 19, of Volume 10 of the Eighth Census. Fourteen classes of stores, limited as accurately as possible to the stores rendering repair and custom service, were considered. The gross value of production was then adjusted according to the proportion of employee remuneration in the entire group as given by the decennial census to the salaries and wages paid by the appropriate establishments listed in Volume 10. The extension to 1947 was made according to the remuneration of employees and independent operators.

Estimate of Volume

The placing of the statistics of net production on a volume basis was attempted in Table 13. Totals for five of the nine industrial groups were divided by price indexes transferred to the base of 1938. The selected indexes were as follows:- forestry, wood, wood products and paper; fisheries, fishery products; trapping, furs; construction, building materials; custom and repair, general wholesale prices. Division by the price indexes ostensibly eliminated the price element, thus production during the nine years was expressed in dollars of 1938. A final step was the dividing of each series by the total for the latter year.

The volume of production indexes prepared by this section were used for manufactures, mining and electric power. The interim version of the volume indexes for recent years are presented on pages 12 and 18 of the Canadian Statistical Review. The volume of the agriculture industry was revised in this report according to the new index of the volume of agricultural production prepared by the Agriculture Division of the Bureau.

SURVEY OF PRODUCTION AND RELATED FACTORS

The Charts

The preparation of charts 6 to 14 comprised the plotting of the original statistics for the leading industries, excluding agriculture, for each province, for the years 1919 to 1947. The long-term trend was computed by the usual mathematical process.

A second type of analysis was utilized in charts 15 and 16. The net values were plotted on a semi-logarithmic rather than on an arithmetic scale. The charts consequently present the rate of change in the series rather than the absolute amount. The original data were plotted in charts 2 and 3, the changes in dollars for each series having been indicated by the height of the bars. Comparison from chart to chart is somewhat complicated by the variation in the scales.

The semi-logarithmic and the arithmetic scales are so dissimilar as to give quite different graphic descriptions of the same data. Equal vertical distances on the perpendicular axis of the semi-logarithmic chart represent equal percentage changes instead of the equal absolute magnitudes of the arithmetic scale.

The preparation of charts 17 and 18 involved a third process of analysis. An index number was computed by regarding the average from 1935 to 1939 as equivalent to 100. An average of the index was computed for the period 1938 to 1947. The average was shown as the zero line in each of the charts under consideration. The difference between the index on the base of 1935 to 1939 and the average from 1938 to 1947 was obtained for each year of the period. The standard deviation for each series resulted from taking the square root of the annual average of the sum of the squares of the differences. The differences divided by the standard deviation were plotted on the two charts. The purpose of the computation was to place the factors on a common footing in regard to the magnitude of the fluctuations from the averages of each.

STATE OF CALIFORNIA

IN SENATE

The Governor of the State of California, by and through the Attorney General, has the honor to acknowledge the receipt of your letter of the 10th inst. in relation to the proposed amendment to the Constitution of the State of California, and in reply to inform you that the same has been referred to the proper authorities for their consideration. It is the policy of the State to maintain the integrity of the Constitution and to prevent any change that would be detrimental to the public interest. The proposed amendment is being carefully reviewed and it is expected that a decision will be reached in due season. Your cooperation and patience in this matter are appreciated.

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