2-206 0

CANADA

DEPARTMENT OF TRADE AND COMMERCE

DOMINION BUREAU OF STATISTICS

CENSUS OF INDUSTRY

REPORT

ON THE

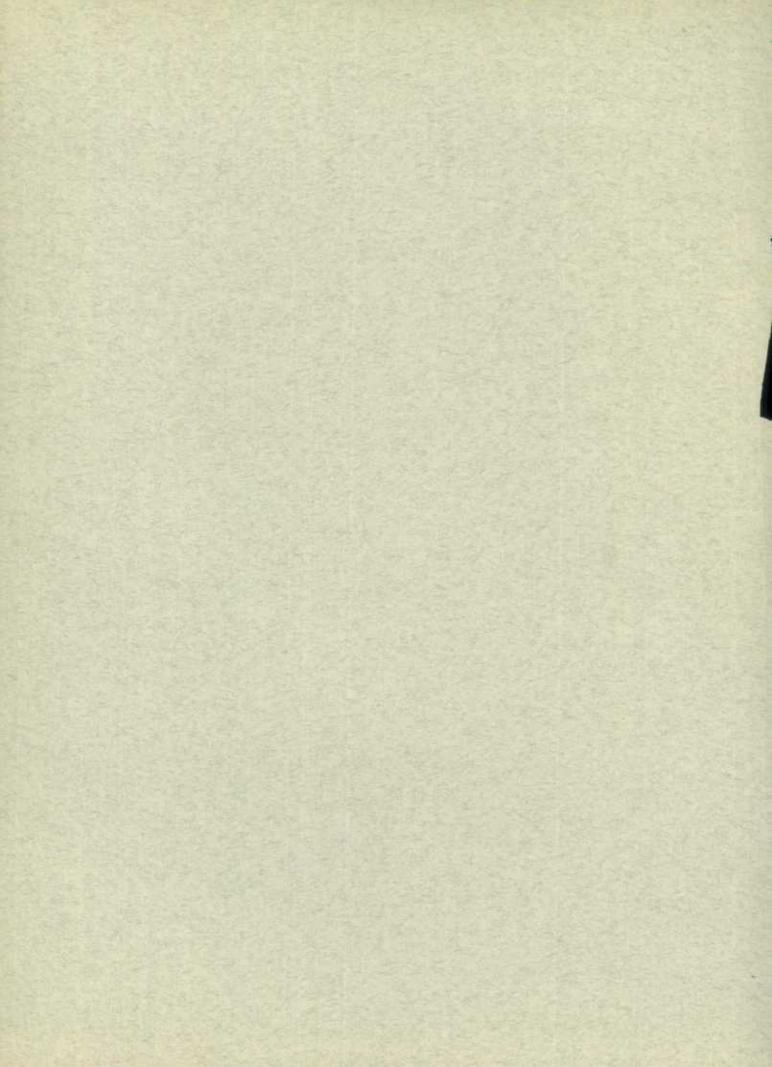
DISTILLED LIQUOR INDUSTRY

IN

CANADA

1932

Published by Authority of the HON. H. H. STEVENS, M. P., Minister of Trade and Commerce.



DEPARTMENT OF TRADE AND COMMERCE DOMINION BUREAU OF STATISTICS GENERAL MANUFACTURES DIVISION OTTAWA - CANADA

500 Copies October, 1933.

Dominion Statistician: R. H. Coats, B.A., F.S.S. (Hon.), F.R.S.C. Acting Chief, General Manufactures Division: A. Cohen, B.Com.

THE DISTILLED LIQUOR INDUSTRY IN CANADA, 1932.

The distilled liquor industry expanded from a production of \$3,296,545 in 1922 to \$43,752,420 in 1929, owing partly to the modification of prohibition laws in Canada and also to the fact that a large part of its production was exported directly or indirectly to the United States. Since 1930, however, due to the general depressed business conditions prevailing, the industry experienced considerable recession. The number of employees dropped from 2,219 in 1929 to 1,450 in 1932, salaries and wages from \$3,132,497 to \$1,757,244 and value of production from \$43,752,420 to \$11,349,269.

In 1932 there were twenty-one establishments reporting, eight in Quebec, ten in Ontario, one in Manitoba and two in British Columbia. Of these, eight did bottling only and one distilled wine spirits on commission. These twenty-one establishments in 1932 reported a capital investment of \$51,942,784, a payroll of 1,450 persons who received \$1,757,244 in salaries and wages, and had an output valued at \$11,349,269.

This industry performs three distinct operations, viz., (1) distillation of liquors which are stored away for at least two years for maturing and which are, therefore, not sold during the current year, (2) distillation of non-potable alcohol which may be sold during the year that it is produced and (3) bottling of matured liquors which have been produced in previous years. Several changes have, therefore, been made in the schedule since 1931 in order to show each of these operations more clearly as well as to show the value of new products made by the industry each year.

Whiskies and other potable spirits produced during the year and put in bond for maturing totalled 1,673,435 proof gallons with an inventory value of \$814,636, while whiskies and other potable spirits bottled or shipped in bulk totalled 3,783,337 proof gallons valued at \$12,390,842. Other important products were denatured alcohol 1,701,804 proof gallons valued at \$812,871 and non-potable alcohol 1,055,837 proof gallons valued at \$398,554. In order to avoid duplication, however, the prime cost of spirits produced in previous years and which were bottled or shipped in bulk during 1932 must be deducted from the value of production in order to arrive at the value of new products made by the industry in 1932. Detailed statistics of production are given in table 2.

Imports of distilled liquors in 1932 totalled 928,520 proof gallons with a value of \$15,515,754, this is a decrease of 587,454 proof gallons over 1931. Exports were valued at \$11,639,471, a decrease of \$821,458 as compared with 1931. Distilled liquors re-exported in 1932 were valued at \$1,434.

Detailed statistics of production, materials used, imports and exports, capital, employment, etc., are given in the tables following.

Table 1.	- Principal	Statistics,	by Provinces.	1927 to 1932.
or year law our personal property and the second statement of the second state	the same of the sa		and the state of t	

Table	1 Fr1	ncipal Stati	stics, by	Provinces,	Tax/ ro Tap	La .
	Estab- lish- ments		Employ-	Total Salaries and Wages		Gross Value of Products
	No.	\$	No.	\$	\$	\$
1927						
CANADA	17	37,528,954	1,401	1,895,084	6,351,689	25,660,985
Ontario	5	24,156,892	834	1,182,057	3,559,492	13,811,490
Quebec	7	8,824,874	401	500,129	1,861,525	8,386,316
Other Provinces	5	4,547,188	166	212,898	930,672	3,463,179
1928						
CANADA	18	51,287,103	1,884	2,560,459	10,137,114	38,423,743
Ontario	6	29, 255, 493	1,023	1,426,553	5,519,631	19,883,092
Quebec	7 5	16,121,529	623 238	846,562 287,364	3,371,496 1,245,987	15,268,267 3,272,384
Other Provinces	J	5,910,081	200	201,004	1,240,001	0, 212, 004
1929						
CANADA	20	60,211,220	2,219	3,132,497	12,928,920	43,752,420
Ontario	8	33,970,531	1,080	1,748,158	6,617,718	21,422,749
Quebec Other Provinces	7 5	18,579,738 7,660,951	895 244	1,076,020	4,919,884	20,312,104 2,017,567
Ouner Trovinces		7,000,501	€TX	000,015	1,001,010	2,011,001
1930						
CANADA	15	61,533,825	1,965	2,435,934	6,616,520	24,925,861
Ontario	5	33,431,130 19,956,998	844 867	1,199,137	3,187,644 2,843,332	10,523,480 13,419,753
Other Provinces	4	8,145,697	254	300,843	585,544	982,628
The state of the s				4 2 2 3 3 1		
1931 ^x						
CANADA	23	55,863,010	1.,822	2,223,477	5,463,753	13,055,971
Ontario	10	30,772,888 17,336,051	740 823	1,039,567	1,549,796 2,918,767	4,546,457 6,409,395
Other Provinces	5	7,754,071	259	319,581	995,190	2,100,119
1 9 3 2 ^x						
CANADA	21	51,942,784	1,450	1,757,244	3,321,569	11,349,269
Ontario	10	29,048,925	618	822,092	1,089,033	4,170,856
Quebec	8	15,556,053	586	656,351	1,348,394	5,021,633
Other Provinces	3	7,337,806	246	278,801	884,142	2,156,780

^{*} Includes bottling establishments which were previously excluded, 26.6%

Size of Establishments.

The tendency towards concentration in industrial enterprise is exemplified in a series of tables which present in a threefold way the size of establishments in

the distilled liquor industry measured by (a) capital investment, (b) value of production and (c) employment. The tables, compared for a number of years, further serve to indicate the movement of capital, production and employment within the industry.

In 1932 the establishments reporting numbered twenty-one with a total capital investment of \$51,942,784, a total value of production of \$11,349,269 and a total employment of 1,450 persons. Of the total number of establishments, four had a combined capital investment of \$36,191,521 or almost 70 per cent of the total invested in the industry and an average investment per establishment of \$9,047,880. In value of production three establishments had a combined output of \$6,084,890 or almost 54 per cent of the total for the industry and an average output per establishment of \$2,028,297. Of the total number of employees, six establishments had a combined payroll of 1,164 persons or 80 per cent of the total and an average employment per establishment of 194.

1	(a)	Capi	tal	Inve	stment.	1931	and	1932	,

		1931	and the same all and the same a	1 9 3 2			
Establishments having a Capital Investment of:	Estab- lish- ments Report- ing	Total Capital Invested	Average Capital per Estab- lishment	Estab- lish- ments Report- ing	Total Capital Invested	Average Capital per Estab- lishment	
	No.	\$	\$	No.	4	\$	
Under \$200,000 \$200,000 to under	8	916,464	114,558	8	897,364	112,170	
\$1,000,000 \$1,000,000 to under	6	3,078,037	513,006	4	1,389,478	347,369	
\$5,000,000	4	8,937,609	2,234,402	5	13,464,421	2,692,884	
\$5,000,000 and over	5	42,930,900	8,586,180	4	36,191,521	9,047,880	
Total	23	55,863,010	2,428,827	21	51,942,784	2,473,466	

(b) Production, 1931 and 1932,

		1931			1932	
Establishments having a Value of Production of:	Estab lish- ments Report- ing	Total Value of Production	Average Production per Estab- lishment	Estab- lish- ments Report- ing	Total Value of Production	Average Production per Estab lishment
	No.	\$	\$	No.	\$	\$
Under \$50,000 \$50,000 to under	9	171,311	19,035	5	108,696	21,739
\$200,000 \$200,000 to under	3	279,624	93,208	4	466,320	116,580
\$500,000	4	1,561,066	390,266	3	964,174	321,391
\$1,000,000	4	3,212,850	803,213	6	3,725,189	620,865
\$1,000,000 and over .	3	7,831,120	2,610,373	3	6,084,890	2,028,297
Total	23	13,055,971	567,651	2].	11,349,269	540,441

	(c) Employment, 1931 and 1932,						
		1931			1932		
Establishments having an Employment of:	Estab- lish- ments Report- ing	Total Employees	Average Employees per Estab- lishment	Estab- lish- ments Report- ing	Total Employees	Average Employees per Estab- lishment	
	No.	No	No	No	No	No.	
Under 20 employees . 20 to under 50	13	111	9	12	135	11	
employees	2	70	35	2	64	32	
employees	3	232	77	1	87	87	
employees	2	276	138	4	488	122	
200 employees and over	3	1,133	378	2	676	338	
Total ,	23	1,822	79	21	1,450	69	

Production.

Table 2.	Unit of	1 9		19	3 2	
roduction		Quantity	Value	Quantity	Value	
			\$		\$	
spirits, produced during the year, but put in bond			Y			
for maturing Non-potable alcohol Denatured alcohol	11 11	4,954,123 1,404,081 2,092,610	2,449,161 ^x 518,374 1,033,895	1,673,435	814,636 ^X 398,554	
Fusel oil	Gal.			1,701,804	812,871 2,012 34,115	
All other products			3 9 , 636	_	67,012	
bulk during current year.	Pf Gal	3,504,421	12,957,924	3,783,337	12,390,842	
Total Value of Production	n –	+0.1	17,079,010		14,520,042	
) Prime cost of spirits reported above under						
Section (c)	-	•	4,023,039	-0.0	3,170,773	
Net Value of Production.			13,055,971	-40	11,349,269	

Materials Used.

Table 3. - Materials Used, Canada, 1931 and 1932.

	Unit of	19	3 1	1932		
	Measure	Quantity	Cost Value	Quantity	Cost Value	
			\$		\$	
Corn	Lb.	26,344,567	395,925	12,963,361	150,548	
Rye	ff	38,918,444	457,207	12,521,398	110,975	
Other grains	11	196,180	2,815	_		
Malt X	11	15,526,128	352,831	5,315,816	106,557	
Molasses	11	70,358,227	607,580	44,606,000	315,845	
Water purchased	Gal.	91,861,000	15,655	118,897,000	15,901	
Denaturants	-	-	176,020	-	149,462	
Cooperage used for maturing	- 29		411,177	***	180,426	
Cooperage used for shipping	TI- HE		35,449	_	38,625	
Bottles			1,368,124	-	977,253	
Cases, wooden	-	_	356,684		214,308	
Cases, fibre	_	tale	20,661	-	45,327	
Other packaging material						
(labels, corks, etc.)	-	li tetti	1,219,012		979,726	
All other materials		_	44,613		36,616	
Total Cost of Materials	3 -	_	5,463,753	- 11	3,321,569	

x In 1931 the malt used was mostly Canadian and in 1932 it was all Canadian.

Capital Employed.

Table 4. - Capital Employed, 1927 to 1932.

	Fixed Capital Working Capital						
Years	Present value of lands, buildings, fixtures, machinery and tools etc.	Inventory value of materials, supplies, fuel, etc. on hand	Inventory value of finished products on hand	Cash, bills and accounts receivable etc.	Total Capital		
	\$	\$	\$	\$	\$		
1927 1928 1929 1930 1931	12,774,461 17,343,418 19,160,235 17,750,711 17,144,322 15,648,875	19,40 25,25 32,77 34,92 9,079,280 15,994,788	1,860 4,608 5,438 24,292,371	5,351,186 8,691,825 8,276,377 8,857,676 5,347,037 4,108,939	37,528,954 51,287,103 60,211,220 61,533,825 55,863,010 51,942,784		

Table 4. - Capital Employed by Provinces, 1931 and 1932. - (Concl'd.) Fixed Working Capital Capital Present value of Inventory Inventory value of value of Cash, bills lands. Total finished and accounts materials, buildings, receivable. Capital Provinces supplies, products fixtures, machinery fuel, etc. on hand etc. on hand and tools etc. \$ \$ \$ 403 \$ 1931 55,863,010 9,079,280 24,292,371 5,347,037 CANADA 17,144,322 30,772,888 12,254,272 2,174,158 9,466,706 6,877,752 Ontario 5,616,890 801,602 8,946,379 1,971,180 17,336,051 Quebec 2,060,726 1,399,926 3,091,720 1,201,699 7,754,071 Other Provinces 1 9 3 2 51,942,784 CANADA 15,648,875 15,994,788 16,190,182 4,108,939 8,745,492 6,943,132 11,673,274 1,687,027 29,048,925 Ontario 1,348,306 1,260,690 15,556,053 5,082,392 7,864,665 Quebec 3,168,602 7,337,806 1,186,991 1,161,222 Other Provinces 1,820,991

Employment Statistics.

	Table 5 Employees, Salaries and Wages, 1931 and 1932.									
	Emplo	yees on	Salaries	Empl	oyees on	Wages		al Emplo aries an	*	
Provinces	Male	Female	Salaries	Male	Female	Wages	Male	Female	Salaries and Wages	
	No.	No.	\$	No.	No.	\$	No.	No.	\$	
1931										
CANADA	260	60	918,951	1,040	462	1,304,526	1,300	522	2,223,477	
Ontario	136	41	489,698	398	165	549,869	534	206	1,039,567	
Quebec	76	16	294,572	540	191	569,757	616	207	864,329	
Other Province	s 48	3	134,681	102	106	184,900	150	109	319,581	
1932										
CANADA	279	48	868,279	767	356	888,965	1,046	404	1,757,244	
Ontario	123	26	414,069	3 36	133	408,023	459	159	822,092	
Quebec	113	20	337,274	327	126	319,077	440	146	656,351	
Other Province		2	116,936	104	97	161,865	147	99	278,801	

Table 6. - Wage-earners by Months and Sex, 1931 and 1932.

	1 9 3	1	1932		
Months	Male	Female	Male	Female	
No destruction of the second	No.	No.	No.	No.	
January	1,172	594	944	446	
February	1,122	504	871	474	
March	924	342	775	259	
April	906	336	819	424	
May	837	328	768	4.28	
June	891	391	724	351	
July	968	462	629	279	
August	1,094	426	763	249	
September	1,065	404	642	258	
October	1,107	491	691	315	
November	1,268	643	843	495	
December	1,148	593	725	275	
Average Number Employed					
during the Year	1,040	462	767	356	

Table 7. - Number of Wage-earners in Month of Highest Employment whose Regular
Hours of Work, per week, in 1932 were: -

Hours worked per week	CANADA	Ontario	Quebec	Other Provinces
	No.	No.	No.	No.
40 hours or less	213	211	2	
41-43 hours	10	10		DE AN INCLE
44 hours	485	246	32	207
45-47 hours	244	11	233	***
48 hours	208	34	32	142
49-50 hours	81	79	2	es.
51-53 hours	12	8	4	~
54 hours	5	2	3	
55 hours	326	2	324	4.
56-59 hours	21	1	6	14
60 hours	49	11	38	
Over 60 hours	43	16	27	5,007

The above table does not include overtime.

Table 8. - Power Equipment, 1931 and 1932.

Table 0.		9 3 1	1932		
Classes of Power	Number	Horse-power	Number	Horse-power	
	of Units	Capacity	of Units	Capacity	
Steam engines and turbines	53	4,851	53	4,844	
Gasoline, gas and oil engines	2	232	3	232	
Total Primary Power	55	5,083	56	5,076	
Electric motors operated by purchased power	785	4,703	766	4,567	
TOTAL POWER USED IN					
MANUFACTURING	840	9,786	822	9,643	
Electric motors operated by power					
generated in the establishment.	24	208	1.7	161	
Total Electric Motor					
Installation	809	4,911	783	4,728	
Boilers installed	56	13,681	54	13,662	

Fuel Consumption.

Table 9. - Fuel Consumption, 1931 and 1932.

	Unit of		3 1	1932		
Kinds of Fuel	Measure	Quantity	Cost Value	Quantity	Cost Value	
			\$		\$	
Bituminous coal Lignite coal		31,968	162,845 965	31,650	161,754	
Fuel oil	Gal.	3,000,665	142,523 2,700	1,659,861	77,402 750	
Other fuel			36,143		16,584	
Total Cost of Fuel Used	cond	ner	345,176		256,490	
Electricity purchased (including service charges)	K.W.H.	2,876,386	50,833	2,111,965	41,176	
Total Cost of Fuel and Electricity .	Nam		396,009	-	297,666	

Imports of Distilled Liquors.

Table 10. Imports of Distilled Liquors for the Calendar Years 1931 and 1932.

Articles Imported	Unit of	1 9	3 1	1 9	3 2
by Countries	Measure	Quantity	Value	Quantity	Value
			\$		\$
Absinthe and all spirituou	ıs				
alcoholic liquors,					
n.o.p Total	Pf. Gal.	475	1,173	1,293	22,534
United Kingdom	11 11		seld	1,122	22,199
China		435	920	171	335
France	11 19	27	183	· ·	_
Germany	99 11	13	70	-	apa
Brandy, all kinds Total	Pf. Gal.	233,286	1,647,477	166,416	1,234,833
United Kingdom	11 11	508	7,093	324	4,311
Australia	11 11	12	85	866	8,576
France		229,936	1,623,306	163,409	1,211,319
Other Countries	11 - 31	2,830	16,993	1,817	10,627
Cordials and Liqueurs of					
all kinds, n.o.p Total	. Pf. Gal.	34,223	240,979	18,776	141,670
United Kingdom		3,579	62,428	1,400	22,288
United States		14	85	7	44
France		22,765	143,836	12,960	100,034
Spain		411	2,607	124	803
Hong Kong		2,588	5,275	1,342	3,172
Netherlands		367	3,403	755	5,431
Other Countries	§§ \$9	4,499	23,345	2,188	9,898
Gin, all kinds Total	Pf. Gal.	245,288	3,425,751	132,777	1,901,703
United Kingdom	11 11	148,879	2,857,776	78,670	1,524,294
Netherlands		89,868	540,113	50,719	360,527
Belgium		6,223	26,826	3,307	16,435
France		22	112	80	439
Other Countries	11 11	296	924	1	8
Rum Total		214,570	2,983,651	128,065	1,893,878
United Kingdom		135,492	2,585,162	92,504	1,717,614
United States		108	255	-	
British Guiana		47,920	235,349	13,623	68,496
British West Indies		26,566	119,215	19,280	78,807
France		1,329	10,021	713	5,938
Cuba		3,094	33,294	1,927	22,943
Other Countries	11 21	61	355	18	80

Table 10 Imports of Disti	lled I	iquors	for the Ca	lendar Years	1931 and 193	2 (Concl'd.)
		of	1931		1 9 3 2	
by Countries	Measu	440-01	Quantity	Value	Quantity	Value
				\$		\$
Whiskey Total	Pf. C	Gal.	788,107	16,508,228	481,193	10,321,136
United Kingdom		11	,	16,490,711	478,727	10,285,989
France		11	117	1,386	206	3,411
Germany		11	823	11,240	2,105	29,442
Irish Free State		11	188	3,797	119	2,044
Other Countries		11	486	1,094	36	250
Total Imports of						
Distilled Liquors	Pf. (Gal.	1,515,949	24,807,259	928,520	15,515,754

Table 11. Exports of A) ticles Exported	Unit		1 9			3 2
by Countries	Meas		Quantity	Value	QuantityX	Value
				\$		\$
Dir	Std	Gal.	7,157	14,485	-	15,751
United Kingdom	n	11	10	74	14-7.0	
Panama	11	11	28	75		1,850
China	19	22	3,941	6,537	10.5	1,470
St. Pierre and Miquelon	27	11	3,000	7,000		1,575
Hong Kong	97	11	3	7		1,523
French Oceania	- 11	- 11	98	500	-	9,278
Other Countries	11	H	77	292	and a	55
Moto?	0+3	Col	9 554 695	12,445,106		11,623,716
Whiskey Total	pua.	Gal.	2,554,625	58,402		75,165
United Kingdom	11	11	15,247	50,402		15,500
British Guiana	11	11	160,133	961,507		508,566
British Honduras	- 11	11	4,538	15,017		11,376
China	11	11	281,099	1,538,217		582,730
British West Indies	- 11	17	1,352	5,965		8,443
Cuba	11	11	1,792	7,948		12,817
Honduras	11	11	119,438	631,520		714,143
Bermuda	17	11	1.805.139	8,441,741		8,342,651
St. Fierre and Miquelon.	11	- 11	315	1,465		212,890
Belgium	11	11	7,715	18,275		109,485
Panama	- 11	11	117,127	608,500		932,866
French Oceania	11	31	16,530	66,115	Louis President	40,892
France	- 11	11	3,768	12,773		2,608
Philippine Islands	11	11	4,227	20,427		12,688
Other Countries	11	19	16,205	57,234	a	40,896

Table 11. - Exports of Distilled Liquors the Produce of Canada, 1931 and 1932. - (Concl'd.)

Articles Exported	Unit of .	of 1931		1932	
by Countries	Measure	Quantity	Value	QuantityX	Value
			\$		\$
Other potable spirits,					
n.o.p	Std, Gal.	516	1,338	-	4
France		-		-	4
Philippine Islands	n n	37	200		The second second
French Oceania	H H	451	1,026		
Other Countries	n n	28	112		
GRAND TOTAL	11 11	2,562,298	12,460,929		11,639,471

^{*} Quantity not available for calendar year 1932 as unit of measure was changed during the year from standard gallons to proof gallons.

Table 12. - Exports of Alcoholic Beverages, the Produce of Foreign Countries,

	Unit of	1 9	3 1	1 9	3 2
Articles Exported by Countries	Measure	Quantity	Value	Quantity	Value
			\$		\$
Whiskey Total	Pf. Gal.	103	2,324	-	1,053
United Kingdom	11 11	103	2,324	9004	1,053
Other alcoholic beverages Total	Pf. Gal.	87	670	A spore	381
United Kingdom	tt tt	12	73	ENT TO S	58
France	11 11	44	457	** **	31.7
Other Countries	ti II	31	140		6
GRAND TOTAL	tt et	190	2,994	4000	1,434

List of Distilleries Operating in Canada in 1932.

Quebec

Distillers Corporation Limited,

Eastern Distilleries Limited,

Campbell's Distillery (Canada) Limited,

Meagher Bros. & Company Limited,

Melchers Distilleries Limited,

Montreal Products Company Limited,

National Distilleries Limited,

3196 Notre Dame Street East, Montreal. Ville LaSalle.
3142 Notre Dame Street East, Montreal.
6659 Park Avenue, Montreal.
1161 Britannia Street, Montreal.
Berthierville.
1410 Montmorency Street, Montreal.
501 St. Joseph Street, Lachine.

These distilleries produced no new liquous in 1932, but bottled and sold products made

List of Distilleries Operating in Canada in 1932 (Concl'd.)

Ontario

Barclay, Jas. & Company Limited, Niagara Falls Canadian Industrial Alcohol Company Limited, Corbyville Grimsby (Distilling Wine Spirits) Dunrobin Limited. Gooderham & Worts Limited, 2 Trinity Street, Toronto. / Highland Scotch Distilleries Limited. Humberstone. / Lindsay Distilleries Limited, Lindsay. / Pioneer Distillers Limited. Amherstburg. / Sarnia Distillers Limited, Sarnia. / Seagram, Joseph E. & Sons Limited, Waterloo. / Walker, Hiram & Sons Limited, Walkerville.

Manitoba

Mid-West Distillers Limited,

542 Plinquet Street, St. Boniface

British Columbia

British Columbia Distillery Company Limited, 109 Braid Street, New Westminster United Distillers Limited, 8900 Shaughnessy Street, Vancouver

These distilleries produced no new liquors in 1932, but bottled and sold products made in previous years.

000	

