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CANADA
DEPARTMENT OF TRADE AND COMMERCE
DOMINION BUREAU OF STATISTICS
CENSUS OF INDUSTRY
GENERAL MANUFACTURES BRANCH

REPORT
ON THE
DISTILLED LIQUOR INDUSTRY
IN
CANADA
1937



OTTAWA
1939

Price 25 cents

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

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THE DISTILLED LIQUOR INDUSTRY IN CANADA, 1937.

In 1937 there were seventeen establishments engaged in the production of distilled liquor, five in Quebec, nine in Ontario and three in British Columbia. These seventeen establishments in 1937 reported a capital investment of \$34,563,076, a payroll of 2,041 persons who received \$2,427,508 in salaries and wages, and had a net value of production of \$24,756,012.

This industry performs three distinct operation, namely, (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.

Whiskies and other potable spirits produced during the year and put in bond for maturing totalled 4,860,247 proof gallons with an inventory value of \$2,831,394, while whiskies and other potable spirits bottled or shipped in bulk totalled 8,492,538 proof gallons valued at \$37,396,006. Other important products were: denatured alcohol 2,642,150 proof gallons valued at \$1,090,521 and non-potable alcohol 2,727,609 proof gallons valued at \$2,006,116. In order to avoid duplication, however, the prime cost of spirits produced in previous years and bottled or shipped in bulk during 1937, must be deducted from the value of production in order to arrive at the value of new products made by the industry in 1937. Detailed statistics of production are given in Table 2.

Imports of distilled liquors in 1937 totalled 1,315,926 proof gallons with a value of \$6,843,569. This is an increase of 234,290 proof gallons over 1936. Exports, amounting to 5,384,615 gallons, were valued at \$21,004,471, an increase of 351,627 gallons but a decrease in value of \$1,392,831 as compared with 1936.

The apparent consumption of spirits in Canada in 1937 totalled 3,303,559 proof gallons as follows:

	<u>Proof Gal.</u>	
Matured spirits sold during the year	8,492,538	
Add imports	<u>1,315,926</u>	9,808,464
Deduct exports	5,384,615	
Intercompany shipments	<u>1,120,290</u>	<u>6,504,905</u>
Apparent consumption		<u>3,303,559</u>

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

THE DISTILLED LIQUOR INDUSTRY IN CANADA, 1937.

Table 1. - Principal Statistics, by Provinces, 1932 to 1937.

Year and Provinces	Estab-lish-ments	Capital Invested	Em-ployees	Salaries and Wages	Cost of Materials Used	Net Value of Production
	No.	\$	No.	\$	\$	\$
<u>1 9 3 2</u> ^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
<u>1 9 3 3</u> ^x						
CANADA	17	53,316,284	1,394	1,615,833	3,655,641	10,463,099
Ontario	9	31,026,815	672	802,922	1,547,846	5,182,516
Quebec and British Columbia	8	22,289,469	722	812,911	2,107,795	5,280,583
<u>1 9 3 4</u> ^x						
CANADA	17	47,980,630	1,643	1,812,945	3,185,958	12,230,113
Ontario	9	27,361,813	840	962,138	1,700,136	7,211,569
Quebec and British Columbia	8	20,618,817	803	850,807	1,485,822	5,018,544
<u>1 9 3 5</u> ^x						
CANADA	16	42,045,051	1,580	1,913,271	3,014,348	16,114,361
Ontario	9	24,638,684	795	1,058,491	1,651,508	7,201,677
Quebec and British Columbia	7	17,406,367	785	854,780	1,362,840	8,912,684
<u>1 9 3 6</u> ^x						
CANADA	16	37,987,604	1,968	2,303,698	4,743,377	20,196,185
Ontario	8	22,530,977	1,049	1,295,526	2,916,006	12,180,852
Quebec	5	10,775,547	684	708,033	1,319,738	6,785,879
British Columbia ..	3	4,681,080	235	300,139	507,633	1,229,454
<u>1 9 3 7</u> ^x						
CANADA	17	34,563,076	2,041	2,427,508	7,039,910	24,756,012
Ontario	9	18,822,681	1,104	1,396,723	3,780,791	15,354,038
Quebec	5	11,659,526	711	723,374	2,747,920	7,524,129
British Columbia ..	3	4,080,869	226	307,411	511,199	1,877,845

x

Includes bottling establishments.

THE DISTILLED LIQUOR INDUSTRY IN CANADA - 1937.

Table 2. - Production - 1936 and 1937

Production		Unit of Measure	1936		1937	
			Quantity	Value \$	Quantity	Value \$
A. Spirits produced during the year but placed in bond for maturing.	Whiskey: Rye type ..	Prf. gal.	5,772,258	1,924,603 ^x	2,894,160	2,088,768 ^x
	Other types ..	" "			1,277,012	463,622 ^x
	Brandy, Gin and other spirits	" "			689,075	279,004 ^x
B. Matured spirits sold during the year, either bottled or in bulk, including purchases from other firms.	Whiskey: Scotch type ..	" "	6,756,772	24,009,160	208,511	2,044,142
	Rye type ..	" "			5,938,436	25,983,652
	Other types ..	" "			1,538,479	4,647,998
	Brandy	" "			18,974	82,146
	Gin	" "			644,338	4,370,441
	Other spirits	" "			143,800	267,627
C. Non-potable alcohol		" "	1,693,078	768,350	2,727,609	2,006,116
Denatured alcohol		" "	2,405,371	1,069,853	2,642,150	1,090,521
Wine spirits distilled for wineries		" "	1/	1/	1/	1/
Fusel oil		Gallon	11,392	10,683	15,162	8,189
Distiller's grains		-	-	76,667	-	162,932
All other products		-	-	166,442	-	242,145
Total Value of Production ..			-	28,025,758	-	43,737,503
D. Deductions 2/						
(a) Prime cost of spirits of own manufacture produced in previous years included above under Section "B"			-	7,829,573	-	9,183,115
(b) Sales tax and other duties included in above selling values			-	3/	-	9,798,176
Net Value of Production			-	20,196,185	-	24,756,012

^x. These are "inventory values". All others are "selling values" at the distillery.

1/ Less than 3 firms reporting, included under "All other products".

2/ See Table 3 (Section C) for cost of spirits purchased from other firms.

3/ Selling values reported in 1936 were exclusive of taxes, duties, etc.

THE DISTILLED LIQUOR INDUSTRY IN CANADA - 1937.

Table 3 - Materials Used, 1936 and 1937.

Table 3 - Materials used, 1936 and 1937.					
Materials	Unit of Measure	1936		1937	
		Quantity	Cost Value \$	Quantity	Cost Value \$
A. Materials used for distillation: -					
Corn, - Canadian	Pound	3,906,059	47,513	(61,699,831	950,500
Imported	"	44,956,801	557,720		
Rye	"	8,550,245	118,961	11,675,598	237,750
Other grains	"	287,344	3,637	350,882	6,048
Malt, Canadian	"	8,464,066	220,921	9,938,177	337,363
Sugar	"	23,353	1,137	107,405	5,861
Molasses	"	87,334,896	676,279	89,100,996	676,929
Water purchased	Gallon	174,397,000	22,915	158,732,000	22,689
Yeast	Pound	48,064	4,806	43,948	3,518
Denaturants: -					
Wood Alcohol	Gallon	130,923	96,986	144,486	111,096
Other	-	-	48,419	-	40,043
Cooperage used for					
maturing	-	-	157,127	-	146,949
All other materials ..	-	-	126,047	-	67,192
B. Materials used for bottling: -					
Bottles, - Canadian ..	-)	-	1,365,626 (-	1,192,539
Imported ..	-)	-		-	140,187
Cases, wooden	-	-	42,792	-	13,092
Cases and cartons other than wood	-	-	139,120	-	155,479
Cooperage used as shipping containers ..	-	-	147,362	-	127,715
Other packaging materials (labels, corks, etc.)	-	-	966,009	-	837,200
C. Matured liquors purchased for bottling, blending, etc.: -					
Whiskey:					
Scotch type, Canadian	Prf. Gal.)			(8,319	23,608
Scotch type, Imported	" ")			(79,615	332,404
Rye type, Canadian	" ")			(656,172	1,110,860
Other types, "	" ")			(325,154	326,099
Other types (incl. rye) imported	" ")			(13,942	57,908
Brandy: - Imported	" ")	1/	1/	(8,345	38,886
Liqueurs, cordials, etc.: - Imported	" ")			(4,284	17,870
Other spirits: Can. ..	" ")			(20,874	15,447
Other spirits: Imp. ..	" ")			(3,585	21,777
Other alcohol (including non-potable and matured)	" ")			(56,949	22,901
TOTAL COST OF MATERIALS			4,743,377	-	7,039,910

1/ Distillers were not required to report these items prior to 1937.

THE DISTILLED LIQUOR INDUSTRY IN CANADA, 1937.

Size of Establishments

A series of tables is presented showing 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 indicate the movement of capital, production and employment within the industry.

In 1937 the establishments reporting numbered seventeen, with a total capital investment of \$34,563,076, a total net value of production of \$24,756,012 and a total employment of 2,041 persons. Of the total number of establishments, three had a combined capital investment of \$19,349,908 or almost 56 per cent of the total invested in the industry and an average investment per establishment of \$6,449,969. In value of production, six establishments had a combined output of \$21,228,420 or almost 86 per cent of the total for the industry and an average output per establishment of \$3,538,070. Of the total number of employees, six establishments had a combined payroll of 1,674 persons or over 82 per cent of the total and an average employment per establishment of 279.

(a) Capital Investment, 1936 and 1937.

Establishments having a Capital Investment of:	1936			1937		
	Estab- lish- ments	Total Capital	Average Capital per estab- lishment	Estab- lish- ments	Total Capital	Average Capital per estab- lishment
	No.	\$	\$	No.	\$	\$
Under \$1,000,000	8	4,145,811	518,226	9	3,814,711	423,857
\$1,000,000 to under \$4,000,000	5	12,454,639	2,490,928	5	11,398,457	2,279,691
\$4,000,000 and over .	3	21,387,154	7,129,051	3	19,349,908	6,449,969
TOTAL AND AVERAGE ...	16	37,987,604	2,374,225	17	34,563,076	2,033,122

(b) Production, 1936 and 1937.

Establishments having a Value of Production of:	1936			1937		
	Estab- lish- ments	Total Production	Average Production per estab- lishment	Estab- lish- ments	Total Production	Average Production per estab- lishment
	No.	\$	\$	No.	\$	\$
Under \$100,000	3	116,271	38,757	3	77,043	25,681
\$100,000 to under \$500,000	7)	3,352,680	419,085	5	1,610,815	322,163
\$500,000 to under \$1,000,000	1)			3	1,839,734	613,245
\$1,000,000 and over .	5	16,727,234	3,345,447	6	21,228,420	3,538,070
TOTAL AND AVERAGE ...	16	20,196,185	1,262,262	17	24,756,012	1,456,236

THE DISTILLED LIQUOR INDUSTRY IN CANADA, 1937.

(c) Employment, 1936 and 1937.

Establishments having an Employment of:	1936			1937		
	Estab- lish- ments	Total Employees	Average Employees per estab- lishment	Estab- lish- ments	Total Employees	Average Employees per estab- lishment
	No.	No.	No.	No.	No.	No.
Under 20 employees ..	3	41	14	3	22	7
20 to under 50 employees	5	(5	136	27
50 to under 100 employees	2	(302	43	3	209	70
100 to under 200 employees	4	(1,625	271	4	(1,674	279
200 employees and over	2			2		
TOTAL AND AVERAGE ..	16	1,968	123	17	2,041	120

Table 4. - Capital Employed, 1931 to 1937.

Year	Fixed Capital	Working Capital			Total Capital
	Present value of land, buildings, fixtures, machinery, tools, etc.	Materials on hand, Stocks in process, Fuel and Mis- cellaneous supplies, etc.	Inventory value of finished products on hand	Cash, bills and accounts receivable, Prepaid expenses, etc.	
	\$	\$	\$	\$	\$
1931	17,144,322	9,079,280	24,292,371	5,347,037	55,863,010
1932	15,648,875	15,994,788	16,190,182	4,108,939	51,942,784
1933	14,690,714	17,541,311	14,239,290	6,844,969	53,316,284
1934	13,333,790	12,039,194	16,338,660	6,268,986	47,980,630
1935	11,693,530	25,828,296		4,523,225	42,045,051
1936	10,904,879	21,641,681		5,441,044	37,987,604
1937	10,231,736	19,698,410		4,632,930	34,563,076

THE DISTILLED LIQUOR INDUSTRY IN CANADA, 1937.

Table 4. - Capital Employed, by Provinces, 1936 and 1937. - (Concl'd.)

Year and Provinces	Fixed Capital	Working Capital		Total Capital
	Present value of land, buildings, fixtures, machinery, tools, etc.	Inventory value of materials on hand, stocks in process, finished products, fuel and miscellaneous supplies on hand	Cash, bills and accounts receivable, Prepaid expenses, etc.	
	\$	\$	\$	\$
1936				
CANADA	10,904,879	21,641,681	5,441,044	37,987,604
Ontario	6,443,050	12,747,671	3,340,256	22,530,977
Quebec	2,975,588	6,157,575	1,642,384	10,775,547
British Columbia ..	1,486,241	2,736,435	458,404	4,681,080
1937				
CANADA	10,231,736	19,698,410	4,632,930	34,563,076
Ontario	6,133,979	10,426,352	2,262,350	18,822,681
Quebec	2,922,581	7,219,652	1,517,293	11,659,526
British Columbia ..	1,175,176	2,052,406	853,287	4,080,869

Table 5. - Employees, Salaries and Wages, 1936 and 1937.

Provinces	Employees on Salaries			Employees on Wages			Total Employees on Salaries and Wages		
	Male	Female	Total	Male	Female	Total	Male	Female	Total
	No.	No.	\$	No.	No.	\$	No.	No.	\$
1936									
CANADA	399	104	992,231	931	534	1,311,467	1,330	638	2,303,698
Ontario	251	73	556,680	490	235	738,846	741	308	1,295,526
Quebec	118	26	351,338	342	198	356,695	460	224	708,033
British Columbia ..	30	5	84,213	99	101	215,926	129	106	300,139
1937									
CANADA	444	121	1,065,689	976	500	1,361,819	1,420	621	2,427,508
Ontario	257	88	585,262	518	241	811,461	775	329	1,396,723
Quebec	149	29	368,170	352	181	355,204	501	210	723,374
British Columbia ..	38	4	112,257	106	78	195,154	144	82	307,411

THE DISTILLED LIQUOR INDUSTRY IN CANADA, 1937.

Table 6. - Wage-earners by Months and Sex, 1936 and 1937.

Months	1 9 3 6		1 9 3 7	
	Male	Female	Male	Female
	No.	No.	No.	No.
January	988	487	1,070	443
February	1,032	643	975	404
March	973	483	950	410
April	812	447	951	404
May	858	474	930	501
June	809	380	926	460
July	888	501	928	468
August	782	401	876	566
September	852	460	859	372
October	970	558	979	530
November	1,080	761	1,119	687
December	1,131	803	1,168	733
AVERAGE NUMBER EMPLOYED DURING THE YEAR.	931	534	976	500

Table 7. - Number of Wage-earners in Month of Highest Employment whose Regular Hours of Work, per Week, in 1937 were:

Hours Worked per Week	CANADA	Ontario	Quebec	British Columbia
	No.	No.	No.	No.
40 hours or less	67	21	45	1
41 - 43 hours	25	14	11	-
44 hours	930	770	9	151
45 - 47 hours	44	6	33	5
48 hours	226	42	92	92
49 - 50 hours	370	18	352	-
51 - 53 hours	37	12	25	-
54 hours	62	2	60	-
55 hours	78	4	74	-
56 - 59 hours	133	77	56	-
60 hours and over	75	27	48	-

The above table does not include overtime.

THE DISTILLED LIQUOR INDUSTRY IN CANADA, 1937.

Table 8. - Power Equipment, 1936 and 1937.

Classes of Power	1 9 3 6		1 9 3 7	
	Number of Units	Horse-power Capacity	Number of Units	Horse-power Capacity
Steam engines and turbines -				
In use	39	4,186	39	4,186
Idle	6	335	6	335
Gasoline, gas and oil engines	1	246	1	246
Total Primary Power	46	4,767	46	4,767
Electric motors operated by purchased power -				
In use	750	3,668	758	3,708
Idle	24	640	29	659
TOTAL POWER AVAILABLE FOR MANUFACTURING	820	9,075	833	9,134
Electric motors operated by power generated in the establishment	161	2,140	153	2,162
Total Electric Motor Installation	783	4,311	940	6,529
Boilers installed	49	12,457	52	12,541

Table 9. - Fuel Consumption, 1936 and 1937.

Kinds of Fuel	Unit of Measure	1 9 3 6		1 9 3 7	
		Quantity	Cost Value	Quantity	Cost Value
			\$		\$
Bituminous coal	Ton	49,114	270,521	47,398	255,038
Fuel oil	Gallon	1,617,100	70,771	1,934,623	90,889
Other fuel	-	-	25,418	-	28,838
TOTAL COST OF FUEL USED	-	-	366,710	-	374,765
Electricity purchased (including service charges)	Kw. H.	3,792,208	49,260	3,469,765	45,868
TOTAL COST OF FUEL AND ELECTRICITY	-	-	415,970	-	420,633

THE DISTILLED LIQUOR INDUSTRY IN CANADA, 1937.

Table 10. - Imports of Distilled Liquors for the Calendar Years 1936 and 1937.

	1936		1937	
	Quantity	Value	Quantity	Value
	Pf. Gal.	\$	Pf. Gal.	\$
Brandy, all kinds	131,073	876,237	159,746	860,031
Gin, all kinds	75,697	268,897	85,427	296,384
Rum	222,351	2,181,465	280,891	1,265,201
Whiskey	635,203	3,280,638	768,866	4,277,024
Cordials and liqueurs of all kinds, n.o.p.	17,312	136,983	20,455	141,879
Absinthe, arrack or palm spirit and all spirituous or alcoholic liquors, n.o.p.			541	3,050
TOTAL IMPORTS OF DISTILLED LIQUORS	1,081,636	6,744,220	1,315,926	6,843,569

Table 11. - Exports of Distilled Liquors, the Produce of Canada, 1936 and 1937.

	1936		1937	
	Quantity	Value	Quantity	Value
	Pf. Gal.	\$	Pf. Gal.	\$
Gin	4,109	8,163	2,362	5,843
Whiskey	5,028,773	22,388,116	5,380,317	20,993,002
Other potable spirits, n.o.p. ..	106	1,023	1,936	5,626
TOTAL EXPORTS OF DISTILLED LIQUORS, THE PRODUCE OF CANADA	5,032,988	22,397,302	5,384,615	21,004,471

Table 12. - Exports of Alcoholic Beverages, the Produce of Foreign Countries, 1936 and 1937.

	1936		1937	
	Quantity	Value	Quantity	Value
	Pf. Gal.	\$	Pf. Gal.	\$
TOTAL EXPORTS OF ALCOHOLIC BEVERAGES, THE PRODUCE OF FOREIGN COUNTRIES		6,267		1,949

THE DISTILLED LIQUOR INDUSTRY IN CANADA, 1937.

A P P E N D I X

List of Distilleries Reporting in 1937.

QUEBEC

Commercial Alcohols Limited,
Distillers Corporation Limited,
Meagher Brothers & Company Limited,
Melchers Distilleries Limited,
Montreal Products Company Limited,

3176 Notre Dame Street East, Montreal.
Ville La Salle.
1161 Britannia Street, Montreal.
Berthierville.
1410 Montmorency Street, Montreal.

ONTARIO

Barclay, Jas., & Company Limited,
Canadian Industrial Alcohol Co. Limited,
Dunrobin Limited,
Gilbey, W. & A., Limited,
Gooderham & Worts Limited,
Pioneer Distillers Limited,
Seagram, Joseph E., & Sons Limited,
Walker, Hiram, & Sons Limited,
McGuinness, L. J. & Co. Limited,

Niagara Falls.
Corbyville.
Grimsby.
New Toronto.
2 Trinity Street, Toronto.
Amherstburg.
Waterloo.
Walkerville.
Riverside.

BRITISH COLUMBIA

British Columbia Distillery Co. Limited,
United Distillers Limited,
Pacific Coast Distillers, Limited,

105 Braid Street, New Westminster.
8900 Shaughnessy Street, Vancouver.
1654 Franklin Street, Vancouver.

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