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**A REVIEW OF  
THE CANADIAN  
MILLWORK INDUSTRY**

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# **A REVIEW OF THE CANADIAN MILLWORK INDUSTRY**

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# INTRODUCTION





## INTRODUCTION

This report is a review of the Canadian millwork industry, defined here as the aggregate of all establishments primarily engaged in manufacturing products such as doors and door frames, windows and sash, interior millwork and construction mouldings, as well as plants engaged principally in the manufacture of pre-cut or prefabricated wooden buildings, laminated rafters, roof trusses and beams. Firms that manufacture millwork as a secondary activity are excluded but, as Table 1 indicates, such plants typically account for only a small percentage of the total value of millwork produced in Canada.

Statistics and other data relating to various aspects of the millwork industry as defined above are presented and described in this report but analytic comment on this material is limited.

The principal source of data in this review is Statistics Canada (formerly the Dominion Bureau of Statistics). Material from official U.S. publications is also presented for purposes of comparison and is acknowledged where appropriate. The reader is advised that such comparisons are of an approximate nature inasmuch as the U.S. statistics are based on a slightly different set of definitions than the Canadian data and, of course, are expressed in U.S. dollars.

The statistics used in this review are the latest available at the time of writing. It is considered probable, considering the business climate during the interval, that well-established trends have continued and that the facts as presented for the 1960s have relevance to present circumstances.

TABLE 1

**VALUE OF SHIPMENTS OF PRINCIPAL MILLWORK PRODUCTS FROM THE CANADIAN  
MILLWORK INDUSTRY AND FROM ALL INDUSTRIES IN CANADA — 1969**

<u>Product</u>	Value of Shipments From All Industries (own mfr.)	Value of Shipments From Mill- Work Industry (own mfr.)	Percentage of Shipments From Mill- Work Industry (own mfr.)
	<u>(\$000)</u>	<u>(\$000)</u>	<u>%</u>
Wooden Flush-Type Doors . . . . .	33,983	33,767	99
Wooden Pre-Hung Doors . . . . .	4,818	4,565	95
Wooden All Other Doors . . . . .	14,491	13,974	96
Wooden Windows and Sash . . . . .	42,252	40,674	96
Wooden Window or Door Frames . . . . .	8,009	7,231	90
Wooden Kitchen Units or Cabinets . . . . .	46,090	37,652	82
Laminated Structures . . . . .	13,058	11,319	87
Wooden Mouldings . . . . .	27,760	22,527	81
Prefabricated Buildings . . . . .	144,858	92,769	64
<b>Total . . . . .</b>	<b><u>388,611</u></b>	<b><u>316,784</u></b>	

Source: Statistics Canada Catalogue 35-205 "Sash, Door and Other Millwork Plants", Annual Census of Manufactures.

## DEFINITION OF TERMS

The data used in this report is drawn primarily from Statistics Canada publications.<sup>1</sup> Thus, an understanding of some of the terms and symbols employed by Statistics Canada is required. The following list should be adequate for this purpose.

### Symbols:

- .. figures not available
- ... figures not appropriate or not applicable
- nil or zero
- X figures withheld to conform to the secrecy requirements of the Statistics Act.

### Terms:

#### Establishment

Usually a plant or mill, an establishment is defined as "the smallest unit which is a separate operating entity capable of reporting the following principal statistics: materials and supplies used, goods purchased for resale as such, fuel and power consumed, number of employees and salaries and wages, man-hours worked and paid, inventories, shipments and sales."<sup>2</sup>

#### Value of shipments, own manufacture

These figures represent the value of goods made from materials owned either by the reporting establishment or by other manufacturers on the basis of a charge to the reporting establishment for work done. They are expressed net of discounts, returns, allowances, sales and excise taxes. Included are revenues from repair and custom work.

#### Value of shipments, total activity

These are aggregate figures and include the value of shipments of own manufacture, the value of shipments from non-manufacturing activities (i.e. goods transferred on a resale basis), and other operating revenues. Not included are non-operating revenues such as rents, dividends and interest.

#### Value added, own manufacture

These figures are used to express the difference between the value of shipments of own manufacture corrected for changes in inventory and the cost of manufacturing materials and supplies including fuel and electricity consumed in production activities.

<sup>1</sup>Due to recent changes in the definition of the millwork industry made by Statistics Canada, published data on this sector's activities is available only for the period 1961 — 1969.

<sup>2</sup>Official Statistics Canada definition.

## SUMMARY

1. In 1969 the Canadian millwork industry reported factory shipments of \$330,063,000 from 922 plants employing 15,332 workers.
2. Ninety per cent of the establishments classified to this industry are located in Quebec, Ontario, British Columbia and Alberta.
3. The number of millwork plants that are organized as individual proprietorships or partnerships and employ two workers or less is declining in both absolute and relative terms. Nevertheless, such firms made up 40 per cent of the number of establishments in 1969.
4. Sixteen per cent of the millwork firms in Canada handled 75 per cent of the industry's factory shipments in 1969.
5. Between 1963 and 1969 female employment in this industry increased by 63 per cent as compared to only 11 per cent for men. This was due to increasing use of women as production workers in the more highly mechanized plants.
6. In the period covered in this review, wages and salaries in the Canadian millwork industry were lower on the average than in the United States millwork industry or in all Canadian manufacturing industries.
7. Lower salaries and wages roughly compensated for the lower relative productivity of labour employed in this industry between 1961 and 1969.
8. Domestic consumption of millwork appears to have increased substantially during the 1960s in line with the strong (116 per cent) increase in factory shipments from the millwork industry between 1961 and 1969. Rapid growth in demand occurred in Ontario, British Columbia, Alberta, Manitoba, Nova Scotia and New Brunswick.
9. Canadian export trade in millwork during the 1960s was extremely small in relation to total sales from the millwork industry.
10. Problems shared to some extent by all millwork firms in Canada include the increasing use of substitute (i.e. man-made) materials in building construction, uncertainty as to future levels of demand and fluctuating materials costs.

**THE STRUCTURE OF THE  
CANADIAN MILLWORK INDUSTRY**



#### A. Geographical Location of Production

Millwork establishments are found in each of Canada's 10 provinces and in the Yukon. Their distribution corresponds roughly to provincial population with the greatest number of plants being found in Québec (although Ontario leads in value of production) followed by Ontario, British Columbia and Alberta. In 1969 there were 922 firms engaged principally in the manufacture of millwork in Canada. Approximately 90 per cent of these establishments were located in the four provinces listed above. (See *Chart 1* for further details on the provincial distribution of establishments, employment and shipments in 1969.)

Within the provinces, the millwork industry is oriented toward the major centres of population. In Ontario, for example, nearly 65 firms out of a provincial total of 260 were located within the Metropolitan Toronto area in 1970, the latest year for which a list of establishments was available. In Quebec that year approximately 103 establishments out of a total of 326 were situated in or near Montreal. Refer to *Appendix J* for a complete listing of establishments classified to the millwork industry in 1970.

While access to major markets is no doubt an important locational consideration in the millwork industry, other factors such as the availability and cost of labour also come into play especially for larger firms. Also, a significant number of long-established millwork firms find themselves somewhat removed from today's major markets, but the expense and inconvenience of moving outweigh the advantages of relocation.

#### B. Specialization Within the Industry

No published data is available to indicate the extent to which Canadian millwork firms specialize in certain product lines. Such data is published in the United States and is presented in Appendix C2 to indicate the high degree of specialization among millwork plants in that country. However, no inferences concerning the state of the industry in this country should be drawn from this data. In fact, it would be true to say that unlike the situation that prevails in the United States, the majority of establishments classified to the millwork industry in Canada do not specialize in particular products.

#### C. Concentration of Production Among Firms

As is the case in many other sectors of the Canadian economy, a small proportion of millwork manufacturers accounts for a large percentage of the industry's total production. In 1969, 148 firms, 16 per cent of the national total, reported factory shipments of \$247,040,000 or 75 per cent of the total value of shipments. At the other end of the scale, establishments whose individual shipments were valued at less than \$50,000 made up 40 per cent of the total number of firms in the industry in 1969 and yet accounted for only 5 per cent of the total value of shipments.

*Table 2* is presented to illustrate what appears to be an increasing trend in the Canadian millwork industry towards concentration of business among larger firms. For example, in 1963 only six establishments reported shipments of more than \$1,000,000. By 1969, this increased to 76 even though there were fewer firms overall classified to the millwork industry. Similarly, the percentage of firms whose shipments totalled less than \$25,000 declined sharply (from 58 per cent to 26 per cent) between 1963 and 1969.

#### D. Organization of Firms

The traditional structure of the Canadian millwork industry has been that of a large number of small privately owned firms supplying the general millwork requirements of a limited local market. While this description of the industry is no longer entirely valid, there is still a significant number of millwork establishments that are organized as individual proprietorships or partnerships and employ at the most two production workers. In 1969, such firms made up over 40 per cent of the industry but accounted for only 5 per cent of total shipments (See *Table 3*).

The number of individual proprietorships and partnerships in the millwork industry is declining both in absolute terms and in relation to the number of firms organized as corporations. One may speculate that this decline is attributable primarily to withdrawals from the industry, but there is no published data to support this view.

#### **E. Capital Structure of the Industry**

Capital and repair expenditures by the Canadian millwork industry during the period 1965 — 1969 are presented in *Table 4*. As indicated, these expenditures increased from \$9,001,000 in 1965 to \$15,700,000 in 1969, or 74 per cent in five years.

If capital outlays as a percentage of total factory shipments is used as the basis for comparison, establishments in the millwork industry spend only about one-half as much overall on acquiring or repairing capital goods and equipment as their counterparts in all other manufacturing sectors in Canada. Between 1965 and 1969 capital expenditures as a percentage of shipments in both the Canadian millwork industry and in all manufacturing industries considered as a group remained relatively constant, the former at between four to five per cent and the latter at nine to ten per cent.



TABLE 2

CLASSIFICATION OF ESTABLISHMENTS IN THE CANADIAN MILLWORK INDUSTRY  
BY VALUE OF SHIPMENTS OF OWN MANUFACTURE<sup>1</sup>  
1969

Value of Shipments per Establishment	Establishments		Production Workers <sup>2</sup>		Administrative, Office and Sales Employees		Total Value of Shipments	
\$	Number	% of Total	Number	% of Total	Number	% of Total	\$000	% of Total
Less than — 10,000 .....	103	11	3	neg.	1	neg.	515	neg.
10,000 — 24,999 .....	141	15	82	1	13	neg.	2,439	1
25,000 — 49,999 .....	130	14	240	2	39	1	4,729	1
50,000 — 99,999 .....	119	13	473	4	101	3	8,733	3
100,000 — 199,999 .....	135	15	926	8	262	8	19,376	6
200,000 — 499,999 .....	146	16	2,121	18	618	19	47,231	14
500,000 — 999,999 .....	72	8	2,138	19	644	19	52,099	16
1,000,000 — 4,999,999 .....	68	7	4,060	35	1,161	35	134,346	41
More than — 5,000,000 .....	8	1	1,501	13	490	15	60,595	18
	922	100	11,544	100	3,329	100	330,063	100
1963								
Less than — 10,000 .....	359	35	108	1	13	1	3,125	2
10,000 — 24,999 .....	235	23	535	6	91	4	7,906	5
25,000 — 49,999 .....	133	13	807	9	205	8	10,511	6
50,000 — 99,999 .....	119	12	1,153	12	312	12	18,934	12
100,000 — 199,999 .....	79	8	1,635	18	515	21	26,653	16
200,000 — 499,999 .....	72	7	2,786	30	737	29	49,557	30
500,000 — 999,999 .....	20	2	1,495	16	461	18	29,109	18
1,000,000 — 4,999,999 .....	6	neg.	779	8	180	7	18,278	11
More than — 5,000,000 .....	—	—	—	—	—	—	—	—
	1,023	100	9,298	100	2,514	100	164,073	100

<sup>1</sup>Source: Supplement to Statistics Canada Catalogue #35-205 "Sash, Door and Other Millwork Plants" Annual Census of Manufactures

<sup>2</sup>Does Not Include Working Owners or Partners

TABLE 3

CLASSIFICATION OF ESTABLISHMENTS IN THE CANADIAN MILLWORK INDUSTRY  
BY TYPE OF ORGANIZATION<sup>1</sup>

Type of Organization	1969	Value of	1966	Value of	1963	Value of
	Number	Shipments, Own Manufacture (\$000)	Number	Shipments, Own Manufacture (\$000)	Number	Shipments, Own Manufacture (\$000)
Individual Ownerships .....	326	11,248	387	10,582	506	12,299
Partnerships .....	74	6,817	84	3,827	99	4,395
Incorporated Companies And Co-Operatives .....	522	311,999	473	219,411	418	147,379
	922	330,064	944	233,766	1,023	164,073

<sup>1</sup>Source: Supplement to Statistics Canada Catalogue #35-205 "Sash, Door and Other Millwork Plants", Annual Census of Manufactures.

TABLE 4

**CAPITAL AND REPAIR EXPENDITURES MADE BY THE  
CANADIAN MILLWORK INDUSTRY 1965-1969<sup>1</sup>**  
(\$000)

Year	Capital			Repair			Total Capital and Repair Expenditures	Total Expenditures As a Portion of Value of Shipments <sup>2</sup>	
	Construction	Machinery & Equipment	Total Capital Expenditures	Construction	Machinery & Equipment	Total Repair Expenditures		Millwork Industry	All Manufacturing Industries
1969 . . . .	5,200	7,400	12,600	900	2,200	3,100	15,700	4.8%	—
1968 . . . .	2,353	4,522	6,875	980	2,400	3,380	10,255	3.8%	8.2%
1967 . . . .	3,778	5,127	8,905	687	2,273	2,960	11,865	4.7%	9.5%
1966 . . . .	3,666	5,643	9,309	611	1,988	2,599	11,908	5.1%	10.8%
1965 . . . .	2,735	3,736	6,471	503	2,027	5,530	9,001	4.8%	9.8%

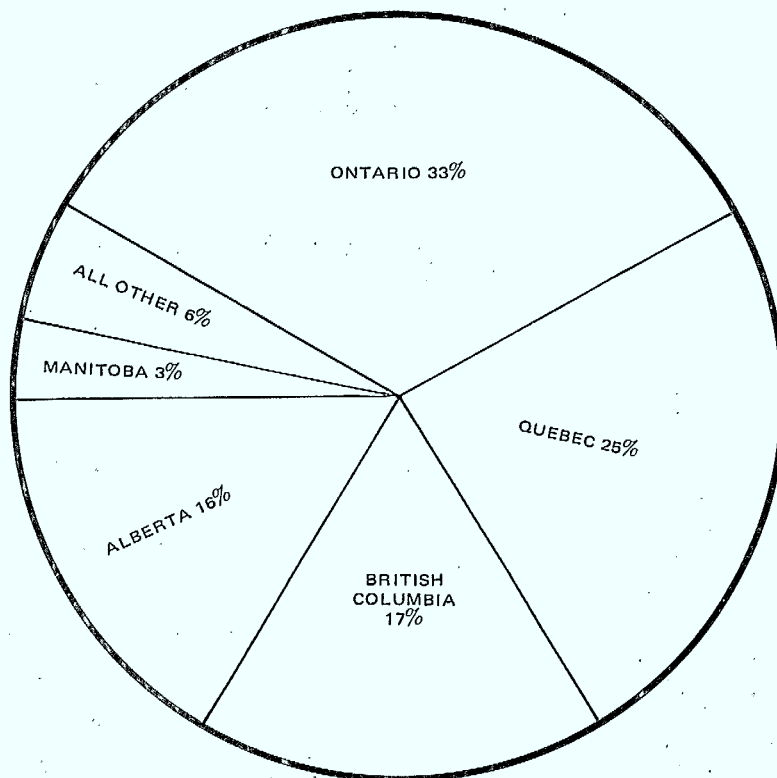
<sup>1</sup>Source: "Capital and Repair Expenditures Manufacturing Industries — All Canada Totals", Supplements Prepared in Capital Expenditures Section, Business Finance Division, Statistics Canada

<sup>2</sup>Compiled by the Department of Industry, Trade and Commerce, Wood Products Branch

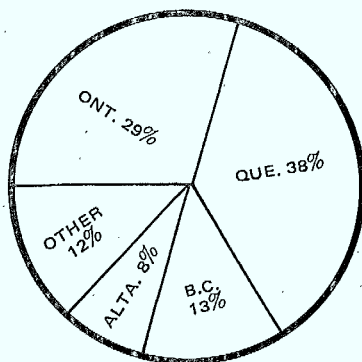
Chart 1

PROVINCIAL DISTRIBUTION OF THE CANADIAN MILLWORK INDUSTRY — 1969

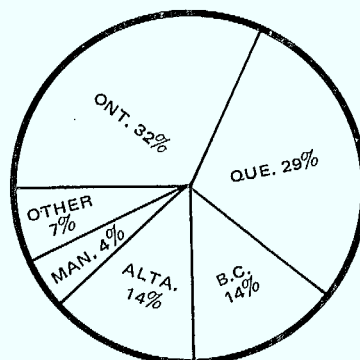
VALUE OF SHIPMENTS



NUMBER OF ESTABLISHMENTS



NUMBER OF EMPLOYEES



SOURCE: APPENDIX B3

**EMPLOYMENT IN THE  
CANADIAN MILLWORK INDUSTRY**



#### **A. Recent Growth in Employment**

Despite small year-to-year fluctuations, employment in the Canadian millwork industry increased between 1961 and 1969. If working owners and partners are included, the labour force in the industry grew from 12,907 in 1961 to 15,332 in 1969, an increase of 19 per cent. *Chart 2* illustrates employment trends in the Canadian and United States millwork industries and in all Canadian manufacturing industries in recent years.

Employment in this industry exhibits no stable pattern of growth on a provincial basis. As *Table 5* indicates, only Ontario, which is the leading province in terms of employment, registered a steady increase in the number of men and women employed in millwork establishments between 1963 and 1969.

#### **B. Seasonal Pattern of Employment**

Although no published data is available, it is accepted that employment in this industry does show some seasonal variation due to slowdowns in construction activity in Canada during the winter months. Some sectors of the millwork industry, particularly those oriented primarily to residential as opposed to architectural millwork, are generally more subject to these seasonal fluctuations.

#### **C. Composition of the Labour Force**

Not surprisingly, given the relatively heavy nature of the work, women do not represent a significant proportion of the production labour force in the millwork industry. If clerical positions are not considered, there were approximately 28 times as many men employed in the millwork industry as there were women in 1969. Nevertheless, women have increased their participation in manufacturing activities, as *Table 6* shows. Some of the larger, more mechanized millwork plants, particularly those engaged in the manufacture of doors and/or windows, report that they have expanded their staff of female production workers substantially in recent years.

Millwork plants in Ontario employed the most women as production workers in 1969, followed by establishments in Alberta and Manitoba. Female employment in manufacturing was practically negligible in Quebec in that year. These statistics suggest that on the whole, millwork plants in Ontario, Alberta and Manitoba are comparatively more mechanized than establishments elsewhere in Canada.

#### **D. Distribution of Employees by Activity**

As indicated in *Table 7*, approximately three-quarters of the men and women employed in the Canadian millwork industry are engaged directly in the production process. This means that clerical, administrative and sales personnel form a somewhat larger segment of total employees in this industry than in all wood products industries in Canada or in the United States millwork industry, although not as large as in all Canadian manufacturing industries considered as a group. From the data in *Table 7*, it would appear that production workers accounted for a relatively constant share of total employment in the Canadian millwork industry between 1961 and 1969.

#### **E. Wages and Salaries**

Generally, labour employed directly in manufacturing activities in the Canadian millwork industry ranges from unskilled to semi-skilled. On the average, these employees earn less per year than their counterparts in other wood products industries in Canada or in other Canadian manufacturing industries. Similarly, annual wages paid to production workers in the United States millwork industry tend to exceed by a considerable margin yearly wages in the millwork industry in Canada. In 1967, for example, production workers in the Canadian millwork industry averaged \$4,313 per employee, while similar workers in the United States

averaged \$5,100. In the same year manufacturing employees in all Canadian wood products industries and in all Canadian manufacturing industries earned an average of \$4,709 and \$5,022 respectively.

In 1967, the latest year for which complete comparisons can be made, wages in the domestic millwork industry averaged \$1.98 per hour compared with \$2.57 per hour in the United States millwork industry. Production workers in all Canadian manufacturing and in all Canadian wood products industries taken as a group were paid an average hourly wage of \$2.36 and \$2.20 respectively in 1967.

Lower salary scales also prevail in the Canadian millwork industry for administrative, clerical and sales personnel. In 1967, these employees earned an average of \$6,680 while similar employees in the United States millwork industry were paid an average salary of \$9,200. Comparable figures for non-production employees in all Canadian wood products industries and all Canadian manufacturing industries were \$6,960 and \$6,991 respectively.

*Table 8* summarizes the growth in average annual incomes for employees in the Canadian and United States millwork industries and in all Canadian manufacturing and wood products industries.

#### **F. Organization of Labour Within the Industry**

No published information is available to indicate the extent to which labourers in the millwork industry are unionized. It is thought that the use of union labour is most common in the larger millwork plants, particularly in establishments located in or near major urban centres.



TABLE 5

PROVINCIAL DISTRIBUTION OF LABOUR EMPLOYED IN THE  
CANADIAN MILLWORK INDUSTRY 1963-1969<sup>1</sup>

	<u>Year</u>	<u>Ontario</u>	<u>Quebec</u>	<u>Alberta</u>	<u>British Columbia</u>	<u>Manitoba</u>	<u>Saskatchewan</u>	<u>New Brunswick</u>	<u>Nova Scotia</u>	<u>All Other Provinces &amp; The Yukon</u>	<u>Total Canada</u>
25	1969 .....	4,954	4,412	2,119	2,112	684	279	343	313	116	15,332
	1968 .....	4,831	4,152	2,134	1,918	652	360	288	271	140	14,746
	1967 .....	4,547	4,207	2,436	1,984	659	391	260	299	115	14,898
	1966 .....	4,370	4,095	2,089	1,841	636	231	269	326	206	14,063
	1965 .....	4,141	4,374	1,139	1,833	639	310	283	342	100	13,161
	1964 .....	4,140	4,232	1,042	1,898	694	293	290	341	108	13,038
	1963 .....	3,796	4,209	1,027	1,812	626	293	255	392	127	12,537

<sup>1</sup>Source: Statistics Canada Catalogue #35-205, "Sash, Door and Other Millwork Plants" Annual Census of Manufactures . . . Includes Working Owners and Partners

**TABLE 6**  
**THE CANADIAN MILLWORK INDUSTRY**  
**COMPOSITION OF THE LABOUR FORCE, 1963-1969<sup>1</sup>**

Year	TOTAL ACTIVITY			MANUFACTURING ACTIVITY				CLERICAL, DISTRIBUTION & SALES			
	Male	Female	Ratio	Male	Female	Ratio	Male	Female	Ratio	Male	Female
1969 .....	14,216	1,116	13:1	11,634	413	28:1	2,582	703	4:1		
1968 .....	13,576	1,170	12:1	10,977	442	25:1	2,599	728	4:1		
1967 .....	13,780	1,118	12:1	11,169	435	26:1	2,611	683	4:1		
1966 .....	12,990	1,073	12:1	10,750	420	26:1	2,240	653	3:1		
1965 .....	12,261	901	14:1	10,052	314	32:1	2,208	587	4:1		
1964 .....	12,226	812	15:1	10,445	273	38:1	2,231	539	4:1		
1963 .....	11,852	685	17:1	9,838	182	54:1	2,014	503	4:1		

**COMPOSITION OF THE LABOUR FORCE IN THE CANADIAN MILLWORK INDUSTRY BY PROVINCE<sup>1</sup>**  
**1969**

Province	PRODUCTION WORKERS				CLERICAL, ADMINISTRATIVE AND SALES PERSONNEL			
	Male	Female	Ratio	Male	Male	Female	Ratio	Male
Quebec .....	3,467	27	128:1	731	185	4:1		
Ontario .....	3,552	233	15:1	848	285	3:1		
British Columbia .....	1,667	37	45:1	321	87	4:1		
Alberta .....	1,526	86	18:1	423	81	5:1		
All Other Provinces .....	1,378	30	46:1	259	65	4:1		

<sup>1</sup>Source: Statistics Canada Catalogue #35-205 "Sash, Door and Other Millwork Plants", Annual Census of Manufactures

**TABLE 7**  
**EMPLOYEES ENGAGED DIRECTLY IN MANUFACTURING**  
**ACTIVITY AS A PROPORTION OF TOTAL EMPLOYEES 1961-1969<sup>1</sup>**

<u>Year</u>	<u>Canadian Millwork Industry<sup>2</sup></u> %	<u>All Canadian Wood Products Industries<sup>3</sup></u> %	<u>All Canadian Manufacturing Industries<sup>4</sup></u> %	<u>U.S. Millwork Industry<sup>5</sup></u> %
1969 .....	78	..	..	..
1968 .....	77	86	71	..
1967 .....	78	87	71	81
1966 .....	79	87	72	79
1965 .....	78	86	71	80
1964 .....	79	86	71	79
1963 .....	80	84	71	80
1962 .....	79	85	71	84
1961 .....	77	83	70	83

<sup>1</sup> Compiled by the Department of Industry, Trade and Commerce, Wood Products Branch

<sup>2</sup> Source: Appendix B1

<sup>3</sup> Source: Statistics Canada Catalogue #31-203 "Manufacturing Industries of Canada, Section A — Summary for Canada"

<sup>4</sup> Source: As above

<sup>5</sup> Source: Appendix C1

Note: All Employees Figures for Canada Include Working Owners and Partners

TABLE 8

AVERAGE ANNUAL INCOME PER EMPLOYEE<sup>1</sup>

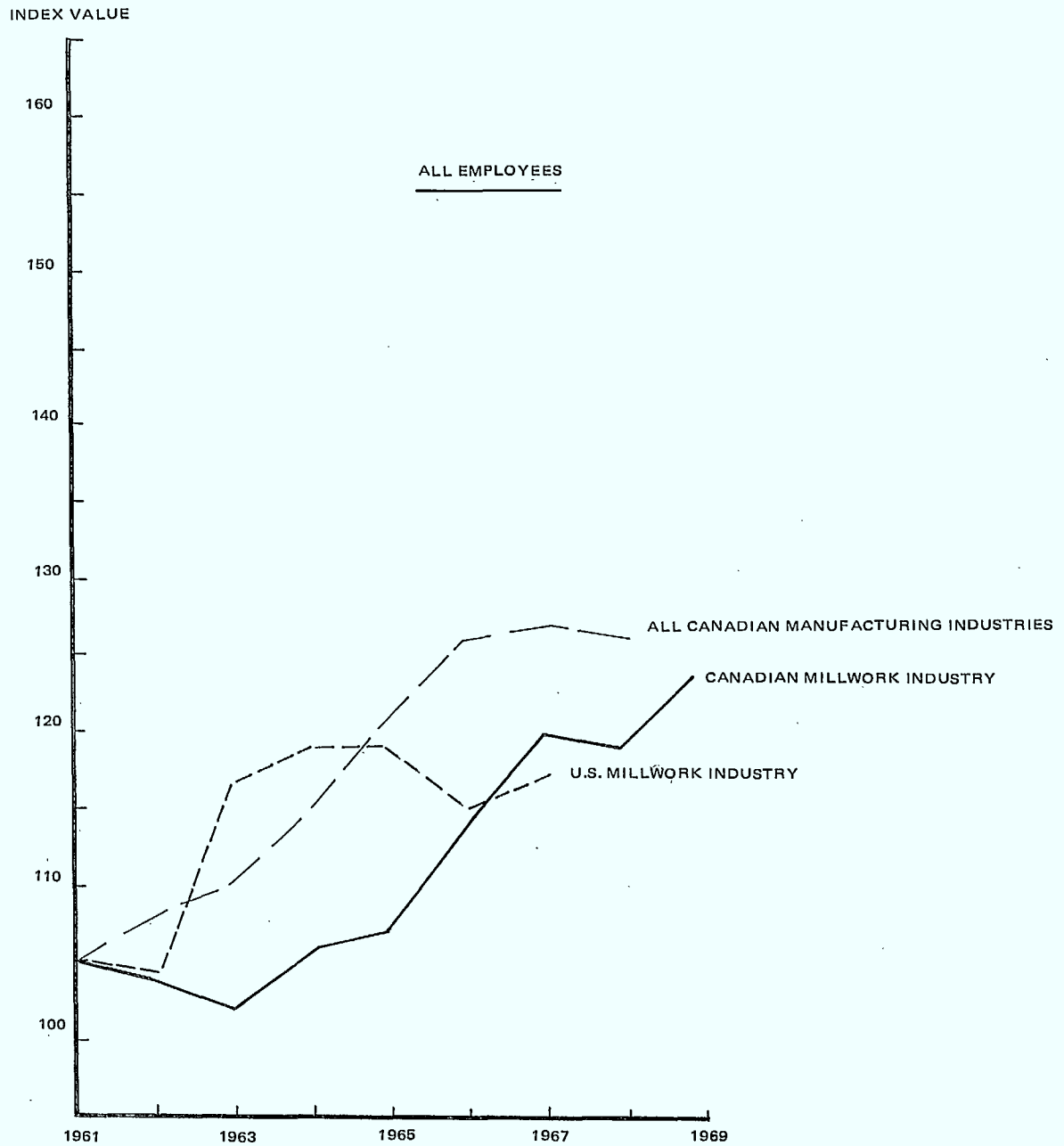
Year	PRODUCTION WORKERS				ADMINISTRATIVE, OFFICE AND SALES WORKERS			
	Canadian Millwork Industry <sup>2</sup>	Canada, All Manufacturing Industries <sup>3</sup>	All Canadian Wood Products Industries <sup>3</sup>	U.S. Mill- work Industry <sup>4</sup>	Canadian Millwork Industry <sup>2</sup>	Canada, All Manufacturing Industries <sup>3</sup>	All Canadian Wood Products Industries <sup>3</sup>	U.S. Mill- work Industry <sup>4</sup>
1969 .....	5,129	..	..	..	7,637	..	..	...
1968 .....	4,594	5,411	5,104	..	7,082	7,523	7,459	..
1967 .....	4,304	5,022	4,709	5,100	6,680	6,991	6,960	9,200
1966 .....	4,090	4,753	4,400	4,800	6,202	6,596	6,325	7,900
1965 .....	3,744	4,492	4,111	4,700	5,464	6,185	5,811	7,700
1964 .....	3,599	4,268	3,869	4,500	5,052	5,919	5,477	6,900
1963 .....	3,378	4,081	3,704	4,400	5,017	5,687	5,052	6,900
1962 .....	3,213	3,935	3,528	4,000	4,850	5,448	4,855	8,900
1961 .....	3,125	3,761	3,350	3,900	4,522	5,249	4,569	8,400

<sup>1</sup>Compiled by the Department of Industry, Trade and Commerce, Wood Products Branch<sup>2</sup>Source: Appendix B1<sup>3</sup>Source: Statistics Canada Catalogue #31-203 "Manufacturing Industries of Canada", Summary for Canada 1967<sup>4</sup>Source: Appendix C1 ... figures are rounded to nearest \$100.

Chart 2

Employment

INDEX TRENDS IN THE CANADIAN AND AMERICAN MILLWORK INDUSTRIES AND ALL CANADIAN MANUFACTURING INDUSTRIES (1961 = 100)



SOURCE: APPENDIX F1



**RECENT PERFORMANCE  
OF THE MILLWORK INDUSTRY**





### A. Growth in Sales

The sales record of the Canadian millwork industry during the period covered in this review is impressive. The value of shipments of own manufacture increased from \$152,556,000 in 1961 to \$330,064,000 in 1969, or by 116 per cent in eight years. This compares favourably with the growth rate achieved by all manufacturing industries in Canada and exceeds that of the United States millwork industry. Reference should be made to *Chart 3* for a year-to-year comparison of sales growth among these industry groups.

The growth described above is perhaps more apparent than real. The Canadian millwork industry increased its selling prices substantially between 1961 and 1969 with the result that values of shipments reported in this period are inflated. If value of shipments figures are calculated in terms of constant 1961 prices, the increase in sales between 1961 and 1969 falls from 116 per cent to only 49 per cent. In *Table 9* the value of shipments figures in actual and constant dollars are presented for purposes of comparison.

**TABLE 9**  
**VALUE OF SHIPMENTS OF OWN MANUFACTURE FROM THE**  
**CANADIAN MILLWORK INDUSTRY 1961-1969<sup>1</sup>**

Year	Actual Dollar Value	Value in Terms of 1961 Prices
1969 .....	330,064	227,317
1968 .....	270,109	207,776
1967 .....	254,524	204,437
1966 .....	233,766	196,939
1965 .....	189,058	169,407
1964 .....	185,461	173,328
1963 .....	164,073	158,525
1962 .....	158,358	156,480
1961 .....	152,556	152,556

<sup>1</sup>Source: Appendices B1 and B2

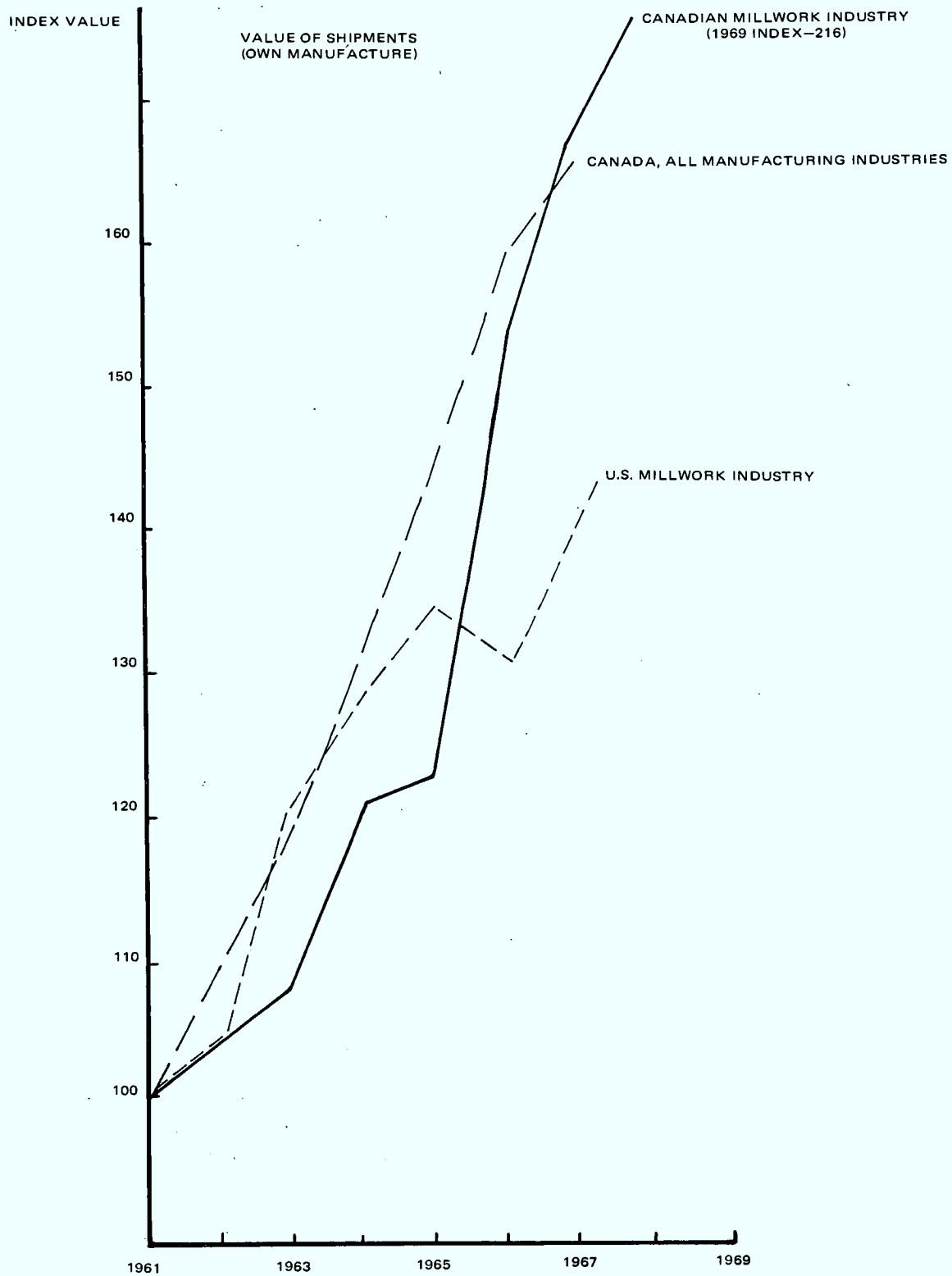
### B. Productivity Within the Industry

As mentioned, the Canadian millwork industry has made notable advances in sales as measured by the increase in the value of factory shipments. The parallel increase in gross production (i.e. the value of goods of own manufacture at the plant) is outlined in *Table 10*. It is noted that output increased by 118 per cent from \$153,589,000 in 1961 to \$334,678,000 in 1969. Along with this increase in gross output there was an increase in the number of production workers from 9,900 to 12,003 or 21 per cent. The growth in production was accomplished primarily by an 80 per cent increase in output per production worker.

In *Table 11* two of the most common measures of an industry's physical productivity — gross production per production worker and factory shipments per employee — are presented for the Canadian millwork industry, all Canadian manufacturing and wood products industries and the United States millwork industry.

Chart 3

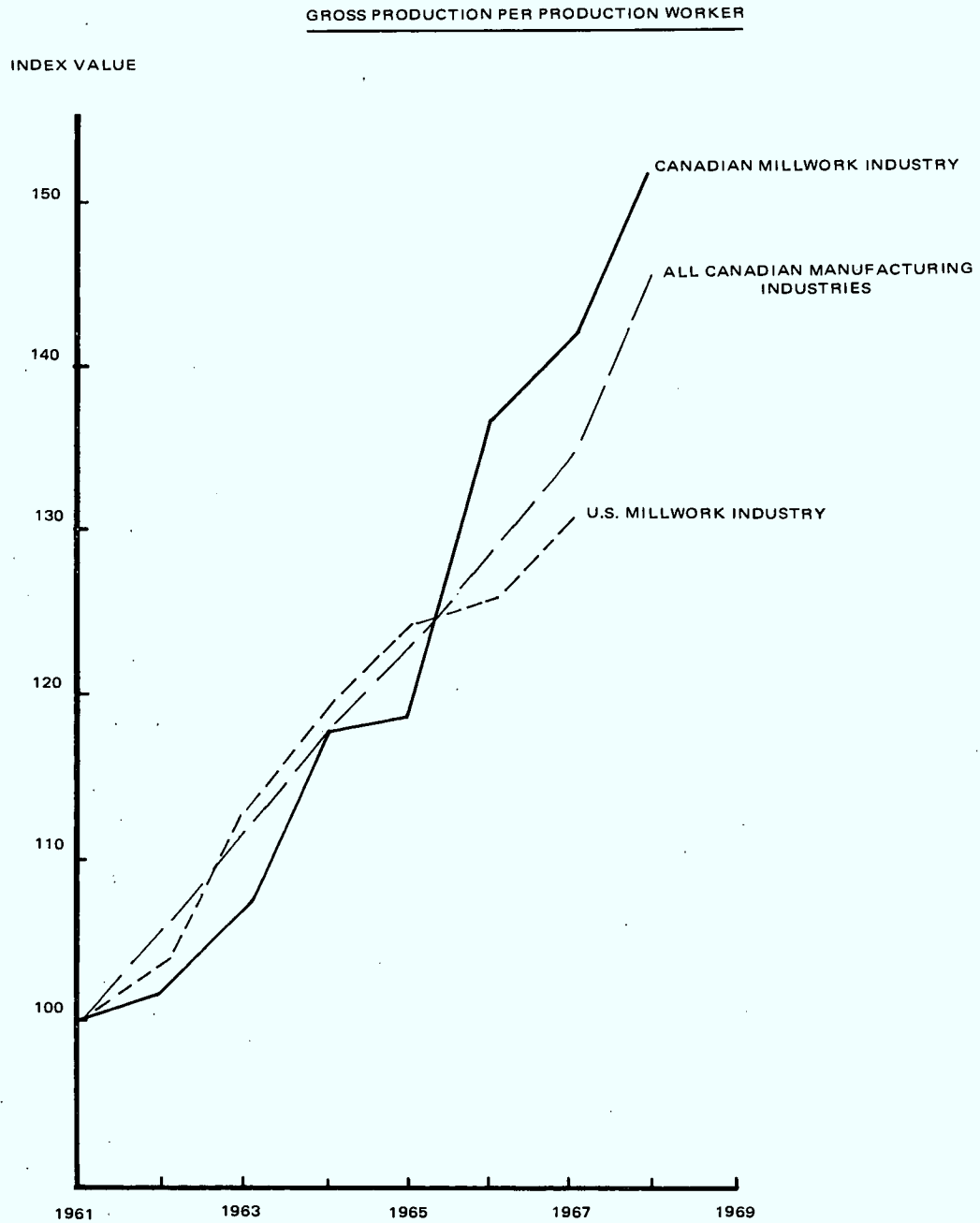
INDEX TRENDS IN THE CANADIAN AND AMERICAN MILLWORK INDUSTRIES AND ALL CANADIAN MANUFACTURING INDUSTRIES (1961 = 100)



SOURCE: APPENDIX F1

Chart 4

INDEX TRENDS IN THE CANADIAN AND AMERICAN MILLWORK INDUSTRIES AND ALL CANADIAN MANUFACTURING INDUSTRIES (1961 = 100)



SOURCE: APPENDIX F2

**TABLE 10**  
**PRODUCTION OF MILLWORK PRODUCTS BY THE CANADIAN MILLWORK INDUSTRY<sup>1</sup>**  
**1961 – 1969**

Year	Output <sup>2</sup> (\$000)
1969	334,678
1968	271,023
1967	255,791
1966	235,726
1965	189,953
1964	187,349
1963	165,206
1962	159,193
1961	153,589

<sup>1</sup>Source: Statistics Canada Catalogue #35-205 "Sash, Door and Other Millwork Plants" Annual Census of Manufactures

<sup>2</sup>Compiled by the Department of Industry, Trade and Commerce, Wood Products Branch

Labour productivity in the Canadian millwork industry between 1961 and 1969 as measured by gross production per production worker lagged well behind that in the United States millwork industry and all Canadian manufacturing establishments considered as a group, but compared favourably with productivity in the domestic wood products sector. In 1969, each worker engaged directly in manufacturing in the Canadian millwork industry accounted for an average value of production of slightly less than \$28,000. *Chart 4* outlines the recent growth in gross output per production worker in the Canadian and United States millwork industries and in all Canadian manufacturing industries. (Note that productivity figures for the United States industry are inflated because they do not include working owners and partners.)

The productivity gap between the Canadian and United States millwork industries and between the Canadian millwork industry and the domestic wood products sector widens if the figures for factory shipments per employee are used as the basis for comparison. This is due to the fact that non-production employees formed a somewhat larger segment of the labour force in this industry between 1961 and 1969 than they did in the other two industry groups.

Physical productivity of labour is at best only a rough guide to an industry's performance. Low wages and salaries can more than compensate for low output or sales per employee. Accordingly, gross production and factory shipments are related directly to wages and total payroll in the second section of *Table 11*.

With its generally lower wage scales, the millwork industry compares well with other wood products industries in Canada on the basis of gross production per \$1,000 of wages. Similarly, the wide gap in productivity between labour employed in the Canadian and United States millwork industries narrows appreciably when the higher wages paid in the United States are considered. It is interesting to note that when output is related to labour costs in this way little year-to-year variation is seen. This would indicate that increases in the physical productivity of labour tend to be matched fairly closely by increases in salaries and wages in the industry groups considered.

Another useful statistic in comparing productivity between industry groups is value added per employee. Value added was defined at the beginning of this report as the difference between the value of shipments of

TABLE 11

## LABOUR PRODUCTIVITY (\$)¹

Year	GROSS PRODUCTION PER PRODUCTION WORKER (OWN MANUFACTURE)				FACTORY SHIPMENTS PER EMPLOYEE (OWN MANUFACTURE)			
	Canadian Millwork Industry²	All Canadian Manufacturing Industries³	All Canadian Wood Products Industries³	U.S. Millwork Industry⁴	Canadian Millwork Industry	All Canadian Manufacturing Industries	All Canadian Wood Products Industries	U.S. Millwork Industry
1969 .....	27,883	..	..	..	21,528	..	..	..
1968 .....	23,801	36,025	24,950	..	18,317	25,424	21,350	..
1967 .....	22,100	33,110	21,089	27,300	17,084	23,380	18,218	22,700
1966 .....	21,212	31,787	19,652	26,300	16,623	22,473	16,880	21,400
1965 .....	18,403	30,274	18,524	25,800	14,364	21,382	15,769	21,200
1964 .....	18,315	28,958	17,874	24,900	14,225	20,475	15,079	20,200
1963 .....	16,547	27,633	16,846	23,700	13,087	19,435	14,155	19,500
1962 .....	15,798	26,165	15,648	21,500	12,443	18,333	13,238	18,600
1961 .....	15,514	24,604	14,649	20,700	11,820	17,114	12,129	17,900

Year	GROSS PRODUCTION PER \$1,000 OF WAGES (OWN MANUFACTURE)				FACTORY SHIPMENTS PER \$1,000 OF PAYROLL (OWN MANUFACTURE)			
	Canadian Millwork Industry²	All Canadian Manufacturing Industries³	All Canadian Wood Products Industries³	U.S. Millwork Industry⁴	Canadian Millwork Industry	All Canadian Manufacturing Industries	All Canadian Wood Products Industries	U.S. Millwork Industry
1969 .....	5,653	..	..	..	3,900	..	..	..
1968 .....	5,408	6,727	5,000	..	3,655	4,216	4,007	..
1967 .....	5,378	6,669	4,600	5,400	3,648	4,210	3,714	3,900
1966 .....	5,447	6,767	4,603	5,400	3,797	4,290	3,712	3,900
1965 .....	5,223	6,828	4,664	5,500	3,644	4,332	3,729	4,000
1964 .....	5,451	6,886	4,812	5,500	3,819	4,358	3,804	4,000
1963 .....	5,259	6,879	4,756	5,300	3,710	4,313	3,747	4,000
1962 .....	5,327	6,766	4,671	5,500	3,706	4,231	3,700	4,000
1961 .....	5,398	6,660	4,590	5,400	3,628	4,111	3,540	3,900

¹Compiled by the Department of Industry, Trade and Commerce, Wood Products Branch

²Source: Statistics Canada Catalogue #35-205 "Sash, Door and Other Millwork Plants", Annual Census of Manufactures . . . physical productivity figures include working owners and partners

³Source: Statistics Canada Catalogue #31-203 "Manufacturing Industries of Canada, Section A — A Summary for Canada" . . . physical productivity figures include working owners and partners

⁴Source: U.S. Bureau of the Census, "Annual Census of Manufactures 1967" U.S. Government Printing Office, Washington D.C. Figures listed are rounded to nearest \$100

own manufacture corrected for changes in inventory and the cost of manufacturing materials and supplies including fuel and power consumed in production activities. From its value added a firm must meet overhead expenses including labour costs and provide a return on invested capital.

In *Table 12* figures for value added per production worker and per employee are presented for the Canadian and United States millwork industries and for all manufacturing and all wood products industries in Canada. Value added figures per \$1,000 of wages and total payroll are also provided.

*Chart 5* outlines the growth in value added per production worker in the Canadian and United States millwork industries and in all Canadian manufacturing industries.

### C. Selected Operating Ratios

No published information is available on the financial structure of the Canadian millwork industry. However, two important operating ratios, the cost of materials and supplies as a percentage of gross production and wages and salaries as a percentage of gross production, can be calculated. These statistics are presented in *Table 13*.

It is observed that the ratio of the cost of materials and supplies to gross production was lower in the Canadian millwork industry than in the United States millwork industry in 1967, but was higher than the average in all Canadian manufacturing and wood products industries. Similarly, wages and salaries in the Canadian millwork industry formed a larger share of the gross value of production than they did in the United States millwork industry and in all Canadian manufacturing industries. This occurred despite the fact that wages and salaries were considerably lower in the domestic millwork industry in 1967 than in its United States counterpart or in Canadian manufacturing industries considered as a group.

### D. Technology and Innovation in the Millwork Industry

The adoption of new production techniques and the development of new products by an industry is one measure of its success in today's changing markets. Certainly this concept is a valid one in the millwork industry which is now being challenged by the increasing use of non-wood materials in residential and institutional construction. However, statistical information that would indicate how the industry is responding to this challenge is limited and inconclusive.

In a previous section it was observed that there appears to be a trend towards concentration of business among larger millwork firms in Canada. This is being accompanied by a decline in the number of establishments organized as individual proprietorships and partnerships. One may assume that the resulting overall trend towards larger firms organized as corporations is increasing the industry's capacity to develop new methods of production and new products and hence to compete more effectively with substitute building materials such as metals and plastics. However, this view gains little support from the available data. As noted earlier, new capital formation in the millwork industry is not expanding any faster than the overall increase in shipments or production. Moreover, as Appendix E indicates, the composition of materials used by the millwork industry as a whole does not appear to have changed significantly in recent years.

TABLE 12

LABOUR PRODUCTIVITY AS MEASURED BY VALUE ADDED<sup>1</sup>

Year	VALUE ADDED PER PRODUCTION WORKER (Manufacturing Activity Only)				VALUE ADDED PER EMPLOYEE (Total Activity)			
	Canadian Millwork Industry <sup>2</sup>	All Canadian Manufacturing Industries <sup>3</sup>	All Canadian Wood Products Industries <sup>3</sup>	U.S. Millwork Industry <sup>4</sup>	Canadian Millwork Industry <sup>2</sup>	All Canadian Manufacturing Industries <sup>3</sup>	All Canadian Wood Products Industries <sup>3</sup>	U.S. Millwork Industry <sup>4</sup>
1969 .....	11,606	..	..	..	9,510	..	..	..
1968 .....	10,043	15,638	11,278	..	8,326	11,777	9,878	..
1967 .....	9,386	14,387	9,220(est)	11,800	7,935	10,833	8,165 (est)	9,800
1966 .....	9,025	13,778	8,489	10,700	7,787	10,398	7,513	8,700
1965 .....	8,137	13,204	8,075	10,400	6,832	9,960	7,091	8,500
1964 .....	7,897	12,612	7,819	10,300	6,630	9,454	6,857	8,400
1963 .....	7,327	12,037	7,510	9,800	6,255	8,932	6,504	8,000
1962 .....	6,984	11,526	6,897	8,300	6,008	8,521	6,018	7,200
1961 .....	6,792	10,911	6,159	8,000	5,708	7,982	5,286	6,900

Year	VALUE ADDED PER \$1,000 OF WAGES (Manufacturing Activity Only)				VALUE ADDED PER \$1,000 PAYROLL (Total Activity)			
	Canadian Millwork Industry <sup>2</sup>	All Canadian Manufacturing Industries <sup>3</sup>	All Canadian Wood Products Industries <sup>3</sup>	U.S. Millwork Industry <sup>4</sup>	Canadian Millwork Industry <sup>2</sup>	All Canadian Manufacturing Industries <sup>3</sup>	All Canadian Wood Products Industries <sup>3</sup>	U.S. Millwork Industry <sup>4</sup>
1969 .....	2,353	..	..	..	1,723	..	..	..
1968 .....	2,282	2,920	2,261	..	1,661	1,967	1,854	..
1967 .....	2,284	2,898	2,011	2,300	1,695	1,950	1,664	..
1966 .....	2,318	2,933	1,988	2,200	1,779	1,985	1,652	..
1965 .....	2,309	2,978	2,033	2,200	1,732	2,018	1,677	..
1964 .....	2,350	2,999	2,105	2,300	1,780	2,012	1,729	..
1963 .....	2,329	2,996	2,120	2,200	1,773	1,982	1,722	..
1962 .....	2,355	2,981	2,059	2,100	1,789	1,966	1,682	..
1961 .....	2,363	2,954	1,929	2,100	1,752	1,917	1,543	..

<sup>1</sup>Compiled by the Department of Industry, Trade and Commerce, Wood Products Branch<sup>2</sup>Source: Statistics Canada Catalogue #35-205 "Sash, Door and Other Millwork Plants", Annual Census of Manufactures . . . value added per production worker and per employee figures include working owners and partners<sup>3</sup>Source: Statistics Canada Catalogue #31-203 "Manufacturing Industries of Canada", Section A — Summary for Canada . . . value added per production worker and per employee figures include working owners and partners<sup>4</sup>U.S. Bureau of the Census, "Annual Census of Manufactures 1967" U.S. Government Printing Office, Washington D.C. . . . figures rounded to nearest \$100. Note that value added figures relate to manufacturing activity only. Also note that U.S. working owners and partners are not included in value added per man.

**TABLE 13**  
**SELECTED OPERATING RATIOS AS A**  
**PERCENTAGE OF GROSS PRODUCTION<sup>1</sup>**

	Cost of Material and Supplies (%)		Salaries and Wages (%)	
	<u>1968</u>	<u>1967</u>	<u>1968</u>	<u>1967</u>
Canadian Millwork Industry <sup>2</sup> .....	57	56	27	27
All Canadian Manufacturing Industries <sup>3</sup> .....	55	55	23	24
All Canadian Wood Products Industries <sup>3</sup> .....	53	54	25	27
U.S. Millwork Industry <sup>4</sup> .....	..	58	..	24

<sup>1</sup>Compiled by the Department of Industry, Trade and Commerce, Wood Products Branch

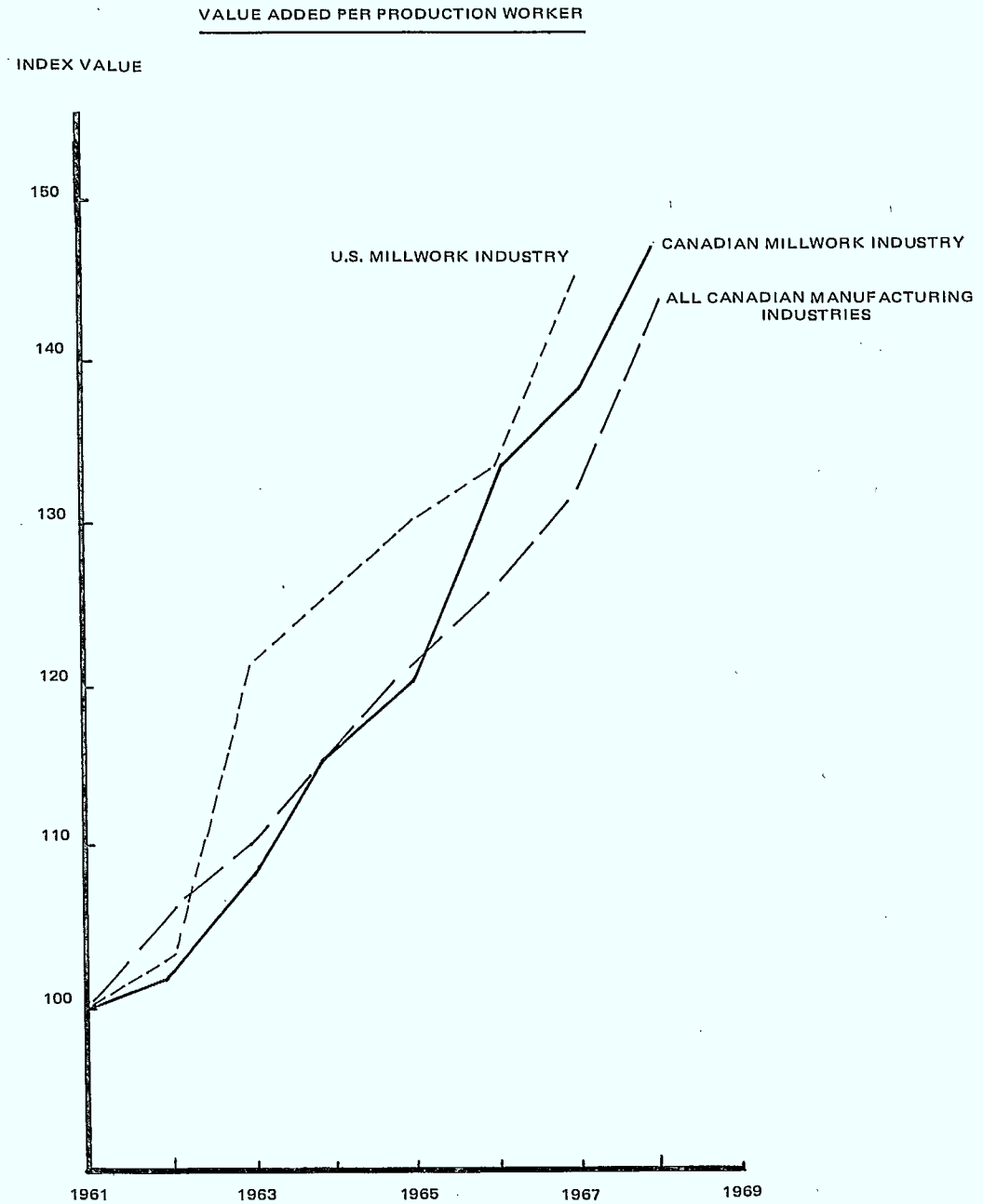
<sup>2</sup>Source: Appendix B1

<sup>3</sup>Source: Statistics Canada Catalogue #31-203, "Manufacturing Industries of Canada, Section A — Summary for Canada".

<sup>4</sup>Source: Appendix C1



Chart 5  
INDEX TRENDS IN THE CANADIAN AND AMERICAN MILLWORK INDUSTRIES AND ALL  
CANADIAN MANUFACTURING INDUSTRIES  
(1961 = 100)



SOURCE: APPENDIX F2



# **MARKETS FOR CANADIAN MILLWORK**



#### **A. Recent Growth in the Domestic Market**

Published data on the consumption of millwork in Canada is not available. However, some indication of the total market in this country can be obtained from *Table 14* which lists apparent consumption of millwork for each of the years between 1964 and 1969. In calculating these figures prefabricated wooden buildings were not included as precise data on Canadian trade in these items was not available. The reader is further advised that the apparent consumption statistics in *Table 14* were calculated using the value of factory shipments from the Canadian millwork industry. These shipments figures closely approximate, but are not equal to, the dollar value of shipments of millwork from all industries in Canada.

Consumption of millwork in Canada appears to have increased substantially between 1964 and 1969 on the basis of the data presented in *Table 14*. The somewhat uneven character of this growth is probably attributable to the erratic pace of construction activity in this country.

*Table 14* also provides an indication of the relative importance of millwork imports in the Canadian market. Purchases from other countries never amounted to more than three per cent of total domestic (apparent) consumption of millwork during the period 1964 to 1969.

#### **B. Regional Location of the Domestic Market**

No information is published on the provincial consumption of millwork in Canada. However, by considering the value of residential, commercial and institutional construction in each province some idea of the regional pattern of consumption may be gained. This data is presented in *Table 15*.

Ontario leads in the types of construction listed above followed by Quebec, British Columbia, Alberta and Manitoba. One notes that building activity in Nova Scotia, New Brunswick, Manitoba, Alberta, British Columbia and Ontario increased rapidly between 1964 and 1969, suggesting that these provinces in particular expanded their consumption of millwork during this period.

#### **C. Foreign Trade**

##### *(i) Imports*

Overall, Canada is a net importer of millwork (if prefabricated buildings are not considered) with exports usually averaging less than one-half the value of imports. Millwork imports are tabulated under three classifications in Canadian trade statistics: doors of wood; windows and door and window frames of wood; and a miscellaneous category, millwork n.e.s. Canada's major source of products that fall under each of these statistical groupings is the U.S. with relatively minor purchases being made from Taiwan and Japan.

During the period 1964 to 1970, Canadian imports of millwork from the U.S. increased by 76 per cent from \$2,848,000 to \$5,013,000. It is expected that expanded purchases of wooden mouldings, classified under the millwork n.e.s. category, account for most of this increase. Overall, imports from the U.S. made up just slightly more than 2 per cent of total domestic (apparent) consumption of millwork in 1969.

It is interesting to speculate why the very large and efficient millwork firms in the U.S. have not penetrated the Canadian market for millwork more deeply. Doubtless, there are several factors at work including the Canadian tariff (See Appendix II) and the transportation costs involved in shipping millwork long distances. However, one very important consideration that tends to be overlooked is the orientation of the Canadian millwork industry towards marketing its products directly to dealers or contractors instead of selling through distributors. In the U.S., most millwork is sold through distributors and producers there have come to rely on a well-established distribution network. Hence, they find it difficult or inconvenient to sell their goods in Canada, where no comparable network exists.

**TABLE 14**  
**APPARENT CONSUMPTION OF MILLWORK PRODUCTS IN CANADA**  
**EXCLUDING PREFABRICATED WOODEN BUILDINGS<sup>1</sup>**  
**(\$000)**

Year	Shipments From Canadian Millwork Industry	(Deduct) Exports	(Add) Imports	Apparent Consumption	Index of Apparent Consumption (1964=100)
1969 .....	237,295	2,482	6,296	241,109	146
1968 .....	210,116	2,201	4,369	212,284	128
1967 .....	193,463	1,383	3,483	195,563	118
1966 .....	186,029	1,416	3,349	187,962	114
1965 .....	165,060	1,042	3,148	167,166	101
1964 .....	163,496	1,034	2,848	165,310	100

<sup>1</sup>Compiled by the Department of Industry, Trade and Commerce, Wood Products Branch on the basis of material found in Appendices B1 and Canadian Imports of Millwork, etc.

Appendix H2 lists Canadian millwork imports by commodity and by source country. Comparable statistics for the U.S. are presented in Appendix G2.

Before leaving this section on imports it should be noted that Canadian millwork firms rely rather heavily on imported raw materials. Although no precise data is available to indicate the percentage of lumber purchased from foreign suppliers, it is known that door, window and moulding manufacturers in particular utilize considerable quantities of Ponderosa Pine from the western United States because this wood is relatively "clear" (i.e. free of knots). Also, firms producing mouldings and certain kinds of architectural millwork import wood species such as mahogany and teak that are not available domestically; and door producers make extensive purchases of low-priced "door skins" from the Orient. Glass used by many millwork plants manufacturing windows comes mainly from Europe and various other hardware items are purchased from abroad by all sectors of the industry.

### *(iii) Exports*

On the export side one is struck by the relatively insignificant volume of foreign sales. Between 1964 and 1969 export shipments represented less than one per cent of total sales from the Canadian millwork industry (prefabricated buildings excluded). Nevertheless, exports have grown significantly over the last decade and by 1970 reached \$2,561,000 as compared to \$322,000 in 1961, an eight-fold increase. It is also worthwhile to note that exports from the U.S. millwork industry accounted for less than one-half of one per cent of total shipments in each year between 1964 and 1967.

With the exception of prefabricated wooden buildings, millwork exports are classified under two categories in Statistics Canada trade publications: doors of wood and millwork n.e.s. Appendix H1 lists Canadian millwork exports in these two categories. As indicated, the U.S. was Canada's major export market between 1961 and 1970 especially for products classified under millwork n.e.s. It is believed that these sales were primarily of unfinished mouldings. The second largest export market during this period was the West Indies where sales consisted primarily of wooden doors. The only other export outlet of any significance during the sixties was Britain. Shipments to that market were mostly of louvre doors and window components.

**TABLE 15**  
**TOTAL VALUE OF RESIDENTIAL,**  
**COMMERCIAL AND INSTITUTIONAL CONSTRUCTION BY PROVINCE<sup>1</sup>**  
**(\$000)**

	<u>1970<sup>2</sup></u>	<u>1969<sup>3</sup></u>	<u>1968</u>	<u>1967</u>	<u>1966</u>	<u>1965</u>	<u>1964</u>
Ontario .....	2,793,635	2,746,479	2,531,384	2,172,762	2,008,275	1,785,459	1,576,392
Quebec .....	1,419,523	1,401,424	1,365,324	1,308,548	1,360,788	1,322,621	1,187,121
British Columbia .....	863,067	829,252	739,438	707,773	599,709	548,439	453,488
Alberta .....	671,567	666,622	559,852	536,838	474,423	408,276	374,844
Manitoba .....	327,814	304,205	234,340	208,425	212,257	192,211	187,931
Saskatchewan .....	229,619	237,820	252,005	241,584	240,282	216,130	189,597
Nova Scotia .....	213,018	217,012	166,054	149,854	136,661	125,081	104,281
New Brunswick .....	146,949	142,376	139,516	105,395	104,314	92,421	78,334
Newfoundland .....	106,827	91,189	108,205	96,469	107,649	76,837	69,485
Prince Edward Island .....	18,630	18,133	15,791	16,323	18,705	18,454	14,801

<sup>1</sup>Source: Statistics Canada Catalogue #64-201 "Construction in Canada" Years 1964-1968

<sup>2</sup>Intentions

<sup>3</sup>Preliminary Estimates

Appendix G1 itemizes U.S. millwork exports in recent years. This table is presented both for purposes of comparison and to indicate countries where market potential may exist for Canadian millwork.

The reader is referred to Appendices I2 and I3 for a listing of the tariff rates which apply to millwork products in selected foreign markets. Further information on access conditions in markets abroad may be obtained by contacting the Office of Area Relations, Department of Industry, Trade and Commerce, 112 Kent Street, Ottawa, K1A 0H5.



**MAJOR PRODUCTS MANUFACTURED  
BY THE CANADIAN MILLWORK INDUSTRY**



This section is devoted to a brief review of each of the major products manufactured by the Canadian millwork industry. The information is largely statistical but is supplemented with material obtained from discussions with selected producers. The reader is reminded that statistical data on this industry's activities are available only for the years prior to 1969. Thus, changes in market conditions for various millwork products that have occurred since that date could not be considered.

#### A. Wood Doors

There are a number of large producers that specialize in the manufacture of wood doors. However, as is the case with most other millwork products, wood doors are also manufactured by a great many millwork firms in small quantities often as a secondary activity or along with a number of other products. Keen competition for markets and increasing utilization of non-wood materials whose use demands fairly heavy capital investment would appear to be encouraging a rationalization of production favouring the larger, more specialized firms.

Door shipments from the Canadian millwork industry increased from \$25,848,000 in 1961 to \$52,306,000 in 1969, or slightly more than 100 per cent. (See Appendix D1.) This increase in the value of shipments was accompanied by a moderate increase in door selling prices so that the actual *volume* of shipments increased by about 50 per cent. This is illustrated in *Chart 6*.

According to several door producers, prices would have increased even more sharply than they actually did during the past decade except for the fact that the number of standard door sizes was reduced. This move made longer production runs possible and held down unit costs. Doors accounted for between 15 and 20 per cent of total shipments from the Canadian millwork industry between 1961 and 1969.

*Chart 7* illustrates the composition of door shipments between 1963 and 1969. As indicated, residential flush-type doors were the largest single group accounting for slightly more than 40 per cent of door shipments each year. The next largest group was industrial flush-type doors (20 per cent). Note that the proportion of plastic-faced industrial flush-type doors increased during this period while shipments of plywood-faced industrial doors declined in importance. The increasing share of shipments accounted for by the "other wood doors" category was due primarily to the strong growth in sales of pre-hung doors after 1964.

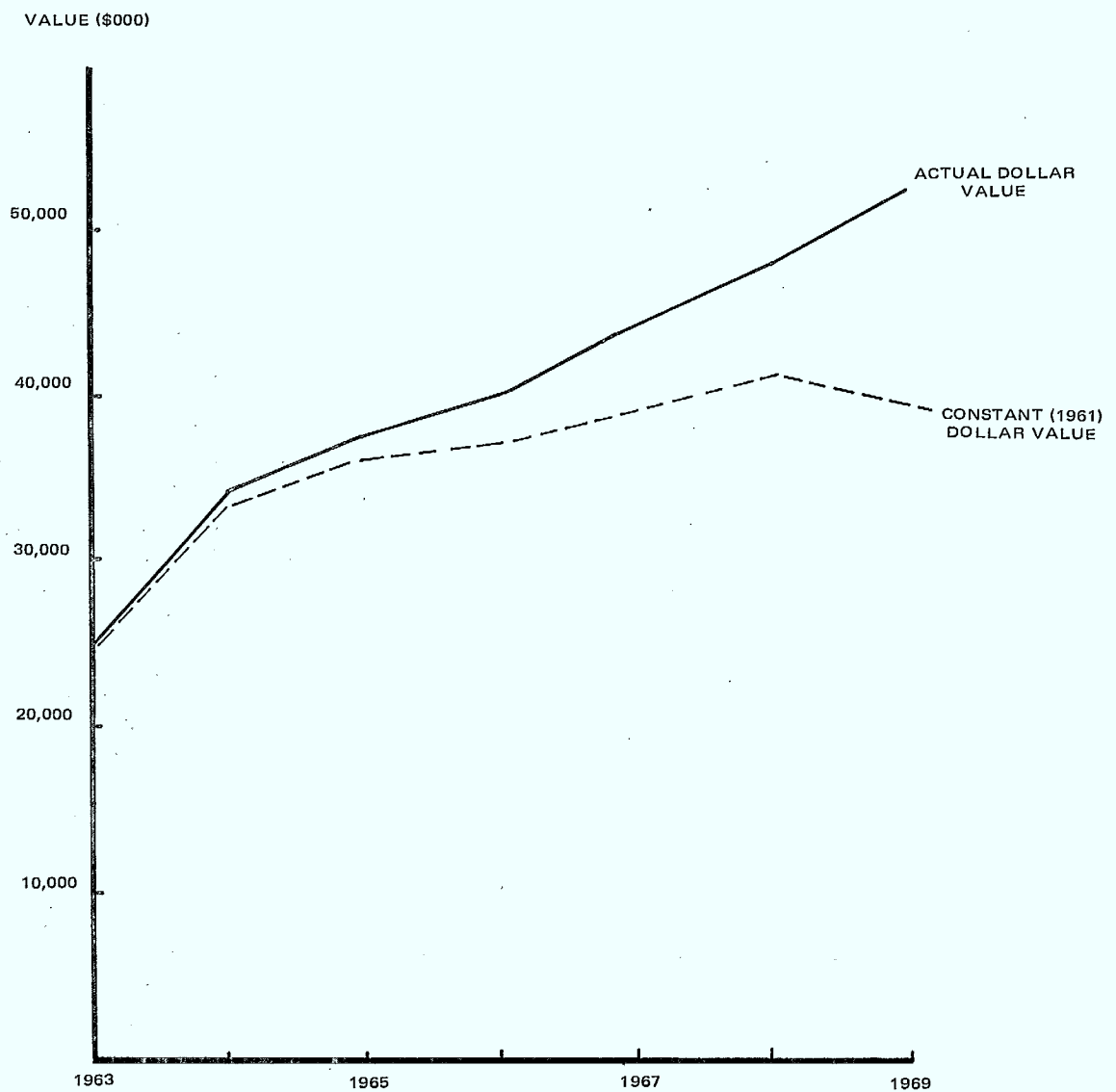
In recent years exports of wood doors (1 to 2 per cent of total factory shipments) have exceeded imports. The bulk of our sales abroad are to the U.S., but a promising market for Canadian-made louvre doors appears to be opening up in Europe.

#### B. Wood Windows

Shipments of wooden windows and sash from the Canadian millwork industry increased by 20 per cent from \$33,276,000 in 1961 to \$40,674,000 in 1969. (See Appendix D1.) All of this increase is attributable to higher selling prices for these products during this period. In fact, if window prices had not gone up but had instead remained at their 1961 level, the dollar value of shipments actually would have decreased to about \$28,000,000 by 1969 (see *Chart 8*). The proportion of total shipments of millwork accounted for by wooden windows and sash declined from 23 per cent to 12 per cent between 1961 and 1969.

The failure of the wood window sector to maintain sales growth during the 1960s can probably be attributed to the increasing use in Canada of windows made from alternate materials. Commercial and institutional buildings as well as some multiple dwellings frequently utilize all metal or metal and plastic windows primarily because they are relatively maintenance-free. Use of wood windows is largely confined

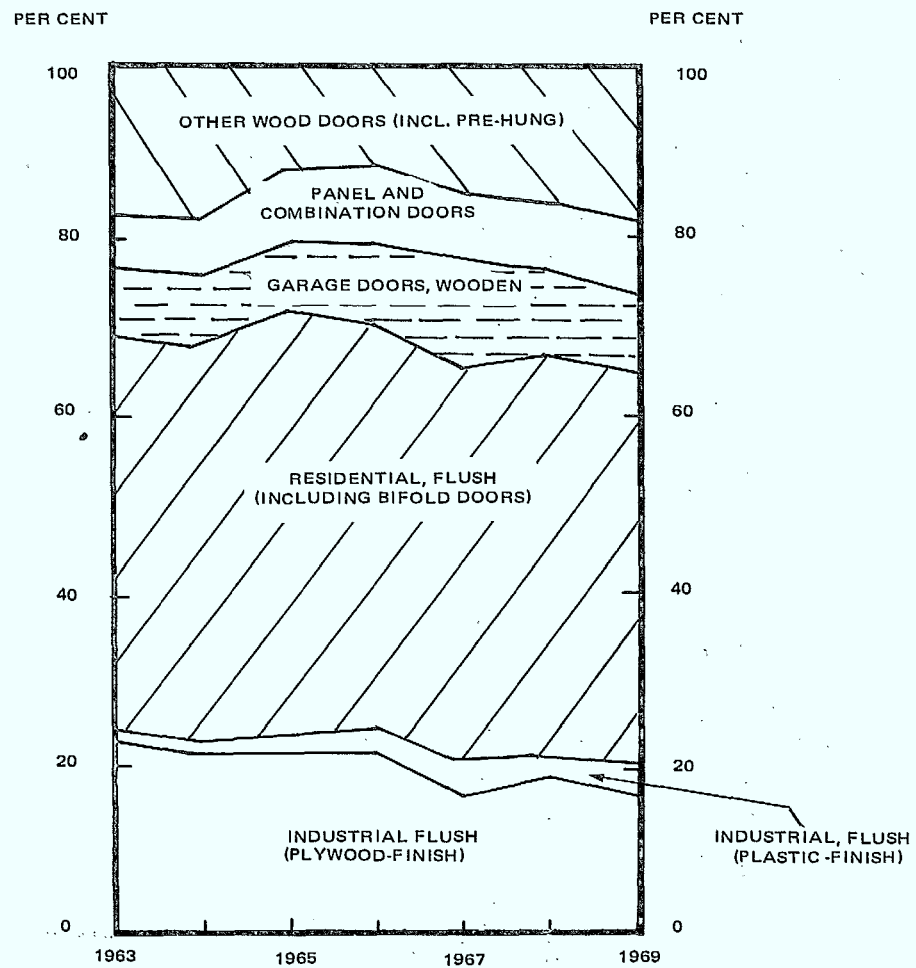
Chart 6  
VALUE OF SHIPMENTS OF DOORS FROM THE CANADIAN MILLWORK INDUSTRY  
(1963 - 1969)



SOURCE: APPENDIX D1

Chart 7

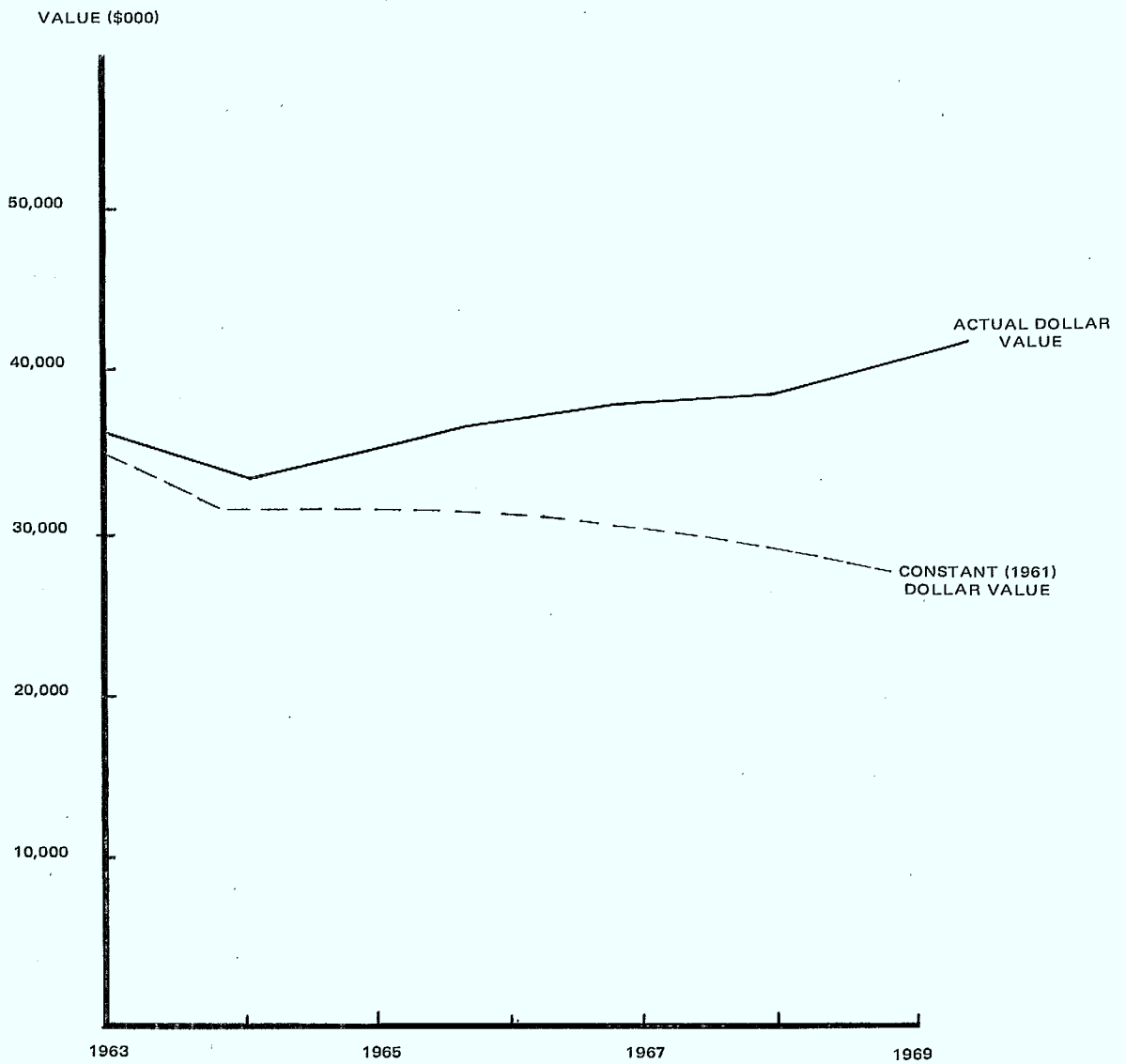
COMPOSITION OF DOOR SHIPMENTS BY THE CANADIAN MILLWORK INDUSTRY  
(1963 - 1969)



SOURCE: APPENDIX D1

Chart 8

VALUE OF SHIPMENTS OF WINDOWS AND SASH FROM THE CANADIAN MILLWORK INDUSTRY  
(1963 - 1969)



SOURCE: APPENDIX D1

to residential construction and even here the emphasis appears to be on the combination of wood with other materials.

Dependence on the residential market requires wood window manufacturers to produce a wide variety of window types and sizes to suit the tastes of individual homeowners or developers. This increases their unit costs of production. Higher costs also result from the need to adopt the technology associated with combining alternate materials with wood in window manufacture. Unfortunately, in the face of increasing competition from non-wood windows, millwork producers find it difficult to pass higher costs on to their customers.

The cost-price squeeze encountered by millwork firms producing windows would appear to favour a trend toward larger, more specialized and efficient establishments. However, industry spokesmen claim that there are still many small, relatively inefficient producers making wood windows. According to these sources, such firms manage to stay in business because they are prepared to sell low quality windows at depressed prices. Despite the fact that such windows are often made from wood that is inadequately dried or treated or exhibits other defects such as knots, they find a market among contractors and developers who are anxious to reduce construction expenses in the face of rising land costs.

Responsible producers in the wood window industry have sought to improve window quality by ensuring that minimum quality standards established by the Central Mortgage and Housing Corporation are observed by all window manufacturers. A voluntary quality standards program, administered by the industry's trade association, has been established but to date, this program has not been accepted by all producers. Increased participation by the industry in this program would undoubtedly result in improved overall performance of wood windows.

Canadian imports of wood window units and sash far exceed exports but are small in relation to the total domestic market for these products. (Refer to Appendix H2.) Export shipments are directed largely to the U.S. and Europe and include assembled as well as knocked-down windows and components.

### C. Wood Mouldings

The value of factory shipments of mouldings from the Canadian millwork industry increased by 71 per cent from \$13,145,000 in 1961 to \$22,527,000 in 1969. This increase was attributable almost entirely to a rise in selling prices as *Chart 9* indicates. It should be noted that firms in the industry specializing in mouldings report that demand for these products has been particularly strong in the past year.

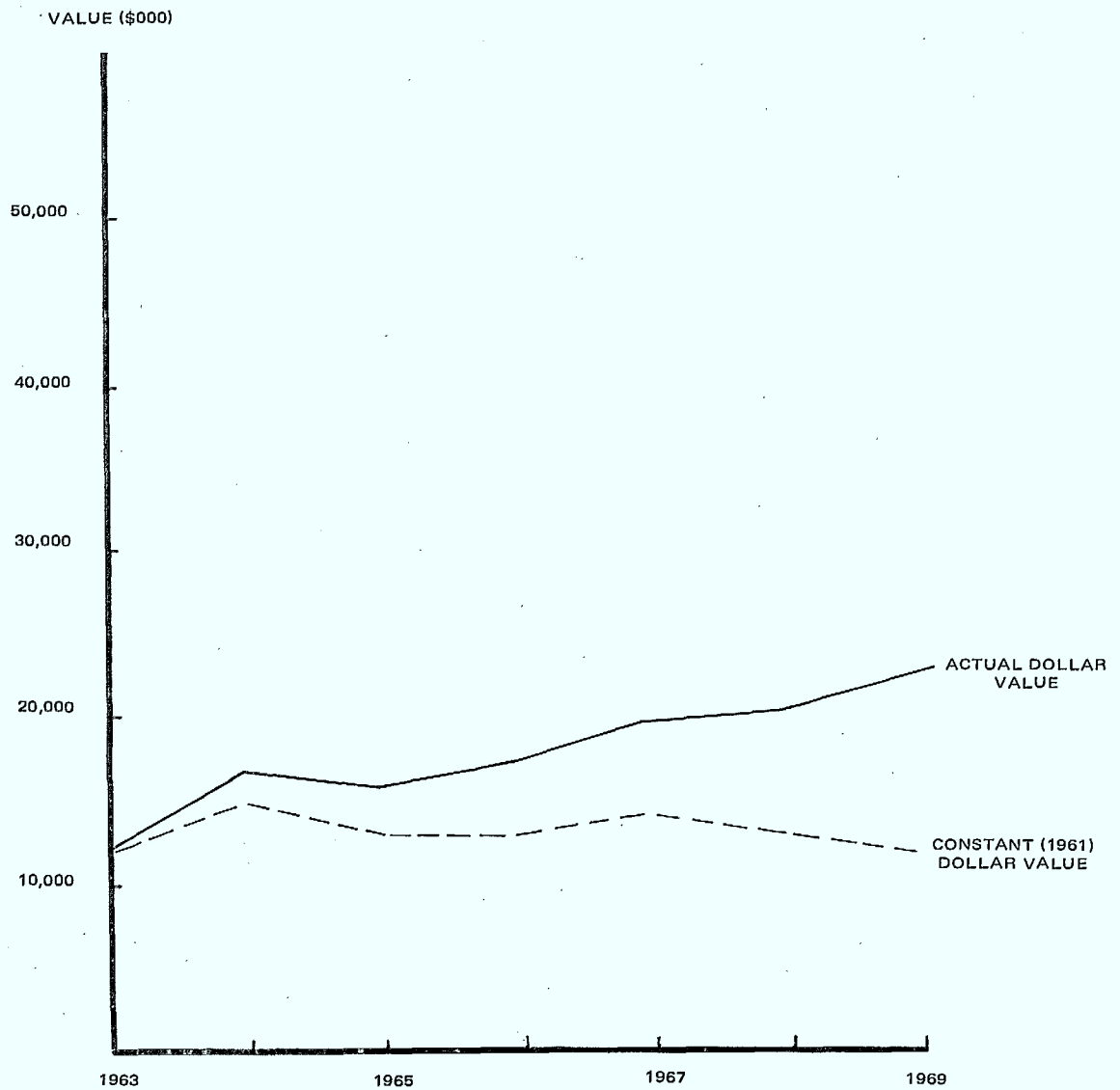
Although there is no statistical evidence, it appears that wooden mouldings, like wooden windows, are experiencing stiff competition from metals and plastics especially in commercial and institutional construction. Manufacturers in the millwork industry, particularly the large highly mechanized producers, have responded to this challenge by placing increasing emphasis on pre-finished mouldings.

There would appear to be a trend away from moulding manufacture as a secondary activity in the millwork industry. The few large firms specializing in mouldings in Canada are able to realize considerable economies of scale and manufacture generally superior products. As a result, small firms are finding it increasingly difficult to compete for the available moulding markets.

According to published U.S. trade statistics, Canada exported relatively large volumes of unfinished construction mouldings to that country between 1964 and 1969. In fact, up to six per cent of the total Canadian production of mouldings during this period was directed to that market (refer to Appendix G2).

Chart 9

VALUE OF SHIPMENTS OF MOULDINGS FROM THE CANADIAN MILLWORK INDUSTRY  
(1963 - 1969)



SOURCE: APPENDIX D1



It is believed that there has been a corresponding increase in Canadian imports of mouldings from the U.S. in recent years. A large proportion of these mouldings are pre-finished and are finding a good market in institutional and commercial construction.

#### **D. Other Millwork**

##### *(i) Prefabricated Buildings*

Although plants principally engaged in the manufacture of prefabricated wood frame buildings are classified to the millwork industry by Statistics Canada, such firms have little in common with other establishments in this industry. For the most part, manufacturers of prefabricated buildings are specialized firms which do not produce millwork for direct sale to the builder or contractor. Accordingly, it is considered appropriate for purposes of this review to withhold comment on this sector's activities.

The value of shipments of prefabricated buildings from the millwork industry for the years 1961 to 1969 is presented in Appendix D1.

##### *(ii) Furniture*

Most furniture produced by the millwork industry is made to architects' specifications for use in commercial buildings or in public buildings such as schools, churches and hospitals. Typical items would include cabinets, shelves, school desks, wooden counters. The industry also produces small amounts of household furniture.

Between 1961 and 1969 furniture shipments from the Canadian millwork industry increased by 160 per cent from \$5,176,000 to \$13,476,000. Only modest selling price inflation occurred during this period so that growth in real terms was impressive as *Chart 10* indicates.

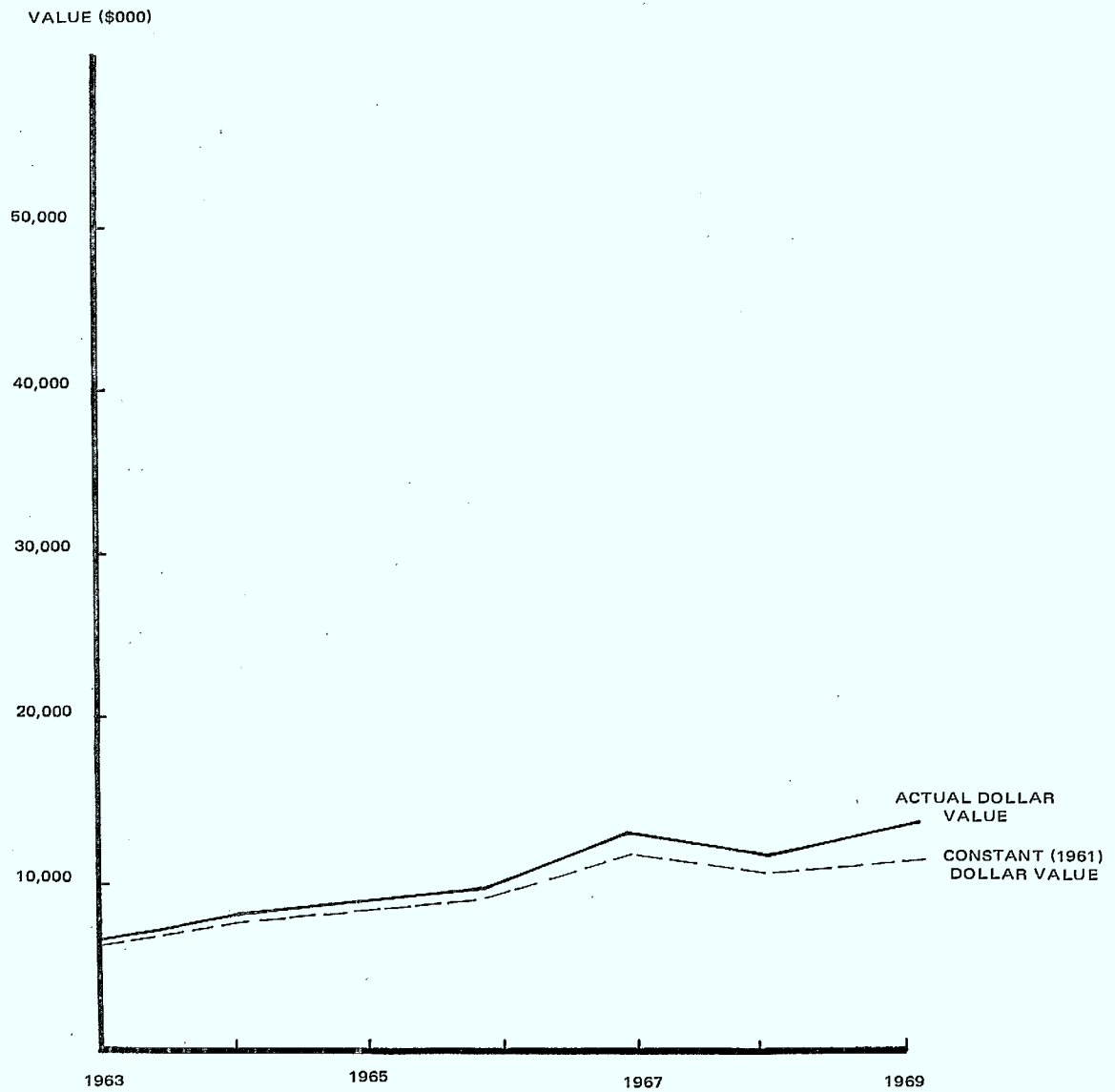
*Chart 11* illustrates the composition of furniture shipments from the industry between 1963 and 1969. It should be noted that furniture for public buildings other than schools declined in relative importance while the value of shipments of furniture and fixtures for hotels, restaurants and stores and also for household use increased proportionally.

##### *(iii) Architectural Millwork*

There are few very large millwork firms in Canada specializing in the production of architectural millwork, for although economies of scale are possible, the fact that most of the goods produced are one-of-a-kind items precludes assembly line methods of manufacture. Consequently, producers are required to invest in specialized equipment that usually is not utilized on a continuous basis. A shortage of trained personnel in the industry, especially qualified estimators, also prevents many firms from expanding their operation beyond a size which can be satisfactorily controlled by one man (often the owner of the business) who does most of the bidding on jobs as well as handling overall administration.

The architectural millwork field is characterized by a high number of withdrawals or bankruptcies. There are several reasons for this. The way this market is organized means that architectural millwork firms must undertake considerable preliminary expense preparing a cost estimate or tender that usually cannot be recovered unless the contract is actually won. Frequently, it is necessary to tender on several projects before being successful. Also, it may be necessary for the millwork firm to post a bond of surety with the general contractor or architect. Payment for work done may not be made until the entire project is completed which sometimes forces millwork firms to carry an account for long periods of time.

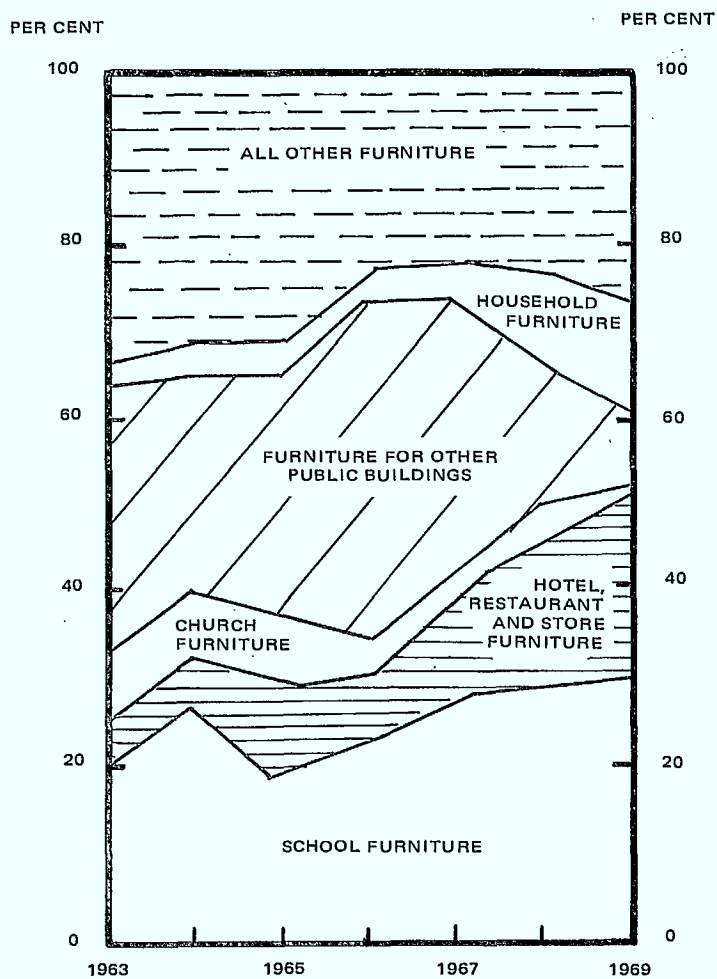
Chart 10  
VALUE OF SHIPMENTS OF FURNITURE FROM THE CANADIAN MILLWORK INDUSTRY  
(1963 - 1969)



SOURCE: APPENDIX D1

Chart 11

COMPOSITION OF FURNITURE SHIPMENTS BY THE CANADIAN  
MILLWORK INDUSTRY (1963 - 1969)



SOURCE: APPENDIX D1

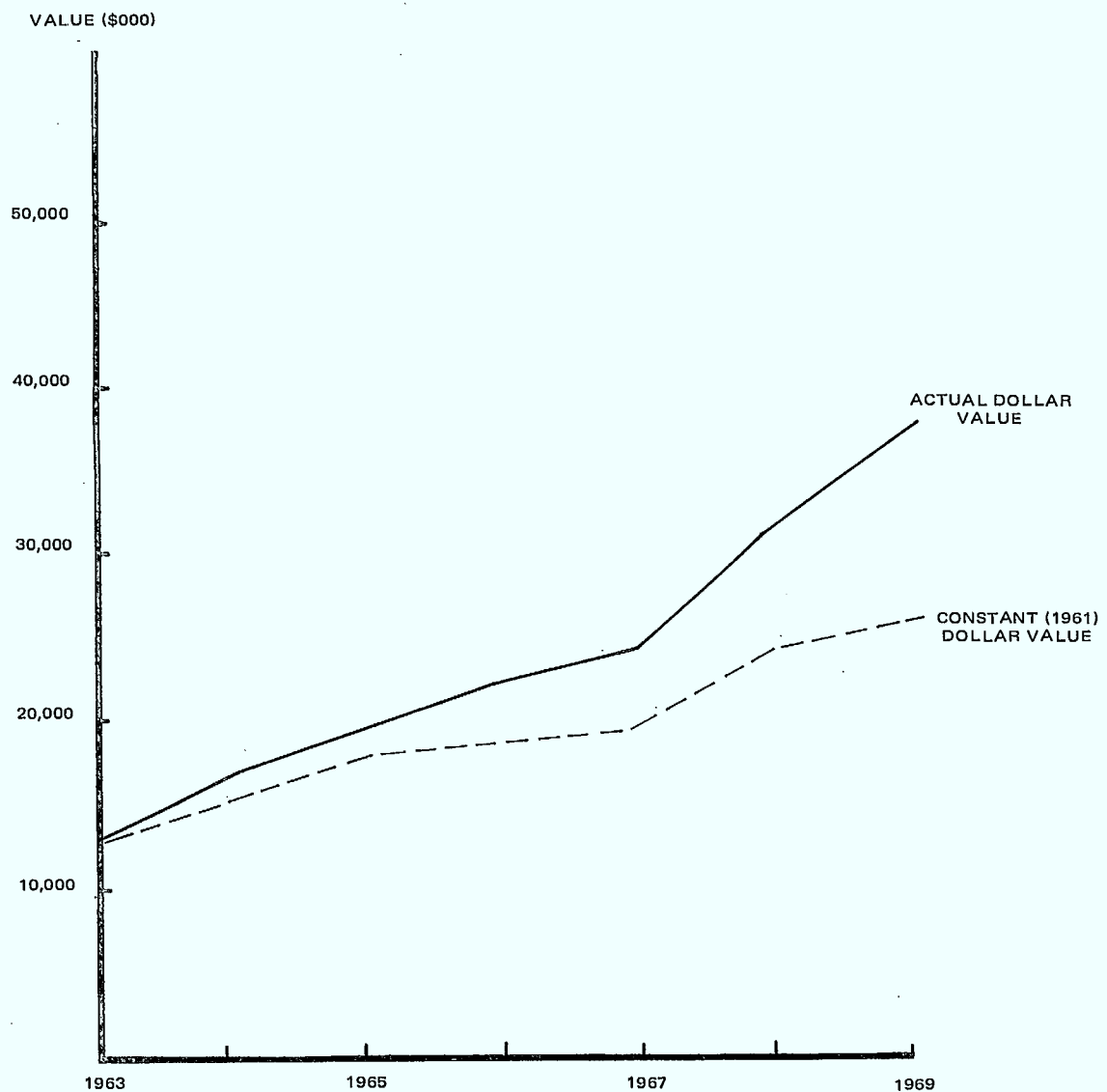
*(iv) Kitchen Cabinets*

Most of the cabinets produced by the millwork industry are manufactured in specialized plants and are shipped assembled direct from the manufacturer to the contractor.

Between 1961 and 1969 the value of shipments of kitchen units and cabinets more than tripled from \$11,745,000 to \$37,652,000. In real terms, however, this increase was closer to 120 per cent (see *Chart 12*).

The current trend towards increased use of factory built cabinets coupled with projected growth in residential construction is expected to result in significant expansion over the next several years in the factory-built cabinet sector.

Chart 12  
VALUE OF SHIPMENTS OF KITCHEN UNITS AND CABINETS FROM THE CANADIAN  
MILLWORK INDUSTRY



SOURCE: APPENDIX D1



## **CHALLENGES**





A number of problems facing producers in specific sectors of the Canadian millwork industry have already been discussed. In this section some of the more general problems encountered by most millwork plants are outlined.

#### **A. The Challenge from Substitute Materials**

In most sectors of the industry, some market penetration has been achieved by products manufactured from substitute (i.e. man-made) materials. As noted earlier, windows used in commercial, industrial and institutional buildings and in large multiple dwelling units are frequently made of metal or plastic. In single family houses, metal and plastic windows are gaining some acceptance. Similarly, more mouldings and doors are being made from non-wood materials or are being clad with vinyl to simulate natural wood grain. Moulded plastics are beginning to compete with wood products in the architectural millwork field.

It is agreed that wood has features that substitute materials do not possess such as natural colour and warmth and good insulating qualities. However, if wood millwork products are to maintain their position in the market, producers will have to develop ways of offsetting the advantages offered by substitute materials. The millwork industry is aware of this requirement and generally agrees that in the future the emphasis will be on large-scale production in order to lower unit costs and on pre-finishing to reduce on-site labour expenses. Greater use of substitute materials such as plastics and vinyls to supplement and enhance the natural attributes of wood as a material is also anticipated.

#### **B. Financing Capital Investment**

The major market for products of the millwork industry is in residential construction and consequently, periodic fluctuations in the level of residential housing activity are reflected in the demand for millwork products. As a result, uncertainty regarding future sales and profits is created among many millwork producers, which makes them reluctant to undertake needed capital expenditures. Banks and other lending institutions are aware of this situation and are often hesitant to establish substantial lines of credit for millwork firms at a time when there is a need to adopt new technology and to develop new products. These circumstances favour the larger, more efficient producers whose earnings are adequate to internally finance capital investment.

#### **C. Fluctuating Materials Costs**

Materials used by the millwork industry, particularly lumber, tend to fluctuate widely in price. For example, producers report an 80 per cent increase in the price of Ponderosa Pine from the United States over the last two years.

Aside from affecting profit margins, changes in materials costs also cause marketing problems for the millwork industry. For example, demand for knocked-down or component windows in Europe appears to be strong, but it is difficult for Canadian suppliers to exploit this demand because fluctuating lumber prices make it difficult to quote firm prices for relatively long periods of time. Canadian firms are more inclined to market assembled window units because changes in the cost of raw materials such as lumber can be more easily absorbed.

In the architectural millwork sector, fluctuating materials costs are a particularly important factor since cost estimates for projects are often prepared several months before actual manufacturing is carried out.

## CONCLUSIONS AND SHORT-TERM OUTLOOK

1. The sixties were dynamic years for the Canadian millwork industry as gross output, factory shipments and labour productivity all advanced strongly. However, this growth was not shared equally by all sectors of the industry. For example, the increases seen in the value of shipments of wooden windows and wooden mouldings were due largely to higher selling prices for these products.
2. Markets for most millwork products have become more restricted over the past decade. Producers report lower profit margins are forcing firms to expand their sales volume in order to keep up with rising overhead expenses.
3. Along with increasing competition for available markets within the industry has come competition from substitute building materials such as metal and plastic. Millwork manufacturers are generally agreed that the need to hold down the cost of their products will lead to more mechanization and to increased emphasis on pre-finishing.
4. Despite the presence of factors favouring rationalization of production, the increase in the number of large millwork firms specializing in particular product lines has not been great. It appears that producers in this industry face major obstacles in their expansion programs particularly in generating needed investment capital. This situation arises from the uncertainty that is associated with the level of construction activity in Canada in any given year.
5. Conditions in the millwork industry favour larger, better equipped firms capable of generating adequate amounts of investment capital. Opportunities exist for mergers and take-overs that would increase profitability and facilitate a rationalization of production in the millwork industry in Canada.
6. Exports of millwork products, particularly to the U.S., have increased significantly over the past decade and in light of forecasted housing requirements this trend is expected to continue. Accordingly, increased emphasis on export market development should provide substantial benefits for the industry.

## **APPENDICES**



## APPENDIX A

### MILLWORK INDUSTRY SELLING PRICE INDEX (1961 = 100)

<u>Year</u>	<u>Index</u>
1969	145.2
1968	130.0
1967	124.5
1966	118.7
1965	111.6
1964	107.0
1963	103.5
1962	101.2
1961	100.0
1960	100.1
1959	100.6
1958	99.6
1957	100.2
1956	99.6

Source: Statistics Canada Catalogue #62-528 "Industry Selling Price Indexes"

# APPENDIX B1

## SELECTED PRINCIPAL STATISTICS<sup>1</sup> CANADIAN MILLWORK INDUSTRY 1961-1969

Year	Estab. No.	Employment <sup>2</sup>		Value of Shipments (own mfr.) (\$000)	Value Added (own mfr.) (\$000)	Value Added (total activity) (\$000)
		Total Activity No.	Mfg. Activity No.			
1969 .....	922	15,332	12,003	330,064	139,310	145,805
1968 .....	906	14,746	11,387	270,109	114,361	122,771
1967 .....	948	14,898	11,574	254,524	108,633	11,221
1966 .....	944	14,063	11,113	233,766	100,292	109,513
1965 .....	987	13,162	10,322	189,058	83,990	89,917
1964 .....	1,028	13,038	10,229	185,461	80,773	86,443
1963 .....	1,023	12,537	9,984	164,073	73,149	78,420
1962 .....	1,108	12,726	10,077	158,358	70,375	76,455
1961 .....	1,145	12,907	9,900	152,556	67,242	73,678

<sup>1</sup>Source: Statistics Canada Catalogue #35-205 "Sash, Door and Other Millwork Plants", Annual Census of Manufactures

<sup>2</sup>Includes Working Owners and Partners

# APPENDIX B2

## SELECTED PRINCIPAL STATISTICS IN CONSTANT DOLLARS<sup>1</sup> CANADIAN MILLWORK INDUSTRY 1961-1969

Year	Value of Shipments (own mfr.) (\$000)	Value Added (own mfr.) (\$000)	Value Added (total activity) (\$000)
1969 .....	227,317	95,944	100,417
1968 .....	207,776	87,970	94,439
1967 .....	204,437	87,255	94,957
1966 .....	196,939	84,492	92,260
1965 .....	169,407	75,260	80,571
1964 .....	173,328	75,489	80,788
1963 .....	158,525	70,675	75,768
1962 .....	156,480	69,541	75,548
1961 .....	152,556	67,242	73,678

<sup>1</sup>Source: Statistics Canada Catalogue #35-205 "Sash, Door and Other Millwork Plants", Annual Census of Manufactures.  
Constant Dollars Calculated from Statistics Canada "Industry Selling Price Indexes" Catalogue #62-528 (1961=100).  
Complete Index in Appendix A

# APPENDIX B3

## SELECTED PRINCIPAL STATISTICS BY PROVINCE CANADIAN MILLWORK INDUSTRY 1969<sup>1</sup>

<u>Province</u>	<u>Value of Shipments</u> (\$000)	<u>As % of Total</u>	<u>No. of Employees</u>	<u>As % of Total</u>	<u>No. of Establishments</u>	<u>As % of Total</u>
Ontario .....	110,126	33.3	4,954	32.3	269	29.2
Québec .....	80,397	24.4	4,412	28.8	346	37.5
British Columbia .....	57,005	17.3	2,112	13.8	123	13.3
Alberta .....	54,097	16.4	2,119	13.8	69	7.5
Manitoba .....	10,815	3.3	684	4.5	33	3.6
All Other .....	17,624	5.3	1,051	6.8	82	8.9
	<u>330,064</u>	<u>100.0</u>	<u>15,332</u>	<u>100.0</u>	<u>922</u>	<u>100.0</u>

<sup>1</sup>Source: Statistics Canada Catalogue #35-205 "Sash, Door and Other Millwork Plants", Annual Census of Manufactures



**APPENDIX C1**  
**SELECTED PRINCIPAL STATISTICS**  
**UNITED STATES MILLWORK INDUSTRY 1961-1967<sup>1</sup>**

Year	Estab. No.	EMPLOYMENT <sup>2</sup>		PAYROLL		Value of Shipments (own mer.) (\$ Million)	Cost of Materials <sup>3</sup> (\$ Million)	Value Added (own mfr.) (\$ Million)
		Total Activity (000)	Mfg. Activity (000)	Prod'n Workers (\$ Million)	All Employees (\$ Million)			
1967 .....	3,891	81.1	65.8	335.3	475.6	1,966.1	1,140.6	827.3
1966 .....	..	79.6	63.2	307.2	437.5	1,816.3	1,086.7	734.3
1965 .....	..	82.6	65.8	309.8	439.8	1,873.1	1,127.1	743.3
1964 .....	..	82.9	65.6	297.5	417.2	1,781.2	1,064.4	719.6
1963 .....	4,329	81.1	65.1	290.9	401.9	1,673.9	999.2	680.6
1962 .....	..	72.1	60.3	240.1	345.1	1,433.8	891.6	545.6
1961 .....	..	72.5	60.3	236.1	339.1	1,383.9	855.8	527.3

<sup>1</sup>Source: U.S. Bureau of the Census, "Annual Survey of Manufactures 1967", U.S. Government Printing Office, Washington D.C.

<sup>2</sup>Does Not Include Working Owners and Partners

<sup>3</sup>Includes Cost of Fuel and Electricity Consumed

# APPENDIX C2

## SELECTED PRINCIPAL STATISTICS BY INDUSTRY SPECIALIZATION AND PRIMARY PRODUCT SPECIALIZATION UNITED STATES MILLWORK INDUSTRY 1967<sup>1</sup>

	Estab. No.	EMPLOYMENT <sup>2</sup>		Value of Shipments (own mer.) (\$ Million)	Value Added (own mfr.) (\$ Million)
		Prod'n Workers (000)	All Employees (000)		
Millwork Plants Except Those Mfg. Prefab. Structures					
Entire Industry . . . . .	3,342	53.9	64.8	1,472.4	636.4
Establishments with 75% or more Specialization . . . . .	3,219	47.4	56.8	1,312.2	565.3
Wood Doors, Interior and Exterior					
Primary Product of Establishment . . . . .	180	11.2	13.4	327.1	128.0
Establishments with 75% or more Specialization . . . . .	100	5.3	6.3	184.7	64.1
Wood Window Units					
Primary Product of Establishment . . . . .	88	5.9	7.6	200.1	92.1
Establishments with 75% or more Specialization . . . . .	38	2.4	3.2	111.4	44.9
Finished Wood Mouldings					
Primary Product of Establishment . . . . .	131	6.0	6.7	170.3	67.7
Establishments with 75% or more Specialization . . . . .	98	4.0	4.4	119.1	45.2
Cabinetwork, to be built in					
Primary Product of Establishment . . . . .	474	7.8	9.9	188.6	95.2
Establishments with 75% or more Specialization . . . . .	310	4.8	5.9	104.9	56.4

<sup>1</sup>Source: U.S. Bureau of the Census, "Annual Survey of Manufactures 1967" U.S. Government Printing Office, Washington D.C.

<sup>2</sup>Does not include Working Owners and Partners

# APPENDIX D1

## VALUE OF SHIPMENTS OF GOODS OF OWN MANUFACTURE – CANADIAN MILLWORK INDUSTRY<sup>1</sup> (\$000)

	1969	1968	1967	1966	1965	1964	1963	1962	1961
<b>DOORS, WOODEN</b>									
Flush Type									
Industrial, 1-3/4" Plywood Finish .....	8,350	8,455	6,807	8,438	7,853	7,214	5,754		
Industrial, 1-3/4" Plastic Finish .....	2,028	1,365	1,755	1,006	908	516	397		
Residential, 1-3/8" Excl. Bifold .....	17,209	16,811	14,857	13,066	13,841	10,127	10,074	20,712	18,793
Bifold, Excl. Louvre .....	3,207	2,448	2,577	2,935	2,299	2,204	920		
Bifold, Louvre .....	2,973	2,808	2,659	2,695	2,137	3,325	512		
Panel and Combination Doors .....	4,187	3,380	3,126	3,752	3,119	2,364	1,777		
Pre-Hung Doors .....	4,565	3,870	3,199	1,893	(2)	(2)	(2)	7,553	7,055
Garage Doors .....	4,796	4,764	5,839	3,793	3,151	2,706	2,052		
Other Wooden Doors .....	4,991	4,053	3,524	2,873	4,488	5,820	4,081		
<b>Total Doors .....</b>	<b>52,306</b>	<b>47,954</b>	<b>44,343</b>	<b>40,451</b>	<b>37,796</b>	<b>34,276</b>	<b>25,567</b>	<b>28,265</b>	<b>25,848</b>
<b>WINDOWS</b>									
Wooden, Metal Covered, All Kinds .....	3,970	3,998	3,531	5,098	5,127	6,492	4,870	..	..
Wooden, Sashless, Panoramic, Double-Hung Etc. ....	26,403	27,734	26,167	22,247	19,836	17,471	18,334	..	..
Wooden Window Sash, Storm Screen, Etc. ....	10,301	7,032	8,713	10,137	10,452	9,771	13,279	..	..
<b>Total Windows (Incl. Sash) .....</b>	<b>40,674</b>	<b>38,764</b>	<b>38,411</b>	<b>37,482</b>	<b>35,415</b>	<b>33,734</b>	<b>36,483</b>	<b>35,440</b>	<b>33,276</b>
<b>WOODEN FRAMES, DOOR OR WINDOW .....</b>	<b>7,231</b>	<b>8,159</b>	<b>7,079</b>	<b>7,506</b>	<b>6,750</b>	<b>7,699</b>	<b>6,027</b>	<b>8,871</b>	<b>7,708</b>
<b>PREFABRICATED WOOD STRUCTURES</b>									
Ready-Cut & Factory Built (Wood Frame Bldgs.)									
Houses .....	50,292	29,714	30,685	29,048					
Cottages .....	8,131	9,810	6,451	3,712	23,998	21,965	16,418	15,765	16,395
Other Buildings .....	34,346	20,469	23,925	14,977					
Wooden Roof Trusses .....	3,631	3,675	3,915	3,050	1,611	1,517	928	(3)	(3)
Laminated Structures .....	11,319	9,517	11,593	14,956	11,149	8,467	8,252	11,205	11,461
Stairs .....	1,588	1,263	989	773	491	392	(3)	(3)	(3)
<b>Total Prefab. Wood Structures .....</b>	<b>109,307</b>	<b>74,448</b>	<b>77,558</b>	<b>66,516</b>	<b>37,249</b>	<b>32,341</b>			

APPENDIX D1 (continued)

VALUE OF SHIPMENTS OF GOODS OR OWN MANUFACTURE – CANADIAN MILLWORK INDUSTRY<sup>1</sup>  
(\$000)

	1969	1968	1967	1966	1965	1964	1963	1962	1961
FURNITURE									
School .....	4,050	3,447	3,566	2,128	1,636	2,083	1,518		
Hotel, Restaurant and Store .....	2,706	2,152	1,578	854	904	486	191	4,390	3,790
Church .....	398	558	417	452	661	655	606		
Furniture for Other Public Bldg. ....	1,145	1,805	4,169	3,875	2,421	2,023	2,058		
Household .....	1,717	1,347	428	221	375	244	219	321	246
All Other Furniture .....	3,459	2,881	2,973	2,347	2,778	2,480	2,255	1,653	1,143
Total Furniture .....	13,475	12,190	13,131	9,877	8,775	7,971	6,847	6,364	5,179
MOULDINGS .....	22,527	20,118	19,765	17,296	15,564	16,731	12,319	13,791	12,030
WOODEN KITCHEN UNITS OR CABINETS ....	37,652	31,695	24,392	22,485	19,940	16,750	13,116	10,159	8,285
PALLETS .....	556	1,497	1,964	1,890	465	231	208	201	(3)
ALL OTHER MILLWORK PRODUCTS <sup>4</sup> .....	46,656	34,411	28,822	28,443	26,061	34,337	36,128	25,512	22,869
TOTAL MILLWORK PRODUCTS .....	330,384	269,236	255,465	231,946	188,015	184,070	162,293	155,573	143,051
Amount Received for Work Done on Goods and Materials Owned by Others .....	2,684	2,768	3,505	3,756	2,460	2,001	2,257	2,223	3,399
TOTAL VALUE OF SHIPMENTS AND WORK DONE .....	330,064	270,109	254,766	233,766	189,461	185,461	164,073	158,358	152,556

<sup>1</sup>Source: Statistics Canada Catalogue #35-205 "Sash, Door and Other Millwork Plants", Annual Census of Manufacturers

<sup>2</sup>Not Available – Included in "Other Wooden Doors" Grouping

<sup>3</sup>Not Available – Included in "All Other Millwork Products" Grouping

<sup>4</sup>Includes Boxes and Containers, Lumber Cores, Wood Turnings, Sawdust etc.

<sup>5</sup>Adjusted for Taxes and Other Charges Which Could Not Be Deducted From Individual Commodity Items Described

# APPENDIX D2

## UNIT VOLUME OF SHIPMENTS BY THE CANADIAN MILLWORK INDUSTRY

### SELECTED PRODUCTS<sup>1</sup>

	<u>1969</u>	<u>1968</u>	<u>1967</u>	<u>1966</u>	<u>1965</u>	<u>1964</u>	<u>1963</u>
<b>Doors, WOODEN</b>							
Flush Type							
Industrial 1-3/4" Plywood Finish . . . . .	511,807	551,991	422,966	558,157	512,799	471,709	320,567
Industrial 1-3/4" Plastic Finish . . . . .	39,785	29,505	42,734	24,813	24,372	12,758	13,418
Residential 1-3/8" Excl. Bifold . . . . .	2,672,066	2,745,851	2,505,288	2,179,649	2,556,562	1,827,141	1,587,252
Bifold, Excl. Louvre . . . . .	470,727	401,781	409,472	433,690	299,771	336,298	136,492
Bifold, Louvre . . . . .	346,170	335,681	279,228	279,043	238,164	300,670	59,423
Panel and Combination Doors . . . . .	202,169	171,445	168,383	232,163	198,898	163,908	112,759
Pre-Hung Doors . . . . .	219,322	216,062	174,060	99,764	..	..	..
Garage Doors . . . . .	33,727	32,057	36,606	33,610	30,120	24,071	19,315
<b>Windows</b>							
Wooden, Metal Covered (all) . . . . .	106,399	127,020	132,772	163,680	179,018	236,894	158,582
Wooden, Sashless . . . . .	764,219	865,542	833,766	707,264	589,562	575,303	556,820
<b>Pallets</b> . . . . .	169,627	519,476	757,788	754,190	186,159	75,054	67,862

<sup>1</sup>Source: Statistics Canada Catalogue #35-205 "Sash, Door and Other Millwork Plants", Annual Census of Manufactures

APPENDIX E  
MATERIALS USED BY THE CANADIAN  
MILLWORK INDUSTRY<sup>1</sup>

Material	Quantity	1969 <sup>2</sup>		Quantity	1968 <sup>2</sup>		Quantity	1967 <sup>2</sup>		Quantity	1966 <sup>2</sup>	
		Value (\$000)	% Total Costs		Value (\$000)	% Total Costs		Value (\$000)	% Total Costs		Value (\$000)	% Total Costs
Lumber												
Rough or Planed . . . .	'000 ft. b.m.			'000 ft. b.m.			'000 ft. b.m.			'000 ft. b.m.		
Softwood . . . . .	358,458	51,781	37.4	319,841	43,601	35.7	345,296	43,405	34.8	342,122	42,789	36.1
Hardwood . . . . .	42,208	9,097	6.6	41,201	7,265	6.0	51,616	8,600	6.9	48,137	7,908	6.7
Plywoods	'000 sq. ft.			'000 sq. ft.			'000 sq. ft.			'000 sq. ft.		
Softwood . . . . .	80,434	9,542	6.9	68,907	8,207	6.7	81,471	9,375	7.5	98,220	10,474	8.8
Hardwood . . . . .	93,087	10,840	7.8	100,244	10,367	8.5	77,456	10,412	8.3	64,264	7,975	6.7
Veneers												
Softwood . . . . .	9,267	812	.6	10,096	666	.5	9,780	581	.5	15,992	662	.6
Hardwood . . . . .	12,023	879	.6	17,956	1,054	.9	63,459	1,538	1.2	109,206	2,113	1.8
Plastic Board . . . . .	10,254	3,727	2.7	7,114	2,705	2.2	7,658	2,984	2.4	7,752	3,316	2.8
Hardboard . . . . .	36,552	2,122	1.5	36,516	2,247	1.8	30,878	1,908	1.5	31,857	1,862	1.6
Particle Board . . . . .	10,909	1,924	1.4	9,085	1,460	1.2	7,230	1,300	1.0	7,726	1,557	1.3
Glass . . . . .	..	7,560	5.4	..	7,027	5.8	..	7,374	5.9	..	7,058	6.0
Hardware . . . . .	..	7,481	5.4	..	6,251	5.1	..	6,544	5.2	..	7,927	6.7
Aluminum . . . . .	..	3,092	2.2	..	2,741	2.2	..	3,036	2.4	..	2,074	1.8
Other Metals												
(all forms) . . . . .	..	2,823	2.0	..	2,845	2.3	..	2,095	1.7	..	2,122	1.8
Adhesives												
(all kinds) . . . . .	..	1,460	1.0	..	1,327	1.1	..	1,565	1.3	..	1,863	1.6
Doors												
(all kinds) . . . . .	..	3,053	2.2	..	1,719	1.4	..	..	..	..	..	..
Window Units												
(all kinds) . . . . .	..	2,007	1.4	..	1,518	1.2	..	..	..	..	..	..

<sup>1</sup>Source: Statistics Canada Catalogue #35-205 "Sash, Door and Other Millwork Plants", Annual Census of Manufactures. Only large establishments report costs in detail

<sup>2</sup>Refers only to materials expenditures by large establishments reporting such costs in detail

# APPENDIX F1

## TREND INDEXES FOR THE CANADIAN AND AMERICAN MILLWORK INDUSTRIES AND ALL CANADIAN MANUFACTURING INDUSTRIES

### TOTAL EMPLOYEES INDEX<sup>1</sup>

	<u>1961</u>	<u>1962</u>	<u>1963</u>	<u>1964</u>	<u>1965</u>	<u>1966</u>	<u>1967</u>	<u>1968</u>	<u>1969</u>
Canadian Millwork Industry .....	100	99	97	101	102	109	115	114	119
American Millwork Industry .....	100	99	112	114	114	110	112	--	--
All Canadian Mfg. Industries .....	100	103	105	110	116	121	122	121	--

### VALUE OF SHIPMENTS OWN MANUFACTURE INDEX<sup>1</sup>

Canadian Millwork Industry .....	100	104	108	121	123	153	167	177	216
American Millwork Industry .....	100	104	121	129	135	131	142	--	--
All Canadian Mfg. Industries .....	100	110	120	132	145	159	166	179	--

### VALUE ADDED PER EMPLOYEE INDEX<sup>2</sup>

Canadian Millwork Industry .....	100	105	110	116	120	136	139	146	167
American Millwork Industry .....	100	104	115	118	123	126	140	--	--
All Canadian Mfg. Industries .....	100	107	112	118	125	130	136	148	--

<sup>1</sup>Source: Appendices B1, C1 and Manufacturing Industries of Canada, All Canadian Manufacturing Industries.

<sup>2</sup>Source: Table 12

**APPENDIX F2**  
**PRODUCTIVITY INDEXES<sup>1</sup>**  
**(1961=100)**

Index of Production/Production Worker

Year	Canadian Millwork Industry	U.S. Millwork Industry	All Canadian Mfg. Industries
1969 .....	180	..	..
1968 .....	153	..	146
1967 .....	142	131	135
1966 .....	137	126	129
1965 .....	119	124	123
1964 .....	118	119	118
1963 .....	107	113	112
1962 .....	102	104	106
1961 .....	100	100	100

Index of Value Added/Production Worker

1969 .....	171	..	..
1968 .....	148	..	143
1967 .....	138	145	132
1966 .....	133	133	126
1965 .....	120	130	121
1964 .....	116	126	116
1963 .....	108	121	110
1962 .....	102	103	106
1961 .....	100	100	100

<sup>1</sup>Source: Labour Productivity  
 Labour Productivity as measured by value added.



# APPENDIX G1

## U.S. EXPORTS OF MILLWORK BY COMMODITY AND COUNTRY OF DESTINATION<sup>1</sup> (\$000)

### WOOD DOORS (CLASSIFICATION #6324020)

	Canada	Bahamas	Bermuda	Jamaica	N. Antill.	Barbados	Lee & W.W. Islands	Mexico	E.E.C.	Sweden	Denmark	Japan	All Other Countries	Totals
1970 ..	813	531	108	66	76	34	73	78	37	71	76	21	381	2,351
1969 ..	810	670	43	87	90	58	65	153	30	117	..	..	460	2,583
1968 ..	928	623	36	42	39	55	65	68	128	140	23	..	382	2,529
1967 ..	877	583	50	41	80	27	53	53	64	128	48	..	356	2,360
1966 ..	760	507	24	41	15	23	64	47	28	97	30	16	394	2,046
1965 ..	595	366	26	32	17	38	24	26	19	61	27	35	290	1,556
1964 <sup>2</sup> ..	612	261	28	14	4	6	27	18	73	5	..	13	328	1,389

### WINDOW UNITS AND SASH (CLASSIFICATION #6324010)

1970 ..	1,241	30	22	..	..	..	..	..	..	..	..	..	48	1,341
1969 ..	1,409	27	61	..	..	..	..	..	21	..	..	..	53	1,571
1968 ..	1,530	99	21	12	..	..	14	15	..	..	..	12	75	1,778
1967 ..	1,514	35	43	13	..	..	12	..	..	..	..	..	43	1,660
1966 ..	1,318	48	33	..	..	..	..	13	..	..	..	..	46	1,458
1965 ..	1,692	15	19	..	..	..	..	..	..	..	..	16	37	1,779
1964 ..	1,197	5	27	3	..	..	..	5	1	..	..	..	1	1,239

### MILLWORK N.E.C. (CLASSIFICATION #6324030)

1970 <sup>3</sup> ..	462	745	17	137	323	15	17	20	51	30	..	..	527	2,344
1969 ..	656	1,936	15	98	74	..	53	28	28	..	..	..	384	3,272
1968 ..	598	1,493	..	31	50	..	20	48	..	..	..	..	701	2,940
1967 ..	555	1,090	..	48	32	..	31	21	16	..	..	..	316	2,109
1966 ..	405	662	..	17	28	12	44	..	..	..	..	..	181	1,349
1965 ..	620	613	26	32	..	..	13	..	..	..	..	20	212	1,536
1964 ..	1,090	608	57	18	6	1	40	25	7	1	..	16	369	2,239

<sup>1</sup>Source: U.S. Bureau of the Census, "U.S. Exports—Schedule B Commodity and Country, Report FT 410" December 1964-1970, U.S. Government Printing Office, Washington D.C.

<sup>2</sup>Includes Metal-Clad Doors

<sup>3</sup>Includes Window and Door Frames Which Were Broken Out as a Separate Category in U.S. Export Statistics in 1970

# APPENDIX G2

## U.S. IMPORTS OF MILLWORK BY COMMODITY AND SOURCE COUNTRY<sup>1</sup> (\$000)

### WOOD MOULDINGS, STANDARD SOFTWOOD, NOT DRILLED OR TREATED (CLASSIFICATION #6318720)

	Canada	Mexico	Brazil	Colombia	Philippines	Taiwan	Spain	Japan	All Other Countries	Totals
1970 .....	989	9,116	688	250	..	..	2	..	32	11,077
1969 .....	1,030	9,447	597	234	..	..	..	..	24	11,332
1968 .....	646	6,657	421	333	..	..	1	..	1	8,059
1967 .....	505	5,512	278	58	..	..	..	..	5	6,358
1966 .....	754	5,923	253	6	..	10	2	5	9	6,962
1965 .....	579	7,369	208	19	3	2	..	25	2	8,207
1964 .....	680	7,540	101	8	2	..	..	6	1	8,338

### WOOD MOULDINGS, STANDARD HARDWOOD, NOT DRILLED OR TREATED (CLASSIFICATION #6318740)

1970 .....	158	..	57	1,141	561	398	..	454	865	3,635
1969 .....	258	4	26	920	604	590	..	921	748	4,071
1968 .....	227	4	56	667	613	448	..	952	327	3,294
1967 .....	155	8	6	624	508	239	..	904	179	2,623
1966 .....	57	..	15	533	542	104	..	1,169	222	2,642
1965 .....	46	22	..	328	436	86	..	983	207	2,108
1964 .....	41	..	..	355	587	3	..	1,198	238	2,422

### WOOD DOORS, WITH OR WITHOUT HARDWARE (CLASSIFICATION #6324040)

1970 .....	429	1,895	8	210	48	1,188	341	319	257	4,695
1969 .....	508	2,139	24	262	20	1,298	845	522	148	5,766
1968 .....	589	1,830	7	138	21	675	273	412	157	4,102
1967 .....	347	939	5	86	17	177	210	254	55	2,090
1966 .....	310	131	15	113	10	109	109	42	60	899
1965 .....	316	66	..	241	30	116	95	74	24	962
1964 .....	293	32	..	47	22	93	73	114	17	691

<sup>1</sup>Source: U.S. Bureau of the Census, "U.S. Imports — General and Consumption, Schedule A Commodity and Country, Report FT 135"  
December 1964 — 1970, U.S. Government Printing Office, Washington D.C.

# APPENDIX H1

## CANADIAN EXPORTS OF MILLWORK BY COMMODITY AND COUNTRY OF DESTINATION<sup>1</sup> (\$000)

### DOORS OF WOOD (CLASSIFICATION #336-09)

	U.S.	Britain	Bermuda	Barbados	Jamaica	Bahamas	Lee & W.W. Islands	St. Pierre Miquelon	E.E.C.	All Other Countries	Totals
1970 .....	461	46	76	101	..	8	35	5	..	7	739
1969 .....	638	84	25	23	7	1	8	6	2	14	808
1968 .....	713	42	37	22	6	..	7	7	10	8	852
1967 .....	429	46	33	6	11	21	3	7	..	3	559
1966 .....	373	34	35	..	7	..	..	6	..	3	458
1965 .....	383	8	29	..	37	..	3	4	..	3	467
1964 .....	361	9	36	..	26	..	2	2	..	1	437
1963 .....	269	1	30	..	4	..	1	1	..	6	312
1962 .....	175	..	14	..	2	..	..	1	..	..	193
1961 .....	209	..	8	..	1	..	1	1	..	10	220

### MILLWORK N.E.S. (CLASSIFICATION #336-99)

	U.S.	Britain	Bermuda	Barbados	Jamaica	Bahamas	Lee & W.W. Islands	St. Pierre Miquelon	E.E.C.	All Other Countries	Totals
1970 .....	1,426	335	17	1	1	5	13	16	4	4	1,822
1969 .....	1,558	90	8	..	1	..	4	10	1	2	1,674
1968 .....	1,219	85	22	..	..	..	2	12	1	8	1,349
1967 .....	665	122	12	..	..	..	1	10	1	13	824
1966 .....	870	46	27	..	..	5	..	10	..	5	958
1965 .....	529	15	7	..	12	..	..	8	3	1	575
1964 .....	514	37	27	..	4	..	6	7	..	2	597
1963 .....	140	..	2	..	..	..	3	3	..	3	151
1962 .....	68	1	12	..	..	..	..	..	3	1	85
1961 .....	100	..	2	..	..	..	..	..	..	3	103

<sup>1</sup>Source: Statistics Canada Catalogue #65-004 "Trade of Canada — Exports by Commodities" December Issues 1961-1970

# APPENDIX H2

## CANADIAN IMPORTS OF MILLWORK BY COMMODITY AND SOURCE COUNTRY<sup>1</sup> (\$000)

### DOORS OF WOOD (CLASSIFICATION #336-09)

	U.S.	Taiwan	Japan	Malaysia	All Other Countries	Totals
1970 .....	700	72	83	..	27	882
1969 .....	640	94	23	..	5	762
1968 .....	622	48	11	..	..	681
1967 .....	405	77	35	..	1	518
1966 .....	512	35	17	..	..	564
1965 .....	393	40	14	..	2	449
1964 .....	369	57	10	..	5	441

### WINDOWS, DOOR AND WINDOW FRAMES, WOOD (CLASSIFICATION #336-35)

1970 .....	1,348	25	..	39	27	1,439
1969 .....	1,784	65	..	51	4	1,904
1968 .....	1,873	55	..	10	12	1,950
1967 .....	1,914	29	7	..	5	1,955
1966 .....	1,794	41	4	..	5	1,844
1965 .....	1,952	11	9	..	1	1,972
1964 .....	1,814	..	2	..	1	1,816

### MILLWORK N.E.S. (CLASSIFICATION #336-99)

1970 .....	2,381	136	146	..	29	2,692
1969 .....	3,053	305	266	..	6	3,630
1968 .....	1,484	96	153	..	5	1,738
1967 .....	754	95	151	..	10	1,010
1966 .....	568	191	154	..	28	941
1965 .....	420	84	206	..	17	727
1964 .....	286	94	193	..	19	592

<sup>1</sup>Source: Statistics Canada Catalogue #65-007 "Trade of Canada — Imports by Commodities"  
December Issues 1964-1970

# APPENDIX I1

## CUSTOMS DUTIES ON SELECTED MILLWORK PRODUCTS IN CANADA<sup>1</sup>

Item	Tariff Classification Number	Most-Favoured-Nation Duty
1. Wood Doors (not less than 6 ft. high by 2 ft. wide) . . . . .	50610-1	15%
2. Wood Windows and Sash (unassembled only) . . . . .	50600-1	15%
3. Wood Mouldings:		
(a) untreated and of same profile throughout . . . . .	50045-1	free
(b) all other . . . . .	50075-1	10%
4. Cabinets or Store Furniture of Wood <sup>2</sup> . . . . .	51901-1	20%

<sup>1</sup>Source: Canadian Customs Tariff Schedule A. Mill products not listed above would probably fall into the general wood manufactures category and be subject to a charge of 15% ad valorem. A different rate could apply, however, if the component material of chief value were not wood.

<sup>2</sup>Would include kitchen units and cabinets.

## APPENDIX 12

### CUSTOMS DUTIES ON SELECTED MILLWORK PRODUCTS IN THE UNITED STATES<sup>1</sup>

<u>Item</u>	<u>Tariff Classification Number</u>	<u>Most-Favoured-Nation Duty</u>
1. Wood Mouldings		
(a) Standard, untreated		
(i) pine . . . . .	202.62	1.5%
(ii) other . . . . .	202.64	free
(b) All other (incl. pre-finished). . . . .	202.66	8.5%
2. Wood Doors, with or without hardware . . . . .	206.30	7.5%
3. Furniture of Wood, other than chairs <sup>2</sup>		
(a) assembled units. . . . .	727.35	5.0%
(b) parts . . . . .	727.40	8.5%

<sup>1</sup>Source: U.S. Tariff Commission Publication 304, "Tariff Schedules of the United States Annotated (1970)", U.S. Government Printing Office, Washington D.C.

<sup>2</sup>Refers to household, institutional and office furniture which is designed to be fixed or fastened to a floor or wall. Included are kitchen units and cabinets.

# APPENDIX 13

## CUSTOMS DUTIES ON SELECTED MILLWORK PRODUCTS IN THE COMMONWEALTH CARIBBEAN<sup>1</sup>

<u>Country</u>	<u>Item</u>	<u>Tariff Number</u>	<u>Preferential Tariff<sup>2</sup></u>	<u>General Tariff<sup>3</sup></u>
<u>Trinidad and Tobago</u>	Builders' woodwork (doors, sashes, etc.)	632-03.01	15%	25%
	Blocks and Strips for Parquet Flooring	632-03.02	15%	25%
	Beadings and Mouldings	632-03.03	15%	25%
	Builders' woodwork n.e.s.	632-03.09	15%	25%

Note: Import licence required for prefabricated doors

<u>Jamaica</u>	Builders' woodwork (doors, mouldings, sash ready-cut wooden parts of buildings etc.)	632-03	10%	20%
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Note: Surtax of 10% of duty payable. Import licence required for doors (flush panel) of plywood

<u>Barbados</u>	Builders' woodwork (doors, sash, ready-cut wooden parts of buildings)			
	i) prefabricated buildings and their parts	632-4.41	10%	20%
	ii) other	632-4.42	10%	20%

Note: surtax of 20% of duty payable

<u>Bahamas</u>	Builders' woodwork		10%	20%
----------------	--------------------	--	-----	-----

Note: Emergency tax 7.5% ad valorem

<u>Bermuda</u>	Windows, doors and Jalousie blinds	632.38	5%	12.5%
	Other n.e.s.	632.96	15%	17.5%

<sup>1</sup>Source: Compiled by the Department of Industry, Trade and Commerce, Office of Area Relations . . . the ad valorem duties listed are levied on the c.i.f. value in all the Commonwealth Caribbean countries except Bermuda which levies its duties on the f.o.b. value

<sup>2</sup>The preferential tariff applies to imports from all other Commonwealth countries (including Canada) provided that the Commonwealth content is at least 25%

<sup>3</sup>The general tariff applies to imports from non-Commonwealth countries (e.g. the U.S.)

## APPENDIX J

### LIST OF ESTABLISHMENTS CLASSIFIED TO THE SASH, DOOR AND OTHER MILLWORK PLANTS INDUSTRY, 1970

(Does not include establishments classified to other industries,  
which as a secondary activity, manufacture products typical of this industry)

#### NEWFOUNDLAND

G.J. Scaplen, St. John's  
Newfoundland Hardwoods Ltd., St. John's  
Wallken Enterprises Limited, Mount Pearl  
Gilbert Lynch, Donovans  
George Belbin, New Chelsea  
Gilbert Kelly, Coley's Point  
Edward Corcoran's Carpentry Shop, Burin  
Chesley S. Davis, Glovertown  
Springdale Woodworking, Springdale

#### PRINCE EDWARD ISLAND

Mackay & Co., Murray River  
M.F. Shurman Co., Ltd., Summerside  
G.R. Richard & Co., Summerside  
McAskill Woodworking Limited,  
Charlottetown  
Island Woodworking Co., Ltd., Cornwall

#### NOVA SCOTIA

Arnold Purdy, Deep Brook  
Sydney Millwork Company, Sydney  
Westmount Woodworkers Ltd.,  
Westmount Sydney  
Greers Woodworking Co., Sydney  
Amherst Woodworking (Maritimes) Ltd.,  
Cooksville  
J.A. Richard & Son, Amherst  
Arcade Comeau, Comeauville  
Belliveau Supplies Co-op Ltd.,  
Belliveau Cove  
Nelson & Newell Woodworkers Ltd.,  
Spryfield  
Borden P. Kent Ltd., Dartmouth  
Bluenose Woodworkers, Dartmouth  
H.W. Whittier Sash & Door, Halifax County  
Michael Solowij, Enfield  
M.V. Rudolph Bldg. Supplies Ltd., Enfield  
H.W. Brady Limited, Bridgewater  
Boehner Woodworkers Ltd., West La Have

Maritime Mfgs & Contractors Ltd.,  
Mahone Bay  
Pleasant Supplies Ltd., Yarmouth  
N.A. Pottier, Yarmouth Co.

#### NEW BRUNSWICK

Mason & Risch Ltd., Woodstock  
Manufacture Chiasson & Hache Ltée,  
Lameque  
Allain Woodworker, Buctouche  
Elude Couturier Ltée, Edmundston  
L.C. Lebel & Fils, Edmundston  
Charles A. Spray, Chatham  
Poirier Woodworking, Newcastle  
Garnet R. Flower, Minto  
Delphus J. Mercier, Benjamin River  
Murray & Gregory Ltd., Saint John  
Clayton Woodworking, East Saint John  
A.A. Beaulieu Woodworking, Grand Falls  
Landry Woodworkers, Moncton  
Advance Enterprises Ltd., Moncton  
Edgar V. Cormier, Westmoreland County  
H & B Woodworkers Ltd., Salisbury  
Lockwood Manufacturers Limited, Scoudouc  
Mathias Landry, Robichaud  
Parlee's Working Ship, Fredericton  
G & T Woodworking Ltd., Millville  
S.M. White (Woodworking) Ltd., York  
County

#### QUÉBEC

Adrien Lévesque, Authier-Nord  
Armand Plante, Authier  
Holt Mfg. & Supply Reg'd, Lachute  
Noble's Woodwork & Supply Reg'd, Lachute  
Charlebois & Fils Ltée, Lachute  
Yves Campeau, Comté d'Argenteuil  
Menuiserie Rive Sud, Victoriaville  
Edmond D. Verville & Fils, Victoriaville



## APPENDIX J (cont'd)

### Québec (continued)

Cuisine Idéale Inc., Victoriaville	Gregg Cabinets Ltd., Chambly
Menuiserie Laurier Enr., Victoriaville	Cie Bélanger (1970) Inc., St-Hubert
Roland Boulanger & Cie Ltée, Warwick	Armand Blain, St-Hubert
Beco Inc., Warwick	Menuiserie Boucherville Enr., Boucherville
Lionel Lefebvre, Princeville	J.G. Lavoie & Fils Inc.,
Henri Poirier, Daveluyville	St-Bruno-de-Montardville
Elie Hamel, Victoriaville	Henri-Georges Ricard, Cap-de-la-Madeleine
Les Trusses Dufresne, Arthabasca	Perfection Wood Products Ltd.,
Jacques Corbeil, Ste-Rosalie	Cap-de-la-Madeleine
L.D.J. Inc., Ste-Rosalie, Comté de Bagot	Laminex Products Ltée., Québec 10
Les Portes Veilleux Inc., St-Georges-de-Beauce	Valco Métal Inc., Cap-de-la-Madeleine
Kennebec Wood Products (1966) Inc., Ville-St-Georges	Toiture Mauricienne Inc.,
Émilien Larivière, St-Georges-Ouest	Cap-de-la-Madeleine
Henri Bonneville & Fils Inc., Ste-Marie-de-Beauce	Les Industries J. Cardner Ltée., Grand'Mère
Aimé Gagné, St-Joseph-de-Beauce	Pierre Naud Inc., Ste-Thècle
Treffe Goulet & Fils Ltée., St-Joseph-de-Beauce	Habitation Mauricienne Inc., Ste-Marthe-du-Cap
Eudore Gagnon & Fils Ltée., Tring Joncton	P. Descoteaux, B.P. Valmont
La Menuiserie des Pins du Québec Ltée., Comté de Beauce	Gédéon Marcotte, St-Stanislas-de-Champlain
J.L. Vachon (1965) Ltée., St-Joseph-de-Beauce	Robert Lawrence, Ormstown,
Clermond Lessard Enr., St-Joseph	Comté de Chateauguay
A. Bougie & Fils Ltée., Valleyfield	La Cie de Fenêtres du Saguenay Inc., Chicoutimi
Adrien Rhéaume, Valleyfield	Adjutor Bergeron & Fils Ltée., Kenogami
Thibault Enr., Beauharnois	J.W. Verville Ltée., Chicoutimi Nord
Fenêtre Salaberry, St-Thimothée	René & Robert Asselin, Comté de Joliette
P.E. Bellehumeur & Fils Ltée., Berthierville	La Menuiserie d'East Angus Inc., East Angus
Adolphe Roberge Portes & Chassis, St-Gabriel-de-Brandon	Maurice Sanscartier Enr., St-Augustin,
Alexandre Tellier, St-Michel-des-Saints	Comté des Deux-Montagnes
Yvon Bordeleau, St-Michel-des-Saints	Jacques Aubin, St-Janvier
Fernand Rivest, St-Zénon	Lionel Laframboise, St-Benoit
Zénon Martin, St-Francois-d'Assise	J.E. Arbic & Fils, St-Eustache
Arthur Leblanc, Comté de Bonaventure	André Frénette Enr., St-Eustache
Les Entreprises Dugas Enr., Maria	Julien Lemay, St-Eustache
Duhamel Roussy, Comté de Bonaventure	Jean L'Écuyer Enr.,
Russell Campbell, New Richmond	Comté des Deux-Montagnes
Camille Arsénault, Bonaventure	Durand Industrie Enr., St-Canut
Denis Maltais Portes & Armoires, Cité-de-Jacques-Cartier	Menuiserie de Scott Inc., Scott-Jonction
Léon Dionne Enr., Ville-Jacques-Cartier	Fernand Flamand Ltée., Ste-Hénédine,
South Shore Moulding Reg'd., St-Hubert	Comté de Dorchester
	Daniel Nadeau Enr., St-Léon-Standon
	R. Vaillancourt et Fils Ltée., Drummondville
	Grégoire Fontaine, St-Simon-de-Drummond
	Tharcisius Lyonnais,
	St-Cyrille-de-Wendover
	Thomas Caya Inc., Bon-Conseil

## APPENDIX J (cont'd)

### Québec (continued)

Frontenac Plywood Door Co., Lac-Mégantic  
 Lambion Mfg., Ltd., Lambion  
 Léo Grondin, Lac-Mégantic  
 Fernand Nadeau,  
     St-Méthode-de-Frontenac  
 Gérard Moreau, Comté de Gaspé Sud  
 Gérard Coté, Petite-Anse  
 Mercier & Frère Enr., Grande-Rivière-Ouest  
 Conisart Ltd., Hull  
 Lalanco Ltée., Pointe-Gatineau  
 Migneault Ltée., Gatineau  
 Coronet Cabinet, Templeton  
 Orpha Coupal Inc., Henryville  
 Les Entreprises Pélo Ltée., Frontenac  
 Longpré & Frère, Joliette  
 Marcel Rose, St-Félix-de-Valois  
 J. Noël Breault, Notre-Dame-de-Lourdes  
 Napoléon Chevrette, St-Come,  
     Comté de Joliette  
 Charles Auguste Deziel, St-Thomas  
 Richard Meilleur, Ferme-Neuve  
 Menuiserie Nomingue Enr.,  
     Comté de Labelle  
 Josaphat Fortin, Alma  
 Hermenegilde Tremblay Enr., St-Joseph-  
     D'Alma  
 Industrie Guay, Delisle  
 Truchon & Fils Ltée., Comté Lac St-Jean  
 Roof Truss Inc., Laprairie  
 André Sénécal, Laprairie  
 Marcel Doucet Enr., Laprairie  
 Jules Halo, Notre-Dame-du-Sacre-Coeur  
 South Shore Kitchen Enr.,  
     Notre-Dame-du-Sacre-Coeur  
 Les Entreprises Marchand Ltée.,  
     Ste-Catherine-D'Alexandria  
 Lucien Poulin, Ville-des-Laurentides  
 Émilien Riopel, L'Épiphanie  
 A. Coutu Enr., Mascouche  
 La Menuiserie St. Henri Enr.,  
 E. Leclerc Enr., St-Roch-de-Lachigan  
 Menuiserie St. Paul Enr., St-Paul-L'Ermite  
 Les Moulures Ducharme Ltée.,  
     St-Paul-L'Ermite  
 Rhéaume Nantais, St-Sulpice  
 Les Moulures Lévis Ltée., Lauzon, Lévis

Louis Philippe Hamann, Lauzon  
 Location de Garages Olivier Inc.,  
     Saint-Romuald  
 Menuiserie Maurice Bernier Inc.,  
     Comté-de-Lévis  
 Jean-Eudes Valliers, St-David,  
     Comté-de-Lévis  
 Huot & Frères Industries Ltée., L'Islet  
     Comté de Lévis  
 Vaillancourt & Chouinard Ltée.,  
     Comté de L'Islet  
 J. Émile Gaudreault, L'Isletville  
 Son-O-Dor Leclerc Inc., L'Isletville  
 Armand Pelletier et Fils Enr., Ste-Perpétue  
 Armand Desrosiers Enr., Comté de L'Islet  
 Laurendeau & Frères Inc.,  
     St-Jean-Port-Joli  
 Les Industries Philius Flamand Ltée.,  
     St-Agapit  
 Magelle Chatigny, St-Agapit,  
     Comté-de-Lotbinière  
 Industrie Ferland & Faucker Inc.,  
     Comté-de-Lotbinière  
 R. Laflamme & Frère Inc., St-Apollinaire  
 P.A. Martineau Ltée., St-Gilles  
 T.P.L. Industries Ltd., Louisville  
 Brodeur & Baribeau Enr., St-Paulin  
 J.O. Paquet & Fils Enr., Louiseville  
 Jean Jacques Gagnon, St-Justin  
 J. Antoine Pineau, Matane  
 Atelier Matane Inc., Matane  
 J. Chrysostome Marcheterre, Les Boules  
 Yvon Laplante, Thetford Mines  
 Émile Fortier Inc., Thetford Mines  
 Les Boiserries Plessis Ltée., Plessisville  
 Lionel Simoneau, Lyster  
 Farnham Woodwork & Supplies Ltd., Farnham  
 Entreprises Val Laurent Ltée., Farnham  
 Bolduc & Gregoire Inc., Cowansville  
 Les Produits Bel-Air Enr., Cowansville  
 Bernard Bélisle, Stanbridge Station  
 Jean-Paul Coderre, St-Jacques-de-Montcalm  
 Jean Des Bois Inc., Comté de Terrebonne  
 Joseph Lacroix Portes & Chassis,  
     Comté-de-Montcalm  
 René Berthiaume, St-Donat-de-Montcalm

## APPENDIX J (cont'd)

### Québec (continued)

Jos. Alph. Fortin, Cap-Saint-Ignace  
 Marc Gagnon Enr., Cap-St-Ignace-Station  
 Giguère & Fils, Château-Richer  
 Caron & Guay, Ste-Anne-de-Beaupré  
 Ernest Couture, St-Féréol  
 Economic Door Ltd., Montréal  
 Paul Dumont Inc., St-Romuald  
 Landry Manufacturing, Montréal  
 Les Portes Veilleux & Laviolette Enr., Montréal  
 Benoit Et Mathieu Ltée., Montréal  
 St. Michel Flush Door Inc., Montréal  
 Model Woodwork Reg'd., Montréal  
 J.L. Maheu Ltée., Montréal  
 Duval & Gilbert Inc., Rivière-des-Prairies  
 Lucien Languerand, Montréal  
 Patterson & Riddell Woodcraft Reg'd.,  
 Roxboro  
 Armoires de Cuisine de Montréal Ltée.,  
 Montréal  
 Dominion Kitchen Supply Co., Montréal  
 Axwood Ltd., Montréal  
 Moulding Products Ltd., Montréal  
 Metro Door Co., Ltd.,  
 St-Laurent, Montréal  
 Imperial Overhead Door Co., Ltd., Montréal  
 Dorval Woodwork & Supplies Reg'd., Dorval  
 Delcraft Industries Inc., Pointe-Claire  
 Baltic Woodwork Co., Montréal  
 Metro Wood Doors Ltd., Montréal  
 Pigeon & Drapeau Ltée., Montréal  
 Atome Kitchen Supply Co., Ltd., Montréal  
 Menuiserie Ste-Geneviève Inc., Pierrefonds  
 Alphonse Lemany, Montréal  
 Pierre Laroche, St-Rémi  
 Omer Garand Portes & Chassis,  
 St-Rémi-de-Napierville  
 Clément Fortin, Napierville  
 Justras & Frères Enr., Nicolet  
 La Cie Lucien Leboeue Ltée.,  
 Comté de Nicolet  
 Germain Turcotte, St-Léonard-d'Aston  
 Roux & Frères Enr., Comté de Nicolet  
 Gerard Leblanc, Ste-Sophie-de-Levrard  
 Menuiserie De Masson Ltée., Masson  
 Théodore Mineault Mfg., Inc., Angers

Portneuf Plywood Inc.,  
 St-Basile-de-Portneuf  
 Fiset & Marcotte Inc.,  
 St-Basile-de-Portneuf  
 Marcel Laframboise Enr.,  
 St-Marc-des-Carrières  
 J. Gaudais Lapierre, Neuville  
 Industries Paquin Inc., Montauban  
 Menuiserie Gauvin Inc., Ste-Catherine  
 Les Portes P.A. Page Ltd., Montréal  
 A. Gignac Inc., Québec  
 Materio Inc., Québec  
 Industries St. Pascal Enr., Québec  
 Prémoulé Inc., Québec  
 Roméo Vachon Inc., Québec  
 Menuiserie Kebec Inc., Québec  
 Martel & Fils Enr., Giffard  
 Les Moulures Bégin Ltée., Giffard  
 Henri Barling, Ancienne Lorette  
 Paul Arthur Leclerc, Charlesbourg  
 Cuisines Francis Inc., Beauport  
 Gilles Moisan Inc., Québec  
 Albert Lauzier, Loretteville  
 Menuiserie J.P. Marcoux Inc., Lorette  
 Manufacturier de Réfrigérateur Commerciaux,  
 St-Émile  
 Paul Pauze & Fils Ltée., Ville-de-Tracy  
 J.E. Lemieux Ltée., Windsor  
 Robert & Robert Ltée.,  
 St-Francois-Xavier-de-Brompton  
 Jos Beaulieu & Fils Inc., Rimouski  
 Roland Rioux, Rimouski  
 Les Portes Modèles de Gaspésie Ltée.,  
 Mont-Joli, Comté de Matane  
 Aurelien Lebel, Mont-Joli  
 Gérard Lavoie & Fils Inc., Luceville  
 André Paquet, Luceville  
 Les Cuisines de Rimouski Enr., Rimouski  
 Georges Jean, St-Fabien  
 Marc Bélanger, Ste-Blandine  
 Armand Gladu, Marieville  
 Tessier Frère Enr., St-Césaire  
 Industries Sept-Îles Inc., Sept-Îles  
 Toitures Sept-Îles Enr., Sept-Îles  
 Claude Trembley, Comté de Saguenay

## APPENDIX J (cont'd)

### Québec (continued)

Hudon & Compagnat Inc., Granby	Terrebonne Flush Door Reg'd., Terrebonne
L'Industrie Lacasse Inc., Granby	Heroux & Fils Inc., Terrebonne
Viateur Lussier Portes & Chassis, Ste-Cécile-de-Milton	Leopold Limoges & Fils Ltée., Terrebonne
Collinsville Industries Inc., Sherbrooke	Canada Flushwood Door Mfg., Ltd., Terrebonne
La Menuiserie de l'Est Enr., Sherbrooke	Louis Page Inc., Rosemère
Bown Lumber Inc., Lennoxville	Pan-Mural Inc., Ville-de-Blainville
Paquette & Frères Enr., Ascot Corner	Arbour & Vidal Inc., Ste-Thérèse
Fernand Roy, Magog	Bisaillon Portes et Chassis Panoramiques Enr., Lac-Carré
Marcoux & Frère Enr., Coaticook-Nord	Jacques Piché Prop., Val-David
C.J.C. Ltée., St-Hyacinthe	Donat Leblanc, Ville-Lafontaine
Multiplex Inc., St-Hyacinthe	J.T. Cloutier (1970) Inc., Ste-Agathe-des-Monts
A. St. Germain & Fils Inc., St-Hyacinthe	Édouard Paquin, Comté de Terrebonne
Cuisine Maska Comté de St-Joseph	Lepine & Frères Enr., Ste-Anne-des-Plaines
Riviera Kitchen Reg'd., Ste-Madeleine	Industries Dorion Inc., Dorion, Comté de Vaudreuil
P.A. Page Doors Ltd., Montréal	Armand Dicaire & Co. Ltd., Dorion-Vaudreuil
Georges Élie Corriveau, St-Basile-de-Portneuf	Modern Kitchen Cupboard, Dorion-Vaudreuil
Jos Gingras & Fils Ltée., St-Damase	H & H Entreprises Ltd., Dorion, Comté de Vaudreuil
Jean-Bte Loiseau, St-Denis-sur-Richelieu	Menuiserie Ce-Be Enr., Vaudreuil
Barrière & Frère, St-Jean	Dorion Garage Doors Inc., Comté de Vaudreuil
Fortin & Frère Cie Ltée., St-Jean	St. Georges & Paquette, Beloeil
Amédée Roy & Fils Enr., St-Jean	Les Industries Turgeon & Fils Inc., Verchères
Samoisette & Frère Enr., St-Jean	Ernest Aubry, Verchères
Maurice Dufresne Enr., Trois-Rivières	Jacques A. Justras, La Baie
Paul Brien Enr., Trois-Rivières	Lucien Gasse, St-Guillaume-Station
Edmond Aucoin Enr., St-Boniface-de-Shawinigan	Les Entreprises Thermo Vision Inc., Comté de Chateauguay
Gérard Milette Portes & Chassis, St-Boniface	Philippe Vallancourt & Fils, Maniwaki
Henri Lesmerises, Trois-Rivières	Les Industries Pelletier Enr., Maniwaki
Bernardin Robitaille Inc., Rouyn	Jean Baptiste Bouchard, Amqui
Éleuthère Bastille, Sully	Raoul Turcotte, St-Noël
Joseph Madore, St-Louis-du-Ha-Ha	Roger Coulombe, St-Laurent-d'Orléans
Joseph Patoine, St-Honoré-de-Témiscouata	Armoires de Laval Enr., St-Vincent-de-Paul
Jacques Filiatrault, St-Jérôme, Comté de Terrebonne	Beau-Lab Company Ltd., Duvernay
La Cie De Fenêtres St-Jérôme Ltée., Comté de Terrebonne	D. D. Portes Enr., Laval
Armand Fillion & Fils, Comté de Terrebonne	Les Entreprises Warnet Ltée., Laval-des-Rapides
Jacques Magnan Inc., Comté de Terrebonne	
J. Bte. Charron Ltée., Ste-Thérèse-de-Blainville	
P.E. Maurice & Fils Cie Ltée., St-Antoine-des-Laurentides	
Docittie Deschênes, Terrebonne	

## APPENDIX J (cont'd)

### Québec (continued)

Entreprise Derlandres Inc.,  
Laval-des-Rapides  
Patrick Lauzon, Ste-Dorothée  
Les Industries Nouvelle Enr.,  
Laval-des-Rapides  
David & Fils Ltée., Chomedey  
Atelier de Menuiserie Laurentide, Chomedey  
Rapid Lumber & Mfg., (1969) Inc., Montréal  
Paul Émile Morin, Montréal  
Chomedey Industries Enr.,  
Ville-de-Laval  
Sefina Import Export Industries Ltd.,  
Ste-Rose  
Deschênes Flush Door Inc.,  
Laval-des-Rapides  
Alphonse Lepage Inc., Rivière-du-Loup  
Martin & Martin Enr., Trois-Pistoles  
Martin & Fils, Rivière-du-Loup  
Menuiserie Belisle, Rivière-du-Loup  
Murdock et Fils Ltée., Dolbeau  
Aurèle Nadeau, Dolbeau  
Jos Dufresne & Fils Ltée., St-Félicien  
Gérard Lemay, Chambord  
Paul Henri Lévesque, Normandin

### ONTARIO

Sanderson-Harold Company, Paris  
Custom Windows Ltd., Brantford  
Lloyd-Truax Limited, Wingham  
Port Elgin Cabinetmakers Ltd., Port Elgin  
David Needham, Kincardine  
D & M Fixtures, Ottawa  
Giuseppe Panarotto, Ottawa  
Chateauvert Doors, Ottawa  
Wick Products Ltd. Orleans  
Capital Roof Truss (1969) Limited, Ottawa  
Centennial Truss Fabricators Ltd., Hazeldean  
Modern Cabinet Industries of Ottawa Ltd.,  
Ottawa  
Shill-Brand Kitchens, Ottawa  
Frederick J. Dixon Interior Design Ltd.,  
Manotick  
Mason Windows (Ottawa) Limited, Stittsville  
Orangeville Kitchens Woodworking, Shelburne  
Dutch Sash & Door Co., Ltd., Morewood

Hollandia Woodworking, Orono  
Durham Cabinet & Woodworks, Newtonville  
Colonial Cabinets & Millwork, Windsor  
Feldman Window Mfg., Windsor  
Wm. Russell, Windsor  
Als Woodworking Limited, Windsor  
Dominion Cabinet Makers, Windsor  
Deluxe Woodwork, Windsor  
Tom's Woodwork, Windsor  
Italia Cabinet Makers, Windsor  
Guardian Cabinets, Windsor  
Pintus Cabinets, Windsor  
Cortina Construction of Windsor, Windsor  
Fontana Commercial Designs Limited, Windsor  
Heyme's Wood Products, Amherstburg  
Martindale Sash & Door, Belle River  
Doc's Woodcraft, Tecumseh  
Joe's Woodcraft of Windsor Ltd., Windsor  
Henry's Cabinets & Improvements,  
Leamington  
S. Anglin Co., Ltd., Kingston  
Jack Chapman, Kingston  
Alexandria Sash & Door Co., Ltd., Alexandria  
Marcel Pattyn Sash & Door, Alexandria  
Rustic Wood Canada Limited, Owen Sound  
M. Bottoset & Son, Windsor  
Hanover Kitchens (Canada) Ltd., Hanover  
Milan Furniture, Meaford  
Adolf Ratz Woodworking, Neustadt  
Di Pietro Cabinet Maker,  
Township of Seneca Caledonia  
Griffin Sash & Door, Haliburton  
National Millwork Company, Burlington  
N. Pollard & Son Ltd., Burlington  
J.V. Designs, Burlington  
Fitzpatrick Stair Limited, Burlington  
Mino Millwork, Georgetown  
Paul Sayers Lumber Co., Islington  
Trafalgar Woodworking, Oakville  
Whiting Manufacturing of Canada Ltd.,  
Oakville  
Creative Craft Enterprise, Oakville  
Karl's Woodworking, Oakville  
Twins Woodworking Ltd., Halton County  
John B. Kaufman Ltd., Milton  
Bob Peake Wood Products, Belleville

## APPENDIX J (cont'd)

### Ontario (continued)

A.W. Millwork Ltd., Trenton  
 Bancroft Lumber Limited, Bancroft  
 N. Bieman & Sons Custom Woodworking,  
     Foxboro  
 Lloyd-Truax Limited, Wingham  
 Dashwood Industries Ltd., Centralia  
 Wallaceburg Woodcraft, Wallaceburg  
 Nevermar Wood Products Limited,  
     Carleton Place  
 Brathwaite Manufacturing, Carleton Place  
 Locke Truss Co., Brockville  
 Blockland Woodworking, Brockville  
 F.J. Stanton & Son, Elgin  
 Beldman Cabinets, London  
 Parke Woodwork Ltd., London  
 Kernohan Lumber & Sash Co., Ltd.,  
     London  
 Laverne Kitchen Cabinets, London  
 T-N Cabinet & Millwork Co., Ltd.,  
     London  
 United Cabinetmakers, London  
 L & S Cabinets of Komoka Ltd., Komoka  
 Dan Scott Cabinets, Lambeth  
 London Roof Truss Ltd., London  
 Cardinal Sales of London Ltd., London  
 Robert Hunt Millwork Corp., Ltd., London  
     Fleetwood Cabinets Ltd., Dorchester  
 Centennial London Cabinets Ltd., London  
 Gebel Cabinets Ltd., Clandeboye  
 Dowdall Millwork Ltd., North Bay  
 Laidlaw Goodwood Industries Ltd., North Bay  
 Courtland Planing Mill Limited, Courtland  
 The R.H. Cabinet Co., Ltd., Oshawa  
 Craft Cabinets, Uxbridge  
 Redifit Wood Specialties Co., Ajax  
 Lake Scugog Lumber & Coal Co., Ltd.,  
     Port Perry  
 The RDL Company, Uxbridge  
 H.G. Designs Ltd., Pickering  
 Alpa Industries Limited, Pickering  
 Remco Laminated Wood Products, Woodstock  
 Viking Kitchen Design, Ingersoll  
 Anderson Millwork Limited, Sundridge  
 Fairline Products Ltd., Port Credit  
 Dominion Sash Ltd., Streetsville  
 Marlam Industries Ltd., Port Credit

Amherst Woodworking Ltd., Mississauga  
 P & I Kitchens Limited, Mississauga  
 Duraform Concrete Systems Limited, Malton  
 McKee Door of Canada Ltd., Cooksville  
 Danway Industries Limited, Mississauga  
 Firetite Mfg. & Holding Co., Ltd.,  
     Mississauga  
 Modu-Line Cabinet Special Ltd., Gadshill  
 Lancaster Sash & Door, Bobcaygeon  
 Whitler Crafts, Peterborough  
 Payne Sash and Door, Peterborough  
 Germain Desjardine Ltée., Hawkesbury  
 Yorktown Kitchen & Building Products,  
     Hamilton  
 Gerard Seguin, St. Eugene  
 Gregor Lemmermeyer, Belleville  
 Herrem Woodworkers Ltd., Fort Frances  
 A.F. Campbell & Son Ltd., Arnprior  
 Murdoch's Wood Products, Arnprior  
 Scheel Window Ltd., Arnprior  
 Guillemette Cabinets, Arnprior  
 Education Fitment & Millwork Company,  
     Arnprior  
 Valewood Products Limited, Renfrew  
 Leo Groulx, Casselman  
 Woodwork Unlimited, Barrie  
 Ron Wilson Woodworking, Alliston  
 Bon-A-Wood Industries, Alliston  
 Mulholland Wood Milling Co., Collingwood  
 Krupp Woodworking, Beeton  
 Sommers Woodworking Service, Barrie  
 Sudbury Planing Mill, Sudbury  
 L. Lamarche Cabinet Maker, Sudbury  
 Wanson Millwork Ltd., Thunder Bay  
 Ideal Woodcraft, Thunder Bay  
 Lakehead Cabinet & Builders Supplies,  
     Thunder Bay  
 K & D Building Products, Thunder Bay  
 A.R. Tufford Custom Woodwork, Lindsay  
 Ready Wood Products Limited, Lindsay  
 Gardiner's of Galt Ltd., Galt  
 Louis Beke, Galt  
 M. Bloos & Sons Custom Woodworking,  
     Kitchener  
 Stairco Limited, Kitchener  
 Golden Triangle Windows Ltd., Kitchener



## APPENDIX J (cont'd)

### Ontario (continued)

Custom Wooden Stairs, Kitchener	Decor Fireplaces & Accessories Ltd., Toronto
Interior Woodcraft, Waterloo	McKnight Window Industries Ltd., Downsview
Columbia Custom Cabinets, Waterloo	Canadian Mantel & Stone Co., Ltd., Downsview
Tamway Custom Cabinets Limited, Waterloo	International Office Partitions Ltd., Weston
Werner Schneider, Waterloo	Toronto Woodmoulding Ltd., Toronto
James Gillies & Son Ltd., Preston	Three Star Cabinet Mfg., Ltd., Toronto
Harry Felka Wood Products Ltd., Petersburg	United Window Manufacturers Ltd., Downsview
General Millwork & Supply, Guelph	Florida Kitchen Equipment Co., Ltd., Toronto
Muller Woodcraft Limited, Guelph	Norden Building Products Ltd., Weston
Nu-Way Kitchens, Guelph	Elm Woodwork Ltd., Downsview
Barzotti Woodworking Limited, Guelph	York Kitchen Equipment Ltd., Weston
Eric Hartwig, Clifford	Hudson Kitchen Manufacturing Co. Ltd., Downsview
R.G. Ashby Co., Ltd., Hamilton	Barbel Manufacturing Co., Ltd., Weston
Silhouette Cabinet Ltd., Hamilton	Super Structure Door Co. of Canada Ltd., Toronto
Crescent Cabinet Company, Hamilton	Normac Kitchens Limited, Willowdale
Truth Wood Products, Hamilton	Pine Lodge Limited, Toronto
Unibond Door Manufacturing Co., Ltd., Hamilton	G.B. Sales, Weston
Manor Building Products Ltd., Hamilton	Carpano Exclusive Kitchen & Cabinetry, Toronto
Saltfleet Wood Products, Fruitland	Domus Woodworking Ltd., Weston
The Consumers Millwork Co., Ltd., Stoney Creek	Downsview Door Products Ltd., Downsview
John Sustersic Enter Ltd., Stoney Creek	Format Home Products Ltd., Downsview
Gudgeon Cabinets Ltd., Stoney Creek	Doorco Products Ltd., Toronto
P & T Lumber Company, Stoney Creek	Roncarm Cabinets Limited, Scarborough
Sun-Lite Supply Co., Ltd., Hamilton	Modern Door Design Co., Scarborough
Brown Window Frames & Co., Limited, Toronto	Jones Wood Specialties Ltd., Scarborough
Penwood Mfg., Co., Ltd., Toronto	McBride Lumber Products Ltd., West Hill
York Woodworking Shop, Toronto	Columbia Home Products Ltd., Scarborough
Maydwell Mfg. Co., Ltd., Toronto	Premium Forest Products Ltd., Scarborough
Irpinia Carpentry Limited, Toronto	Dorset Woodcraft Co., Scarborough
Findlay Construction Ltd., Toronto	Mason Windows Limited, Agincourt
Frendel Prefab Kitchens Limited, Toronto	Abacus Mfg. Ltd., Scarborough
Matys Wood Products, Toronto	Ninos Custom Cabinets Ltd., Scarborough
T A R Box Mfg., Toronto	Weather-Seal Manufacturing Co., Ltd., Scarborough
Art Woodwork Contracting, Toronto	Trenco Design Cabinets Limited, Scarborough
Ontario Laminating Co., Toronto	
Canvas Art Mfg. Co., Toronto	
Falcon Carpentry, Toronto	
Triplast Mfg. Co., Ltd., Toronto	
Canadiana Woodworking, Toronto	
Holiday Kitchens, Toronto	
Oakwood Lumber & Millwork Co., Ltd., Downsview	

## APPENDIX J (cont'd)

### Ontario (continued)

Canada Woodcraft & Design, Scarborough  
 Centennial Kitchens, Scarborough  
 Raywal Limited, Thornhill  
 Central Woodworking, Willowdale  
 Orav Stairs, Thornhill  
 Conac Wood Products Limited, Willowdale  
 G & M Forest Products Ltd., Thornhill  
 Continental Kitchens Limited, Gormley  
 Keen Kitchens, Thornhill  
 F T N Woodworking, Concord  
 D & J Manufacturing Co., Limited, Islington  
 Neff Kitchen Manufacturers Ltd., Toronto  
 Riviera Kitchen Co., Toronto  
 John Zidner Custom Woodworking,  
 New Toronto  
 Oneida Kitchen Manufacturers, Toronto  
 Snowind Enterprises Ltd., Maple  
 Tor-Ply Manufacturing Co., Concord  
 Tor-O Wood Products, Toronto  
 Alex Door & Woodworking, Toronto  
 Nick Giacalone, Toronto  
 Carinci & Son Kitchen Cupboard Makers,  
 Toronto  
 Modular & Custom Cabinets Limited,  
 Toronto  
 Laidlaw Goodwood Industries Ltd., Weston  
 Valley Cabinets & Woodworking Co.,  
 Toronto  
 Catania European Designs, Scarborough  
 Woodoor Ltd., Aurora  
 Pine Cone Wood Products Limited,  
 Richmond Hill  
 Marcan Wood Specialties Co., Markham  
 Dodds Millwork (Thornhill) Ltd., Willowdale  
 Martin's Woodworking & Building Supplies,  
 Niagara Falls  
 Polman Cabinet Limited, Niagara Falls  
 Artistic Woodworking Co., Niagara Falls  
 Niagara Prefab Ltd., Niagara Falls  
 Atherton Woodworking Co., Ltd., Welland  
 Tradewood Industries Ltd., St. Catharines  
 Rigby's Ltd., St. Catharines  
 Linwell Wood Products Ltd., St. Catharines  
 Toderan Building Supply Ltd., St. Catharines  
 Karl Jensen, St. Catharines

Castle Construction Building Centre,  
 St. Catharines  
 Canadian Pre-Hung Door Mfg., Fonthill

### MANITOBA

C.T. Loewen & Sons Ltd., Steinbach  
 Henry H. Kehler, Niverville  
 Duecks Laminated Rafters, Rosenort  
 John Fehr, Thornhill  
 Dring Laminated Struction Ltd.,  
 Boissenvain  
 W. Ricks, Brandon  
 Denis Prefab Limited, Brandon  
 Zircon Cabinets, Brandon  
 Glu-Rite Products, Russell  
 Dauphin Cabinet, Dauphin  
 Sass Woodworking Shop, Winnipegosis  
 B & R Millwork Industries Ltd., Winnipeg  
 Yarrow Sash & Door Co., Winnipeg  
 General Sash (1970) Ltd., Winnipeg  
 Inkster Park Millwork Ltd., Winnipeg  
 Keystone Millwork Ltd., Winnipeg  
 Shore Glass & Building Supplies Ltd.,  
 Winnipeg  
 George Pernsteiner, Winnipeg  
 Central Cabinet Factory Ltd., Winnipeg  
 Dormond Industries Ltd., Winnipeg  
 Glenway Supply Ltd., Winnipeg  
 Hermann's Quality Woodwork, Winnipeg  
 Vincent Millwork Ltd., Winnipeg  
 Willmar Window Industries Ltd., Winnipeg  
 Elgin Cabinet Co., Ltd., Winnipeg  
 Dowse Woodwork Ltd., St. Boniface  
 United Sash Co., Ltd., St. Boniface  
 Newman Millwork Ltd., St. Boniface  
 Paramount Glass & Millwork Ltd., Winnipeg  
 Tama Millwork, St. Boniface  
 Gissons Custom Woodworks, Winnipeg  
 Washington Cabinet Mfg., Co., Winnipeg  
 Golspie Cabinet, Winnipeg  
 John Isaak Cabinets, St. Paul  
 Klassen Cabinet Makers Ltd., Winnipeg  
 Alfab Building Components Ltd.,  
 North Kildonan  
 Theodore Cabinets Limited, West St. Paul



## APPENDIX J (cont'd)

### SASKATCHEWAN

A. Yunker, Regina  
Shaver's Sash & Door Ltd., Regina  
Pre-Bilt Ltd., Regina  
R.L. Cushing Millwork Co., Ltd., Moose Jaw  
Moose Jaw Sash & Door Co. (1963) Ltd.,  
Moose Jaw  
MacWilliam Construction Co., Ltd.,  
Swift Current  
H. Summers & Son Ltd., Saskatoon  
Bernard Fitzgerald, Saskatoon  
Surfastone Industries Ltd., Shellbrook

### ALBERTA

Willis Wood & Aluminum Ltd., Medicine Hat  
Lethbridge Sash & Door Factory, Lethbridge  
Felsen Construction & Mfg., Ltd., Lethbridge  
Four Star Millwork Co., Ltd., Lethbridge  
North Lethbridge Millwork, Lethbridge  
Superior Millwork, Brooks  
Turin Industries, Town of Taber  
Fica Kitchens, Coalthurst  
Home Builder's Supply, Cardston  
Tanner Building Supplies Ltd., Magrath  
A.B. Cushing Mills Ltd., Calgary  
Allied Woodcraft, Calgary  
Keith Construction Co. Ltd., Calgary  
Forest Lawn Sash & Door, Calgary  
Cunningham Woodcraft, Calgary  
John Erglis (Wood) Co., Ltd., Calgary  
A.R. Bennett Building Supplies & Hardware  
Ltd., Calgary  
Expert Woodcraft Mfg., Ltd., Calgary  
Alberta Door Co., Calgary  
Gurnard Distributors Limited, Calgary  
Superior Components Ltd., Calgary  
Custom Wood Products, Calgary  
Sava Furniture, Calgary  
Modern Millwork & Cabinets Ltd., Calgary  
Alta Sunrise Woodcraft Mfg., Ltd., Calgary  
Medallion Cabinets Ltd., Calgary  
Norda Woodwork & Interiors, Calgary  
Calgary Roof Truss Ltd., Calgary  
Nick & Reno Woodcraft, Calgary

Menzies & Herbert Ltd., Red Deer  
Thomson Cabinets, Red Deer  
Rossander Millwork, Ponoka  
Leighton Sash & Door Co., Delburne  
Fairway Construction Ltd., Lloydminster  
W.H. Clark Lumber Co., Ltd., Edmonton  
Wolfe Reichenbach Wood Products Ltd.,  
South Edmonton  
Futurama Manufacturing Company Ltd.,  
Edmonton  
Abby Millwork & Supplies Co., Ltd.,  
Edmonton  
Eastern Sash & Supply Ltd., South Edmonton  
Builders Supplies Limited, Edmonton  
Zeidler Millwork Corporation, Edmonton  
Superior Sash & Supply Ltd., Edmonton  
Edmonton Millwork Ltd., Edmonton  
Western Archrib Structures Ltd.,  
South Edmonton  
Commercial Woodcrafts (1960) Edmonton  
Style-Rite Cabinets, Edmonton  
Jasper Millwork Ltd., Edmonton  
Southside Woodwork Ltd., Edmonton  
Alberta Truss Ltd., Edmonton  
Rago Woodwork & Supplies Co. Ltd.,  
Edmonton  
Wes-Cliff Woodworkers Co. Ltd., Edmonton  
Delton Cabinet Co., Ltd., Edmonton  
Woodcrest Cabinet Ltd., Edmonton  
Alberta Cabinet Ltd., Edmonton  
Tru-Fit Cabinets Ltd., Edmonton  
A-1 Door Limited, Edmonton  
P.F. Manufacturing, Edmonton  
Ardell Industries Ltd., Edmonton  
Hedco Woodcraft, Edmonton  
Erin Manufacturing Ltd., Edmonton  
Mobile Truss Company Ltd., Edmonton  
Craftwood Industries, Edmonton  
Mastercraft Cabinet Manufacturing Ltd.,  
Edmonton  
Medallion Cabinets Wetaskiwin Ltd.,  
Wetaskiwin  
Magna Woodcraft, Stony Plain  
Westlock Cabinet Makers Limited, Westlock  
F.C. Cundict, Wildwood

## APPENDIX J (cont'd)

### BRITISH COLUMBIA

Alpine Woodcrafts Ltd., Port Alberni  
 Arrowsmith Millwork Ltd., Port Alberni  
 Builders Sash & Door Ltd., Victoria  
 Victoria Cabinet Makers Ltd., Victoria  
 Highland Woodworkers, Victoria  
 Modern Woodworkers, Victoria  
 Ratzka Woodcraft Construction, Victoria  
 Aristocraft Cabinets Ltd., Victoria  
 Island Woodworkers Ltd., Victoria  
 Van Isle Moulding & Millwork Ltd.,  
 Victoria  
 K & K Kitchen Craft, Langley  
 Trubord Industries Ltd., Langley  
 Decor Kitchen Cabinets, Abbotsford  
 Clearbrook Millworks Ltd., Abbotsford  
 Eagle Interiors Ltd., Surrey  
 Valley Kitchen Cabinets, Matsqui  
 Columbia Kitchen Cabinets, Abbotsford  
 Calwood Industries Ltd., Kinnaird  
 Kelowna Millwork Ltd., Kelowna  
 Glenmore Millwork, Kelowna  
 Tru-Trus Fabricators Ltd., Kelowna  
 West Coast Distributors Ltd., Rutland  
 Acutruss Industries Ltd., Vernon  
 Custom Cabinet Construction, Salmon Arm  
 Cowichan Joinery Ltd., Duncan  
 Chilliwack Sash & Door Co., Chilliwack  
 Dargatz Glass Ltd., Chilliwack  
 Pankratz & Glegg Const. Milling Ltd.,  
 Guenther Doors Ltd., Yarrow  
 Trusco Industries Ltd., Prince George  
 Woodland Sash & Door Ltd., Prince George  
 Argus Distributors Ltd., Prince George  
 Acme Pre-Hung Door Co., New Westminster  
 Wesco Lumber Distributors Ltd.,  
 New Westminster  
 Irly Homes Ltd., New Westminster  
 Western Laminated Ltd., New Westminster  
 Hand Woodcrafts Ltd., Port Coquitlam  
 Unique Industries Ltd., Port Coquitlam  
 Phoenix Doors Ltd., Port Coquitlam  
 Window Mfg., Ltd., Port Coquitlam  
 H S C Woodworking Ltd., Coquitlam

North Shore Sash & Door Co., Ltd.,  
 North Vancouver  
 Host Construction Ltd., North Vancouver  
 Westcraft Kitchens Limited, North Vancouver  
 Canwest Industries Ltd., Vancouver  
 Truswood Industries Limited, North Vancouver  
 Kingsway Woodworks Ltd., Vancouver  
 Michael Sash & Door, Vancouver  
 Sigurdson Millwork Co., Ltd., Vancouver  
 Western Sash & Door (1964) Ltd., Vancouver  
 Whitely Sash & Door Co., Ltd., Vancouver  
 British Columbia Door Co., Ltd., Vancouver  
 Pioneer Manufacturing Ltd., Vancouver  
 Fraser Sash & Door Co., Ltd., Vancouver  
 Fleetwood Door (1965) Ltd., Vancouver  
 Progressive Woodworks, Vancouver  
 Accurate Pre-Hung Door Co., Ltd., Vancouver  
 Antonio & Agostino Panichelli, Vancouver  
 Danforce Manufacturing Ltd., Vancouver  
 Balic Woodworking Co., Ltd., Vancouver  
 Starcrest Mfg., Co., Ltd., Vancouver  
 D. Murray Door & Building Products Ltd.,  
 North Vancouver  
 E.L. Sauder Lumber Co., Ltd., Vancouver  
 Sauder Industries Limited, Vancouver  
 Finn Wood Cabinets Ltd., Vancouver  
 S.M. Horner, Vancouver  
 Love Sash & Door (1969) Ltd., Burnaby  
 Flash-Cove Countertops Limited Burnaby  
 Bulkly Valley Forest Industries,  
 South Burnaby  
 Wholesale Millworks Ltd., South Burnaby  
 Nikolai Millwork Industries Ltd.,  
 South Burnaby  
 L.J. Cabinets, Burnaby  
 Central Woodworking Limited, South Burnaby  
 Bench Craft Furniture Mfg., Burnaby  
 Westport Doors Ltd., Burnaby  
 5 Star Manufacturing, South Burnaby  
 Classic Kitchens Ltd., Coquitlam  
 Pacific Pre-Hung Doors Ltd., Coquitlam  
 Glulam Products Ltd., New Westminster  
 Custom Millwork Ltd., North Vancouver  
 Ryvers Woodworks Ltd., Richmond  
 Richmond Sash & Door Ltd., Richmond

## APPENDIX J (cont'd)

### British Columbia (continued)

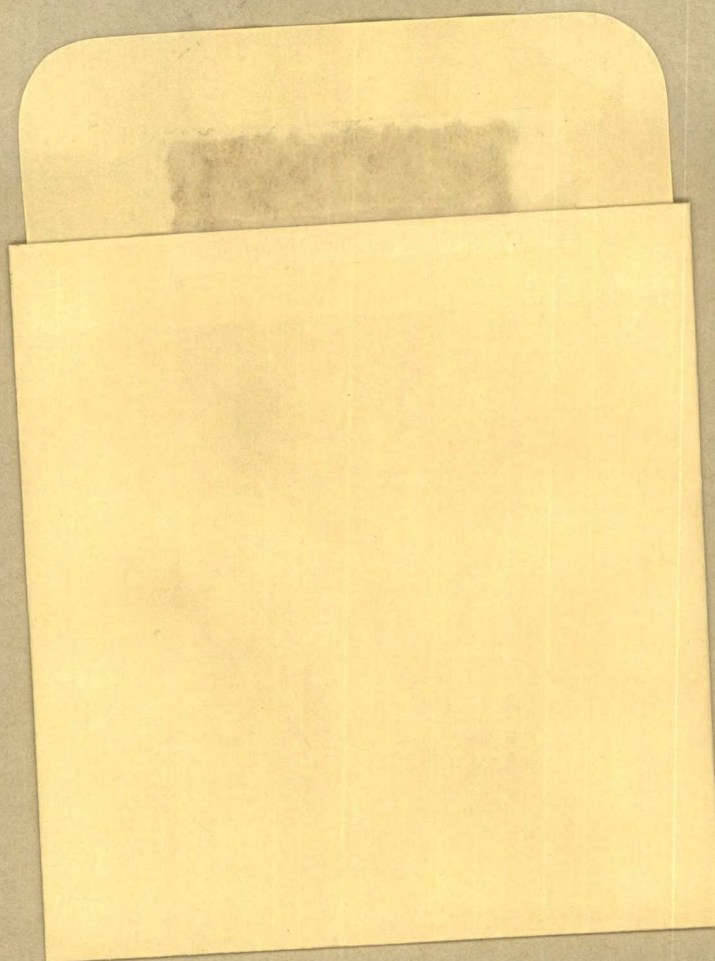
Sauder Doors Limited, Richmond  
Crestwood Kitchens Ltd., Richmond  
Reynolds & Pigeon Holdings Ltd., Richmond  
Citation Cabinets Ltd., Richmond  
Montalco Kitchen Cabinets Ltd., Richmond  
B.W. Robertson, Richmond  
Component Structures Ltd., Richmond  
Modern Kitchen Nooks, Delta  
Stadco Forest Products Ltd., Richmond  
International Cabinet & Fixtures Ltd.,  
Richmond  
Roll's Carpenter Shop, Whalley,  
North Surrey  
Gillis Cabinet Shop, North Surrey  
Mike Roberts Woodworking, Surrey  
Kayline Construction Products Ltd.,  
North Surrey  
Canadian Truss Ltd., Newton  
Stanley Hibbs, Surrey  
Space Insta-Fab Industries Ltd., Vancouver  
Horwood Kitchens Ltd., Surrey  
Surrey Laminated Products Ltd., Surrey  
Evans Woodworking, Surrey  
Northern Sash & Millworks Ltd. Terrace

Karl Monk Sash & Door Ltd., Fruitville  
Dana Cabinets, Ltd., Nanaimo  
Elburn Moulding Ltd., Nanaimo  
Pioneer Sash & Door Co., Ltd., Vernon  
Steiner Arch Rafters & Joists Ltd., Vernon  
Kee Pee Products Ltd., Penticton  
Modern Millwork Limited, Penticton  
Penticton Glass & Millwork Ltd., Penticton  
Okanagan Laminated Beams Ltd., Penticton  
Master Craft Millwork Penticton Ltd.,  
Penticton  
I.D. Carty, Summerland  
Dawson Creek Sash & Door Ltd., Dawson Creek  
Nichols & Walter Ltd., Chetwynd  
Kamex Millwork Ltd., Kamloops  
Monarch Enterprises Co., Ltd., North Kamloops  
I.J. Building Industry Services Ltd., Kamloops  
Nor-Val Industries Ltd., North Kamloops

### YUKON

Winzer General Woodworks Limited,  
Whitehorse





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