

## Canadian Exports to France

### Products of the Farm and Allied Manufactures

#### CEREALS



THE minor part which Canada plays in France's imports of wheat may be clearly seen in the table and chart in the appendix, which shows the sources of imports for consumption in 1913. Other countries not more favorably situated as to crops or transportation facilities far out-distance Canada in French markets. The small importance of Canada in the eyes of large purchasers of wheat in France may be judged by the fact that one of the most important of these maintains in Northern Russia fifty buying agents, in Southern Russia sixty-four, in Argentine Republic thirty-four, in Roumania twenty-eight, in India eighteen, in Australia four. Canada is covered by occasional visits from the one representative who buys in the United States.

Today France is ready and glad to buy wheat from Canada. Unusually large shipments have been made, due principally to the war and to the fact that ocean freight rates from other countries have been increased. These imports have given France an opportunity to see the very fine qualities produced in our country. French purchasers have been satisfied with our wheat, and have come to regard Canadian Government inspection as the best possible guarantee of high grade grain. Dominion-inspected wheat has commanded higher prices than that which has been inspected at sea-board.

In 1914-15 Canada sent 77,331 barrels of wheat flour to France, as against 1,400 barrels in 1913-14, 3 barrels in 1912-13, and 12,568 in 1911-12, indicating quite clearly that France has been well informed as to the quality of Canadian flour. In all the countries visited the Commission heard warm commendation of Canadian flour. This leads to the conclusion that if French millers could be induced to take advantage of the popularity now secured for our grain, and specialize on Canadian wheat and advertise the product in a distinctive way, great gain would result.

With the exception of oats, France's imports from Canada of other grains than wheat are relatively small. In oats Canada has an opportunity, as the quality of oats received from other countries has not been good. French buyers are ceasing to buy as once many of them did—

irrespective of the weight per bushel. Canada's fine qualities of oats should have a good reception, as weight for weight they have greater food value than other oats.

Any situation or condition of which advantage can be taken to establish confidence in the high standard of our grain, in the reliability of Government inspection, in the fairness and in the honesty of our dealers and in the efficiency of our methods of transportation will tend to insure for us a permanent and growing market in France.

### VEGETABLES AND FRUITS

Canada can hardly expect to place many of these goods in the French market, as the intensive cultivation of that country usually provides a large crop, which gives a surplus that goes to Great Britain. Some cities, Bordeaux and others, have canning factories which render competition difficult. The French tariff is high. This, with the Atlantic freight, creates an almost impossible barrier against our goods. Nevertheless the French Year Book of 1913 shows that imports of Canned Beans and Tomatoes were 57,000 metric quintals, of which 38,000 were from Algeria, 16,000 from Spain. France imports some green apples and Canada might well try to place both evaporated and green in the market. In 1913 France imported from Germany, Spain, Italy, Belgium, Austria, etc., about 80,000 metric quintals or say 110,000 barrels apples and pears. Canada did not send any.

### CANNED MEATS

The remarks on page 28 under the head "United Kingdom" as to the quality of Canadian Canned Meat apply likewise to France. Unless Canadian packers are most careful about quality they cannot expect France to become a steady customer. The war has created an opportunity for Canadian canners, but the goods must be bright and clean. The French returns show that in 1913 France imported 42,341 metric quintals of tinned meats. Great Britain sent 6,159 m. q., French colonies 29,000 m. q. Canada is not mentioned as sending any.

The Canadian Trade Returns for the year 1915 show that we sold France—Canned Meats:—

1914.....	103,791 lbs.....	value \$29,170
1915.....	3,204,594 ".....	" 633,903

A value of about 20 cts. per lb.

This large export in 1915 is due to the war demand.

## Products of the Forest and Allied Manufactures

### TIMBER



FRANCE consumes, every year, an enormous quantity of all classes of lumber products that Canada can furnish. In 1912 French imports in sawn timber and lumber, from countries subject to the same customs tariff as Canada were valued at 200,000,000 francs; in 1913 the amount was even greater. After the war, this demand will increase prodigiously on account of the necessity of building temporary shelters and of re-building destroyed property. It must be remembered that France has retaken from the enemy 753 towns (communes) containing 16,669 houses that must be completely reconstructed and 29,584 that need repairs; it must also be borne in mind that there are now 247 towns on the firing line and 2,554 towns at present occupied by the enemy (July 1916).

In considering the question whether Canada can successfully compete for this trade, it is important to note that she has one incontestable advantage over the United States in enjoying the minimum tariff on manufactured wood, while they pay general tariff. The present supplies are received mostly from United States, Russia, Scandinavia, Switzerland and some through England, but none of these countries have any preference over Canada in custom duties.

At the present time, in spite of the exorbitant increase in freight rates, there is a large and varied demand, as is proven by the unsolicited offers received during the short stay of the Commission in France.

HAVRE.—An agent would like to purchase, as soon as possible, a couple of ship-loads (steam or sailing vessels) of our spruce and pine of medium and ordinary qualities. He asks Canadian shippers to make an offer in any system of measurement. His specifications for widths and lengths were made in metric measure, but he had taken the trouble to compute them in feet and inches.

BORDEAUX.—Two importers, having large yards and sheds, asked for staves regardless of price. They furthermore offer to receive, free of charge, quantities of our woods to be used as samples to further the trade. They estimate that the ports of Havre, Nantes, La Rochelle and Bordeaux import annually more than 250,000,000 feet board measure of lumber.

In ordinary times the freight from Riga costs 30 francs per 1,000 ft., whereas from Nova Scotia the average is 50 francs. The port of Bordeaux

handles large quantities of timber for mine props. This class of timber comes from the forests of Landes, France, and is a resinous maritime pine, lifeless and unfit for any other use. It brings 23 francs per ton and England buys all that can be supplied.

MARSEILLES.—A merchant wishes to buy an assorted stock of 10,000 cubic metres. Another agent purchases annually 35,000 cubic metres.

MONTBELIARD (DOUBS). A buyer who has been purchasing in Antwerp for twenty years, needs mouldings, wood for aeroplanes, soft wood flooring, also oak and other hardwood floorings, panelling, etc. Another manufacturer needs wood for shuttles.

BELFORT.—The largest manufacturing concern of the region is desirous of obtaining a supply of basswood (bois blanc) for textile machines. The specifications are not strict as to lengths, provided there be some pieces 6 metres long by 30 centimetres wide, 15 to 80 millimetres thick. In Switzerland they procured what they required at 70 francs the cubic metre, but the tree was measured whole, then cut up, the heart laid aside, the purchaser bearing the loss. This company buys, in lots of 1500 cubic metres, all kinds of dry, light wood, weighing about 700 kilos the cubic metre, straight grain, capable of firmly holding screws, cut with square edges, without wane. This company is willing to pay the highest prices.

LYONS, TOULOUSE, MILLAU.—Here as well as in above mentioned cities, the Commission was approached by firms anxious to handle Canadian lumber, pulpwood, railway ties, telegraph poles, wood for packing cases, etc. Birch, maple and ash are also in great demand.

WOODENWARE.—There is a very general demand for small woodenware such as dress hangers, towel rollers, washboards, shuttles, etc. However, low prices governing the market and high tariff duties prevent Canada from taking advantage of this trade for the present.

TIES OR SLEEPERS.—An unlimited and continuous demand exists. Our Douglas Fir is extremely abundant and in our opinion well suited for this use; samples have been sent to some of the railway companies in France. A test was made by these companies and the result thereof was embodied in two reports from their chief engineers on the 23rd of May and June 8th, 1916. (These reports are now in the hands of the Commissioner General in Paris). Although these reports are favourable as to the durable qualities of the wood, they are unfavourable as to its capacity for the retention of spikes. This objection, and the experiments upon which it is based, do not seem to justify the disqualification of our lumber for such purposes, especially when its primary quality, that of durability, is conceded to be excellent. To extract a spike from a sleeper immediately after it has been driven cannot conclusively show the grasp-

ing and retentive power of the timber. But even admitting that it does, then why not overcome the difficulty by using special spikes entailing no greater cost? The great point gained by sending the sample is that both the railways have agreed to try the sleepers in actual use where it is expected they will show their real value.

It is evident that France cannot supply her own requirements. The policy adopted throughout France for the conservation of her forests, to cultivate them and to cut only as much as can be produced each year, necessitates the purchase elsewhere of the wood she needs for building purposes, etc. A change in this policy would bring about a revolution in France, where whole districts (communes) pay their taxes from the annual revenue from their forests, and in some cases even distribute a considerable surplus among the inhabitants.

Before the beginning of hostilities the lumber merchants of Canada were satisfied with the profits to be derived from the local market and exportation to England. The trade was carried on without effort and with happy results. Necessity had not forced them to seek new markets which they did not need in order to completely dispose of the limited quantity produced. Thus we have, in the first place, the absence of necessity and lack of interest on the part of the Canadian merchants. Furthermore, the conditions under which lumber is sold on the French market are totally different from those existing in Canada. The metric system of measurement is no more understood here in the Dominion than is the Petrograd standard of measure. It must even be admitted that the value of the franc is little known. The same is the case with the weight of wood in kilos. We are not in the habit of furnishing samples. It is a trouble to obtain information as to freight and insurance. Such are the obstacles that the carefree prosperity of our lumber merchants has made no effort to overcome.

In contrast to this apathy we find the constant and ingenious activity of our competitors. The timber merchants of the United States, trained and equipped by a close study of commercial methods, do not hesitate to cross the sea with their samples, in order to make known the value of their products, and, as a result, they make large sales.

The English agents who have always made a specialty of exportation and transportation of all kinds of goods, are willing to make special terms for freight, to sell, using the system of measurements the most convenient for the customer and to compute their prices in francs or in shillings, as the case may be.

The Germans, who carry on their commerce in a scientific manner, provide themselves with handbooks, in which may instantly be found the price of lumber per thousand feet, be it computed per standard or per

cubic metre—in dollars, in pounds sterling, in francs, or marks, etc. In these handbooks may also be found the weight of the various species of wood in order to facilitate estimating the cost of freight. Finally, we there find the average rates of exchange. Armed with this guide, the salesman, who needs only to learn the names of the species and the qualities most in demand, passes often for an expert and impresses the French consumer.

Very little Canadian wood is sold on the French market because it is almost unknown, and, what is worse, in the few places where it is known it has the reputation of being of very inferior quality. This seems hard to believe, but it is only the strict truth. It can be explained by the fact that the Canadian lumber exported has been sent almost exclusively to Great Britain and when, from time to time, it was sent from that country to France, it lost its name and passed as the product of other countries. This was the case with our fine woods that brought high prices. It must be admitted, however, that certain shipments of Canadian wood of a most inferior quality were unloaded on the French market at low prices because they could not be disposed of elsewhere. Such proceedings have caused incalculable harm to the reputation of our products. Unfortunately, our exports of high quality lumber have not been able to counteract this undesirable reputation, since they have always been credited to other countries. At Contras, near Bordeaux, the following sign is displayed on a large lumber factory: "BOIS DE L'AMERIQUE DU NORD" (NORTH AMERICAN WOOD). It is evident that in France, Canada does not exist as a separate country, only "American" products are known. The French word "épinette" has even been forgotten, and this wood is currently known in France by the name of "Spruce." If Canadian Pine from the Province of Quebec or Ontario is offered, the objection will be raised that it is too resinous. Nevertheless, everyone knows the great difference between Canadian pine which has lost its resin by being "floated," and the French pine which is cultivated expressly for its resinous products.

Everywhere in America and in England, the pine of the Provinces of Quebec and Ontario is known as without equal in the world. In France there is little interest in its qualities. British Columbia Fir, thanks to the extensive propaganda by the Government of that Province, is beginning to be appreciated in certain places, but it has a formidable competitor in the Pitch Pine of the United States. With the freight charges in existence even before the war, it was impossible for Canadian woods to compete with the products of European countries. When it is considered that in normal times the cost of transportation constitutes over 40% of the selling price of wood in the French market, it will be seen

that the freight rates are one of the most essential factors of this business.

The cost of transportation, revealed by the above proportion, does not seem at all justifiable, especially if it be compared with the cost of transportation of lumber coming from the ports of the Baltic Sea. In the latter case the freight rates are only half as much as for lumber coming from the ports of Montreal and Quebec.

The lack of direct steamship communication is another obstacle and one of the most serious. Our exportation has been carried on almost exclusively through England. On the English market our British Columbia wood is robbed of its national character. It is lost in the midst of the products of other countries and is sent to France under names that in no way indicate its origin. At times even dealers sell it as wood from "the North." Our forest products have an undeniable value, and it is essential that their value be known in France and attributed to Canada, in order that our merchants and the country at large may reap the benefit.

In order to secure a place in the French market, Canadian producers must first of all make Canadian products known. To attain this end, there is but one practical and efficacious way, namely, to show them to possible purchasers. Printed matter, advertisements and lectures by commercial agents will never convince the French people of the value of our merchandise. They must see it, feel it and be convinced for themselves.

Again, our merchants must come into personal contact with the French market in order to thoroughly understand its needs and even its smallest requirements, if they wish to compete with other countries. In this connection it will be well to remark that Canadian lumber should be more carefully sawn and also more in accordance with the dimensions required by the French market. Merchants of the Dominion should also realise the importance of providing their salesmen with all the information necessary in order to reply to the questions of the French consumer, such as the weight of the wood per cubic metre, per standard, etc.

## PULP

France depends largely on the outside world for Pulp, owing to the absence of sufficient natural resources. A very limited area of woodlands consists chiefly of Pine, fit only for an inferior grade of pulp, because of its resinous properties. Manufacturing processes are expensive, depending largely on coal for power, and this double burden makes it essential that imports of materials be made on a basis of strict economy.

The chief item in the ultimate cost of pulp being the expense of transportation, France finds it particularly necessary to look for a source of supply from which freights are lowest. It has, therefore, fallen to Scandinavia to furnish the French mills with the bulk of their pulp and, with the exception of Germany and Austria in the case of chemical pulp, imports from other countries have been practically negligible.

The total imports for 1913 amounted to 285,932 tons (net) of mechanical pulp, and 226,568 tons of chemical pulp. Scandinavia furnished in that year 90% of mechanical and 58% of chemical, Germany's and Austria's share in the latter amounting to 34%.

If Canada is to share in this trade, there are obstacles to be overcome. The difficulty in carrying 50% moist mechanical pulp for the long distance, at an advantageous rate, is apparent. It would be necessary to ship chemical pulp practically dry, and in competition with several other countries favoured by a comparatively short haul.

Previous to the war, a fair average price for groundwood was 11 francs per 100 kilos c.i.f. Rouen, equalling about \$19.40 per 2,000 lbs. Duty applying to Canada amounted to \$1.76 per ton for dry pulp and \$0.88 for moist.

Chemical Pulp was bought at 19 to 20 francs per 100 kilos c.i.f. Rouen, or about \$35.26 per 2000 lbs.—Duty \$3.50 per ton.

It should be particularly borne in mind that pre-war conditions need not by any means indicate what will exist in the future. Nevertheless, as there is no other basis on which to work, the above figures are given for what they may be worth.

At the present moment (July, 1916), the market has advanced to exceptional figures, much beyond normal. The demand is strong and the tariff has been temporarily reduced by 95%, whilst current prices are three times the normal and tending to rise further.

No doubt in the future the quantities amounting to 76,350 tons formerly obtained from Germany and Austria will be sought for elsewhere. It would seem obvious, however, that Canada cannot hope to look to France for a sound and regular pulp market unless the burden of the cost of transportation is in some way neutralized.

## PAPER

France gives liberal encouragement to her manufacturers through customs tariff protection. Paper is one of the commodities which has been produced under these circumstances, and is therefore imported to a much less extent, relatively, than the raw material, pulp, for which the country has small resources of timber.



From an inspection of the paper mills at Nanterre-sur-Seine, which the Commission was privileged to make, and at Lancey (Isère), the members judged that France is in a position to sell Canada grades of paper which are quite remarkable, and unequalled in Canada in delicacy of manufacture, and at the same time that the French newsprint industry is working under a very serious handicap in having to import both sulphite pulp and mechanical pulp as well as certain other supplies, and to fabricate the paper with steam power generated from imported coal.

Canada, on the other hand, with her wealth of wood and water powers, should be able to make some attractive offers to France, if, under the stress of war conditions, the French newsprint industry is not in a position to satisfy all demands upon it.

The fact that Canada ships some newsprint to Great Britain under normal circumstances lends encouragement to this idea.

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## Products of the Sea and Allied Manufactures

### FISH



ACK of ocean transportation facilities has doubtless caused a decrease in Canada's exports of fish to France. There have been in the past few years some fluctuations which demand attention. The decrease in our fresh salmon sales to France since 1911 has been considerable. During 1914 our sales of canned lobsters to the United Kingdom increased slightly. Fresh salmon exports from Canada to the United Kingdom increased 60% over 1913 exports, and those of canned salmon were more than double what they were in 1911, 1912 and 1913. This proves that the United Kingdom importers were getting the trade that Canada was losing in France.

**COD FISH.**—As shown by trade returns, Canada does not sell any cod fish to France. The supply of this fish comes almost entirely from the French fishing fleet, one-third of which seeks the shores of Iceland, and the other two-thirds the Newfoundland and St. Pierre shores.

**BONELESS FISH.**—Eastern Canada has, during the last twenty years, developed an industry in boneless codfish for which we might find a market in France. This commodity is packed in small wooden boxes.

Canadian fish dealers, in order to secure the French trade, should pack this boned codfish, and other boned fish, in small wooden boxes of 1 kilo (equal to 2.20 lbs.) 3 kilos, and 5 kilos.

The Commission found that dealers in France apparently know nothing about these clean white boned codfish.

**SKINLESS CODFISH.**—These are packed in wooden cases of 100 lbs. net. The fish are well cured by the usual pickle curing, and sun-dried afterwards. The coarse, dark skin is removed from the napes and the fish look bright and clean, lying flat in the wide boxes. If these fish were cured a little more dry, and shipped by quick steamers, they should find a market in France from October to April.

**HADDOCK, HAKE, POLLOCK.**—If seeking a market for these fish in France, Canadian packers should not try to sell them as "Codfish," but as a second quality fish. They should be boned and put up in boxes of one kilo, three kilos and five kilos. On all sizes of boxes the word "Canada" should be prominent. The boxes must not be marked

“Codfish” but “Pure Fish.” The weight and packer’s name should be carefully stated. Samples should be sent first to responsible agents in the larger cities.

**SKATE, FLOUNDERS.**—These fish are to be found for sale in French markets and are often served in the higher class restaurants, etc.

**PICKLED HERRING.**—The market for Canadian Pickled Herring in France is not likely to be large. France does not buy this fish to any great extent, and further, large quantities are obtainable in the English Channel and the North Sea. It might be, however, that if Canadian dealers would pack good Eastern Number 1 Herring in sound barrels, bound with iron hoops, and would forward samples to French agents, a market might be developed. One of the difficulties so far has been that the Canadian barrels and half-barrels made from spruce wood have not been proof against leakage.

Kippered Herring in tins might also be sold.

**SMOKED FISH.**—We doubt if fish that are smoked in the ordinary way could stand the summer weather of France, but for shipment in the months of November and December it is possible that smoked fish, kippers, bloaters, etc., and even smoked salmon, might find a sale in the French market.

**SMOKED HERRING.**—Eastern Canada has been putting up for many years large quantities of small herring in thin board boxes. These fish count from 20 to 25 to the box, and weigh net about one kilo—2.20 lbs. They are dried hard, and in ordinary climates will keep for three to six months. We would suggest that dealers place these on the French market. October or November would be a good time for shipment. The small boxes of one kilo might sell; the larger ones of 10 kilos would be difficult of sale. They should be smoked fairly dry and hard, so as to require very little cooking. Boxes should be stamped “Canada”; the letters “Canada” about one inch long. It is best to have the packer’s name on each box.

**SALMON, LOBSTERS.**—France has always bought enormous quantities of canned lobsters, and while canned salmon are sold only in very limited quantities, the sale has greatly developed of late, the article having found favor in the taste of the consuming public, since meats and other commodities have become so dear.

Lobsters sell mainly in flats  $\frac{1}{4}$ ,  $\frac{1}{2}$ ,  $\frac{3}{4}$  and 1 lb. tins. Before the war a good market was found for lobsters in Russia, Belgium and Germany, which countries bought mainly the choicest grades. The better grades come from the south shore of Nova Scotia and also from Newfoundland, but lobsters of Newfoundland origin do not interest the French market.

That colony has no special treaty with France, therefore the lobsters of Newfoundland origin pay the maximum duty while Canadian fish enter at the minimum duty.

It is claimed that these south shore Nova Scotia lobsters are a little larger than those coming from Prince Edward Island, and the New Brunswick coast on the Gulf of St. Lawrence. The tin plate should be of the best quality and well coated, so as to prevent its being tarnished by sulphate of iron, or so called "smut" which sometimes develops within the can.

Agents in France state that all cases of lobsters and salmon must be marked in four-inch letters "Canada." Each can of tinned fish must also be stamped "Canada" on the cover of each tin, letters to be not less than 7 millimetres (or  $\frac{1}{4}$  inch) long. This stamping of "Canada" on tins is required for fish only and not for lobsters, the latter being considered as "Crustaceæ" to which the stamping law does not apply.

Cases are sometimes broken. It is advisable to have them bound with iron stripping rather than nails. Some dealers use a machine which draws the iron stripping carefully over the box, setting it down into the wood. This makes a perfect box and prevents pilfering and breaking.

Dealers complain that sometimes certain lines of lobsters contain too much liquid. Lobsters should be packed, whole tail at bottom of tin, whole claws on the top, and some of the small meat in the centre.

The duty on Canadian lobster and salmon is 25 francs per 100 kilos, if the goods come direct to France. If they come to France via an English or other European port, the duty is 28.60 francs per 100 kilos. In 1915 and 1916 large quantities of salmon and lobster were shipped via New York to France. The Government, owing to the suspension of direct steamship services between the Dominion and the French ports, does not charge the duty at the rate of Frs. 28.60 via New York, as the law is construed to apply only to a second European port. But the shipment via New York being contrary to the provisions of the French tariff law regarding direct imports and minimum tariff, a special permit has to be obtained by the French importer for each individual consignment. In shipping via New York, dealers have to supply, besides the usual certificate of Canadian origin, legalised and viséd by the French Consul at the point of shipment in Canada, a special certificate made out at New York, attesting that the goods, as set out with full particulars as to marks, quantities, name of steamers, etc., have been transhipped at New York "in transit" under Customs' supervision and without having sustained any other handling at New York. This declaration has to be legalised by the French Consul

at New York. The certificates must also indicate the name of the shipper, and of the buyer or consignee in France.

Cases of 48 1 lb. tins of salmon or lobsters weigh about 32 kilos gross, or 28 kilos net, including weight of tins.

The paper lining of tins of lobsters is most essential. It should be good, pure, vegetable parchment paper, so as to prevent acid from affecting the tins.

Except in two towns in France, there is an "octroi" duty in each city. This "octroi" on fish in Paris is nearly as much as the original duty of 25 francs per 100 kilos. As all these duties are specific and not "ad valorem" the tendency is for buyers in France to take the best goods and not the poor stock, as the duty is the same on each.

The dealers in Paris who sell out to the small stores make many losses by "swells" and by "black meat." A wholesaler in France has to guarantee the quality of his canned goods, sometimes from July to September, when he receives them, until the following February or March. The importance, therefore, of having the goods put up in the best way possible as to paper lining, quality, strength and condition of boxes, etc., is obvious.

All dealers prefer buying c. i. f. Havre or Bordeaux. Of the five kinds of salmon, not many of the high grade "Sockeye" have been used since the war, as the original cost is too high. "Cohoes" and "Pinks" are the largest sellers. Just now, on account of the war, the "Pinks" are selling well. It is thought that when peace is arranged, a large demand will spring up for "Cohoes." Dealers report that Canadian salmon are usually good stock. The half and one lb. "Pinks" sell the best. There is considerable demand for "Cohoes" in ordinary years. A Paris dealer bought in July, 1916, 10,000 cases "Pinks" and 5,000 cases of "Cohoes" for autumn delivery.

Canadian dealers must remember that there are no salmon at all canned in France, and with ordinary care and consideration for French needs, trade should rapidly increase.

The French trade prefers a firm salmon; any that are at all soft tend to lower Canada's reputation among the dealers in canned goods.

**SARDINES, SPRATS.**—Sardines are, of course, canned in France, but best quality only, while large quantities of sardines of medium and cheap grades come from Spain and Portugal. Sprats come from Norway, the latter being slightly smoked and going by the name of "Brislings."

If the Canadian canners desire to offer true sardines, they should print on the label the words: "Sardines, Poissons à l'Huile." If the

fish are not true sardines, but some other kind of fish, then they should be marked simply "Poissons à l'Huile"; omitting the word "Sardines." Otherwise, the goods will be stopped by the Customs authorities and heavy fines may be imposed on the importers for fraudulent trade description. All canned sardines, sprats or fish in oil must be stamped in the lids or bottoms of cans in at least 4 millimeter characters: "Importé du Canada."

The "key" sardine tin is much liked in France, especially that kind of which key rolls up the top or cover of the box and leaves the fish completely exposed. The key needs to be laid in a groove on the tin, and then it will come in with the weight and not pay a special duty.

**SMOKED SALMON.**—There is a special high grade, sliced, which sells at a good price in  $\frac{1}{4}$  and  $\frac{1}{2}$  lb. tins. These must be put up in first class olive oil. They are also sold in small tinplate drums that will hold about 3 kilos (6  $\frac{3}{5}$  lbs.). It is perhaps not advisable to make consignments of smoked salmon, but it would be worth while to send samples to responsible agents. Shippers of canned goods should be careful to familiarise themselves with the French laws concerning duties, stamping tins, certificates of origin, etc., before putting their goods on the French market. For this purpose we append extracts from the law:—

"Stamping Regulations of Canned Goods. The Act July 11th, 1906, prescribes that all foreign canned sardines, vegetables and plums coming into France, should bear the name of their country of origin stamped or embossed on the cover or bottom of the tin in letters of at least 4 m/m long."

A bill in amendment of above was adopted by the Chamber of Deputies and the Senate on May 13th, 1913. This amendment makes applicable to all foreign canned fish coming into France, the stipulations of the Act of July, 1906. During the discussion, it was pointed out that canned molluscs or crustaceans (such as oysters, lobsters, langoustes and crabs) would not be subject to the terms of the Act, as they were not fish and were classified differently in the French Customs Tariff —(See French Tariff, items 48, 49 and 50).

At the request of the Dominion Government, Canadian canned salmon was exempted from the application of the Act until June 29th, 1914. Canned lobsters and other crustaceans have never come under the operation of the Act.

## FRENCH TARIFF ON FISH

SECTION —		General per 100 kilos.	Minimum per 100 kilos.
No.	—Fresh Salmon Trout.....	40 fcs.	25 fcs.
45	—Pike, Carp, Eel.....	12 fcs.	8 fcs.
No.	—Dried Cod.....	60 fcs.	48 fcs.
46	—Salted or Smoked Herring.	20 fcs.	15 fcs.
No.	—Canned, Pickled or other-		
47	— wise prepared.....	50 fcs.	25 fcs.
No.	—Lobsters, fresh.....	40 fcs.	15 fcs.
49	—Lobsters.....	40 fcs.	25 fcs.

Canada has the benefit of the minimum tariff. The Commission recommends that the French Government be asked to make the duty on canned lobsters the same as that on fresh lobsters.

## Products of the Mine and Allied Manufactures

### METALS AND MINERALS.



S in Great Britain, the Commission found there were many enquiries for Canadian Metals and Minerals, and every desire was manifested to obtain what might be required by France and what Canada could ship.

**ASBESTOS.**—The Commission discovered that this had been obtained chiefly from Germany, and there were many enquiries from France for the article in its various forms. Many of the enquiries were directed towards the manufactured products.

It is still an open question whether it will not pay Canada better to ship asbestos as "fibre" or in the crude state, rather than manufacture in Canada, owing to the high cost of labor. In any case there is a big demand in France for this particular mineral. There should be without question a large outlet in France for it in all its forms.

**ANTIMONY.**—There were enquiries for this article. Now that Canada is able to produce a product which is free from the objectionable features which have hitherto created a prejudice against Canadian antimony, provided prices and terms are satisfactory there is a large demand for the article.

**MAGNESIUM METAL.**—Enquiries were also made for this metal, but they were limited, due no doubt to the fact that it is not yet well known that Canada is a producer of magnesium metal of very superior quality.

The Commission made the fact as well known as they could that Canada is now manufacturing this article.

Probably if the fact were judiciously advertised in France, through the proper channels, a much larger trade could be secured.

**MOLYBDENITE, VANADIUM, IRON TITANIUM ORES.**—Enquiries were also made for these, but the supply being so limited at present, the Commission can simply report that there is a demand for these in France if they are available.

**ZINC (SPELTER), LEAD (PIG) refined, ready for rolling: COPPER INGOTS.**—French importers are ready to receive offers of these three metals as soon as Canada is in a position to offer them.



**PIG IRON.**—There were enquiries for this article, and an importer claimed that he had written to Canadian producers without receiving any reply.

**HIGH SPEED STEEL.**—There were enquiries for this, with an indication that if price and quality were right, there was a very large field in France for Canadian products.

**CORUNDUM.**—As in Great Britain, the Commission met with a demand for this. There are indications that for the right material there is a good opening in France for corundum and other abrasive products.

**MAGNESITE.**—It did not seem to be recognised that Canada was a very good source for this material. Large supplies are obtained from Greece, Hungary, India, and as the Canadian product is of a particularly high grade, it is well worth the attention of the producers to study the French market, as the Commissioners believe that it will prove to be a profitable undertaking.

**CHROME ORE.**—There is a demand for this in France, and if the Canadian producers can offer the right grade, there should be no trouble in disposing of large quantities.

**MICA.**—There is also a demand for this in France, particularly for electrical purposes.

The Commission also received enquiries for mica sheets in layers, the medium for binding being shellac. The firm enquiring said the prices in Canada they found were twice as high as those of the English, Swiss or German makers, but they believed that Canada could produce as good an article, and at competitive prices, if the trade were better understood.

**TUNGSTEN.**—There is a large outlet in France for this. The Commission at many points were asked for this article, all of a character which indicated that large quantities could be sold, if available.

**COBALT.**—Enquiries were made for metal and for "tailings." Owing to recent researches in connection with this article demonstrating its utility as an electroplating material and as a valuable alloy in steel, there is likely to be a much bigger demand.

**NICKEL.**—The Commission was asked if it were possible to obtain this article direct from Canadian manufacturers. The buyers stated that the article was apparently in the hands of a trust, and if they wanted supplies they had to pay heavily for the relatively small quantity they required. One leading engineer suggested that in all probability the difficulty would be overcome by the adoption of a system of co-operative buying by the small users, thus securing the best possible terms. If it

were possible to supply the metal direct from Canada, it would appear that a much larger trade directly benefiting the Dominion might be obtained.

## CHEMICALS

*(Manufactured from various natural resources)*

The Commission found that, as in Britain, the chemical factories were devoting their attention specifically to the manufacture of munitions. Fine chemicals even for medicinal use were only being manufactured in such quantities as would meet the requirements of the public and particularly of the Army, and all were under the control of the Government. Very large extensions had been made to plants existing before the war, with a view of increasing the output of chemicals required in the manufacture of explosives. Apparently the situation in this respect was ample for the needs of the French nation.

The Commission was informed that after the war there would be a very considerable development in the production of aniline dyes and of synthetic coal tar products. Steps were being taken to organize various factories on a basis which would prevent overlapping.

France possesses many important industrial districts devoted to chemicals, particularly various points on the banks of the Rhone, where the cheap water transit enables the manufacturers to handle their products with a minimum of transportation charges.

Canada possesses considerable interest to the chemical manufacturers of France, for the simple reason that the Dominion can produce a large number of chemicals obtained from the distillation of wood. Among these may be mentioned Acetone, for which enquiries were made, and as soon as Canada is in a position to offer this article, provided prices and transportation are favourable, a good trade will result.

ACETIC ACID will also be in demand when supplies are available for export, and there will be a demand for the glacial 99%.

The Commission received many enquiries for Formaldehyde, especially in Bordeaux, and there is a demand in other centres of France as well.

For Wood Alcohol there were also many enquiries, and given favorable conditions, there is no doubt that this Canadian product will find a good outlet in France.

BRONZE POWDERS.—The Commission found that there were enquiries for these of all grades, and it is possible that Canada may find herself a very large shipper of bronze powders as a result of the growing demand, and the fact that practically the only producing country in the past was Germany.

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## Other Manufactures

### KNIT GOODS AND TEXTILES

The class of textiles and knit goods manufactured in Canada will scarcely meet the requirements of the French taste, and against the French tariff it would be difficult to compete.

However, as stated in the section of the report dealing with the situation in Great Britain, present day conditions should not determine the question of export trade. Our manufacturers must look ahead, and no market should be classed as impossible without having had a trial.

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## French Exports to Canada

As has been emphasized in the introductory remarks on France, our Ally is the home of artistic production, and the goods which we have been accustomed to receive from her in the past, and which should form the basis of increased trade in the future, are those which cater to the refined and aesthetic side of our national life. Even the war, and the terrible inroads which it has made upon the industrial life of the country, through invasion, conversion of factories, and worst of all, upon the lives of the people, have not by any means stopped the manufacture of the beautiful things for which France is renowned.

In its travels, the Commission saw many factories and work centres. It cannot hope to do justice to all which it saw, but commends to its countrymen, among others, the commodities mentioned below.

### WINES

Canada's imports of wine from France far exceed those of any other French commodity. France is the vineyard of the world, particularly in the finer grades of wine, and providing that war does not make economies more necessary than heretofore, French wine imports should continue. In any event Bordeaux, Rheims, Lyons, Marseilles, Grand Chartreux and other wine centres will continue to be the points from which the Canadian dinner table and banquet hall will be chiefly supplied.

### TAPESTRIES

At Paris, Aubusson, Felletin, Lyons and other centres visited, the Commission saw the work of wonderfully skilled weavers of tapestries

which hold a reputation in the world almost akin to that of the master painters. It is not necessary to more than remind the Canadian public of the beautiful creations and reproductions of old tapestries which are available in France.

## PORCELAIN

When in Limoges, the Commission had the opportunity of seeing the wonderful porcelain industries which are established in that city. From the extent of the factories, the diligence of the workpeople, and the wonderful artistic qualities displayed in the products, there is little doubt in the minds of the Commission that the porcelain industry of France will always hold a prominent position in the world.

Nowhere are the wonderful artistic qualities of the French people seen to better advantage than in these beautiful porcelain creations. In the wonderful Museum of Potteries, which the Commission had the privilege of visiting while in Limoges, are to be seen samples of potteries which have existed since the beginning of the industry in France, as well as many examples of the old Babylonian, Greek and Roman wares.

The exports of porcelain from France in 1913 amounted to 22,221,035 francs. This includes only the white and decorated china, exclusively products of France.

The porcelain industry is one of the leading manufactures in the whole country, and one which Canadians can patronize to advantage, not only in the assurance of having an article of wonderful superiority and highest art, but also in assisting and developing an industry which must be maintained now in place of intense competition from the enemy countries.

## CUT GLASS

France still commands a high place in the fabrication of Cut Glass. In Paris and neighborhood some of the most charming specimens of cut glass were still being made; she is likely to long maintain her lead in this respect.

The Commission was impressed with the great possibilities of extending Canadian imports from France in those lines of goods in which the French people stand pre-eminent, and in which Canada is as yet lacking.

As has been stated in the introduction, the articles which Canada may import are chiefly of a fine and costly nature or are peculiar to France among the nations of the world.

### PERFORATED METALS

Some firms in France have specialized in this direction and they offer an enormous variety of perforated designs, to be used as grilles, sieves, etc. The centre of this particular business is in Lyons, and the products turned out are of fine quality.

The French manufacturers are able to offer snap-fastenings for gloves, dresses, etc. The output at the present time is limited owing to part of the manufacturing plant being taken for use in the making of munitions.

### WATCHES

The Commission was pleased and surprised to find the extent to which France could provide cheap watches in competition with the German and American types. At Haut-Rhin Français they found remarkably well equipped factories turning out an enormous number of watches to suit the largest of all markets; the prices being attractive to all buyers. At Besançon particularly the Commission found the finer grade of art watches, and at an exhibition held in the town hall of Besançon they had an opportunity of seeing some of the most exquisite examples of the watchmaker's and the jeweller's art combined. At Montbéliard also they found extensive industries paying special attention to the manufacture of recording instruments of all kinds, including watches, taximeters and speed-indicators.

### GLOVES

France is particularly well equipped for the production of gloves, which seem to be principally made in the neighborhood of Grenoble. The French manufacturers are not only making gloves now of the various forms of kid but they are also producing successfully the textile gloves which have heretofore been so largely a product of Germany.

At the present time the glove makers seem to be full of orders in France, but undoubtedly Canada can look with assurance to our Ally for the supply of these goods, especially of the better qualities.

### SMOKING PIPES

The manufacture of these is practically confined to the St. Claude district in the Jura. The quality of the products is surprisingly good while the quantity turned out daily appears wonderful to those unfamiliar with the demands for briar pipes. The Commissioners found that a

good trade was being done in briar pipes with Canada at the present time and the manufacturers were looking forward to an extensive trade after the war, although they confessed that they expected a much larger trade among their own returned soldiers who had learned from the British the practice of pipe smoking in the trenches.

### "ARTICLES DE PARIS"

No other title so clearly expresses one phase of French world trade as the above. La Rue de la Paix, La Place Vendôme and La Place de l'Opéra at once symbolize and largely provide the beautiful articles of personal and household adornment known throughout the world. Other countries await the touch of French genius which dictates fashions and supplies beautiful materials with which to carry them out. The textile, jewellery and furnishing industries from all parts of France contribute to the magnitude and high standard of this industry.

### THERMAL ESTABLISHMENTS

The Commission found in France that great importance was attached to the appreciation of the French hydropathic establishments, and the Commissioners were given opportunities of inspecting the principal thermal establishments during their tour, and can bear testimony to the excellent system under which they are run. In all cases they are under the direction of fully qualified and distinguished doctors who are in their particular branch specialists for the diseases which may be treated.

Our French friends desire to point out the advantage of replacing the German and Austrian thermal establishments by the French institutions for curative treatment, and claim with a large measure of reason that they are able to provide in France any form of treatment which may be desired.

It is well to note that all the thermal establishments of France are situated in the most beautiful spots of the Savoy, Jura, Auvergne, Dauphiny, the centre of France, etc., and these points are easily reached from Paris, by the Paris, Lyons and Mediterranean and Paris Orleans Railway System. These railways have made arrangements for a series of delightful automobile drives through some of the most exquisite scenery of France. The Commission has much pleasure in commending the French hydropathic treatment of disease to the attention of their fellow Canadians.

It is to be noted that in nearly every case the thermal stations of France are of great antiquity, most of the baths having been elaborated and made much use of by the Romans, who have in many cases left

interesting monuments behind of the appreciation in which they held the bathing establishments that are now catering to modern civilization.

It must be understood that the list given in the appendix does not exhaust the offers of relief and cure to the invalid and of interesting travel to the tourist, they simply happen to be those which were more particularly brought under the notice of the Commission in its travels.

### THE LYONS FAIR

It is the opinion of those Canadians who visited the "Foire d'Echantillons" (Samples Fair) at Lyons in March, 1916, that this Fair offers an excellent medium by which Canadians who are seeking French market can get into touch with prospective customers. The Fair was organized late in 1915 which the aim of displacing, so far as the Allies and Neutrals are concerned, the Leipzig Fair which since the 16th century has played an important part in the commercial machinery of Europe. Credit for its organization is due principally to Senator Herriot, Mayor of Lyons, who received every assistance from the business men of his city. Although very little time was thereby allowed for organization, it was decided to hold the Fair at the same time as had been found best at Leipzig, viz., 1st to 15th March.

The exhibits, of which there were about one thousand, were housed in portable wooden houses attractively located on the quays of the Rhone on both sides of the river. These houses were about thirteen feet square and an exhibitor could take one or more. Exhibits, as far as possible, were grouped so as to bring together all those comprising the same or similar lines of goods. The advantage of stands of this kind as compared with the open booths, usually used, is that they are more private, and less of the exhibitor's time is taken up with the idly curious. To all intents and purposes he has a shop of his own where he can talk business with a customer and which he can lock up when he so desires.

In spite of the short time at their disposal a few Canadian firms represented in London decided to exhibit at Lyons and stands were taken by the Canadian Pacific Railway, Export Association of Canada, Limited, Dominion Bridge Company, Limited, and Dominion Rubber Company, Limited. They all report themselves highly satisfied and recommend participation in the Fair to anyone who desires to do business in France or in other European continental countries. Buyers were present at Lyons from Great Britain, France, Switzerland, Italy, Spain, Morocco, Norway and other countries, and the Fair was successful beyond the most optimistic dreams of its organizers.

The advantages to exhibitors suggested by those having experience are:

(1) The exhibitor is enabled to meet buyers from all over France and from neighboring countries without having to undergo great traveling expenses and without waste of time.

(2) An excellent opportunity is offered of getting in a short time an insight into the business methods of the people whom the exhibitor meets and he is also enabled to get information about the goods offered by his competitors.

(3) The exhibitor is placed in the favorable position of having the buyer "come to him" instead of having to approach the buyer.

It is intended to hold the Fair annually during the first fortnight in March and those intending to exhibit next year should lose no time in making their arrangements. They should also keep in mind the following:—A representative must be sent who can speak French. He should have an exhibit—which should be as attractive as possible—of samples of goods which are expected to be sold in the French market, and he must know those goods and be able to quote firm prices—in French money, for them delivered in a French port. (This may be modified somewhat by war conditions). It must be remembered that the Fair is not merely an exhibition, nor on the other hand are goods sold over the counter; it is a place where the seller and buyer meet and where orders are taken for future delivery.

From all that the Commission can learn it believes that the Lyons Fair will be a permanent institution and that it will be well worth while for Canadians to avail themselves of its advantages. Those interested should write to the Secretary at Lyons, France, or to the Canadian Commissioner-General at Paris, for further information.

## THE BORDEAUX FAIR

With the idea that the industries and commerce of France will be greatly developed by two fairs a year, instead of one, and believing that the southwest of France has interests which are distinct in many ways from those of central and eastern France, the citizens of Bordeaux have organized the Bordeaux Fair, which was held for the first time from the 5th to the 20th September, 1916.

This fair continues a tradition which reaches far into the past. The Fair of olden times was somewhat local, whereas the Fair of to-day is expected to develop and strengthen relations between all France, on the one hand, and her Colonies and the United States, South America, Canada and Central America, on the other hand.



The Syndicate which has charge of the Fair has the patronage of some of the most important officials in France, and includes in its members many of the most prominent manufacturers, financiers and publicity men of Bordeaux and the Southwest, as well as Senators and Deputies.

Complete arrangements were made for the housing of samples in the Place de Quinconces, in the centre of Bordeaux, a beautiful public place admirably situated for the purpose.

While it was not possible for the Commission to be present at the time of the Fair, the reports of the great success of the event which have since reached them, together with the very clear impression of the abilities and zeal of the men of affairs whom they had the privilege of meeting in Bordeaux, convinces them that the Foire de Bordeaux will indeed become an important annual event. Undoubtedly the relations which Canada may hope to have with France in the future, will run to no small extent through the channels which this institution has created.

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# ITALY

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## Introductory



TALY possesses an area of 114,410 square miles. In the past twenty-five years her industrial progress has been quite remarkable. Despite the enormous drain of emigration the population has increased from twenty-eight millions to nearly forty millions today. Since 1881 Italy has been transformed from a purely agricultural into a distinctly industrial nation. In the northern provinces are to be found great and flourishing manufacturing industries of almost every class. While the country is without coal deposits, the Italians have turned their attention successfully to the development of hydro-electric power along the Alpine frontier, in the Appennines and elsewhere, and the employment of "white coal" for industrial purposes, lighting, traction and domestic use, is now very extensive.

Central Italy has improved and raised its wine and oil production to an important position in Europe. Southern Italy and Sicily have contributed their quota to the general national progress, and stand pre-eminent for their crops of citrous fruits, their mineral resources, with sulphur as the chief product. In examining the potentialities of the Italian market for the extension of Canada's trade exchange the economic value of Italy's geographical position is a factor of outstanding significance. One realises at the outset that Italy is only a part—although the most important part—of the larger market of the Mediterranean. Centrally situated on the Mediterranean, Italy's economic requirements are uniform with those of her neighbours in the East and West.

Italy's coast line is dotted with excellent and well equipped ports which facilitate trade to an unusual degree.

It is a fact that in the past the staple products of Canada, such as lumber, dried codfish, wheat, etc., have been able to compete successfully in the markets of the Western Mediterranean as and when shipping facilities have been available.

The economic advantages possessed by Genoa for Italy and Central Europe compare favorably with other ports of the Mediterranean. Milan and its surrounding district is most densely populated; it is at once a hive of industry and a great distributing centre. It is naturally dependent upon Genoa for its important import and export trade. The port of Leghorn for Tuscany and Central Italy grows steadily in importance as a channel for imports. Naples, the largest of Italian cities, with a population nearing one million, has developed enormously of late years. The creation of a free zone for manufacturing purposes adjoining the port, has led to the concentration there of many industries, and to the building up of an increasingly important censuming centre for a great variety of raw materials and food products. Finally, Palermo, Messina and Catania occupy positions of strategic-commercial importance not only for the trade of Sicily but as ports of call for shipping from all parts of the world with the East, the Eastern Levant and the Black Sea.

Italy's foreign trade exchange in 1913—the last normal year—were with the following five principal countries:

	Imports	Exports
Germany . . . . .	\$118,204,000	\$65,299,000
United Kingdom. . . . .	116,010,000	50,394,000
United States. . . . .	97,584,000	50,000,000
France . . . . .	54,208,000	44,000,000
Austria Hungary . . . . .	51,000,000	42,000,000

Italy bought twice as much from the United Kingdom and Germany as she sold to those countries. Great Britain's chief export to Italy was coal: 8,000,000 tons as against 1,000,000 tons from Germany. The absolute predominance acquired by Germany in the Italian market in manufactured products is very clear. It furnishes the measure of the opportunity that exists for the allied countries. Of the imports from Austria-Hungary two-fifths represented partially and fully manufactured articles. Of the United States imports (some seventy-five million dollars) represented such characteristic products as raw cotton, tobacco, copper, cotton, seed oil, coal oil and pitch pine lumber.

### OPPORTUNITIES FOR EXPORTING TO ITALY

Trade relations between Canada and Italy are of comparatively recent date. While there have been small exports from Canada to Italy since Confederation, and while imports from Italy have always attained some importance, the total volume of trade between the two countries

in 1913 was approximately only 25,000,000 lire \*(less than \$5,000,000.00). This, while small, indicates that there is a possibility of trade, for less than ten years ago, in 1906, the Italian export to Canada amounted to only 277,000 lire, and the Canadian exports to Italy were only a little more than one-and-a-half million lire. Since 1906, therefore, the exports from Canada to Italy have increased ten times, and Italian exports to Canada are now thirty times those of 1906.

This is an excellent showing, and it is fair to expect that the future commercial relations between the two countries would be large even without the bonds which the war has thrown around the two countries. Further, there are more than 40,000 Italian immigrants in Canada who constitute an important influence in the commercial relations between the two countries.

The importing capacity of Italy is indicated by the table given below, based upon imports and prices immediately prior to the outbreak of war.

	about	400	Million	Lire
Grain.....	"	400	"	"
Coal and Coke.....	"	250	"	"
Raw Cotton.....	"	160	"	"
Machinery.....	"	150	"	"
Wood.....	"	50	"	"
Raw Silk.....	"	30	"	"
Cast Iron.....	"	90	"	"
Wool.....	"	50	"	"
Coffee.....	"	70	"	"
Instruments.....	"	130	"	"
Hides.....	"	20	"	"
Oats.....	"	25	"	"
Horses.....	"	50	"	"
Silk Goods.....	"	40	"	"
Salt Fish.....	"	15	"	"
Fish in Oil.....	"	50	"	"
Cocoons.....	"	60	"	"
Woollen Goods.....	"	25	"	"
Ships.....	"	130	"	"
Iron and Steel.....	"	40	"	"
Tobacco.....	"	50	"	"
Oil Seeds.....	"	60	"	"
Copper, Metals, etc.....	"	20	"	"
Petroleum.....				

\*Lira = 19.3 cents

In the last two years preceding the war, the Italian imports from Canada were as follows (Italian Government figures):—

	1912	1913
	In thousands of lire.	
Wood.....	932	11
Wood Pulp.....	115	115
Agricultural Machinery.....	247	133
Other machinery.....	33	15
Asbestos.....	1,734	1,279
Hard Wheat.....	898	923
Soft Wheat.....	198	1,204
Cod Fish and Stock Fish.....	9,317	10,695

As will be noted, wheat, asbestos and cod fish form the largest imports. It should be observed, however, that the cod fish comes principally from Newfoundland, and the accurate figures of Canadian importations are not easily obtainable. The Canadian export figures in the same commodities according to the Canadian Government trades statistics are as follows:—Wheat, 1913, \$274,667.00; Asbestos, 1912, \$4,358.00, 1913, \$7,430.00; Cod Fish, 1912, \$173,621.00, 1913, \$200,069.00.

The many hundreds of enquiries which have been received from Italy since the outbreak of the war indicate the diversity of the requirements of the country, and point to the conclusion that a great number of the articles in demand are of a character which Canadians are perfectly able to supply, if the industries concerned are organized to that end. Italians are anxious to, and must necessarily, revise their sources of supply in the future—hence the encouragement for Canadians to investigate the market, and get into touch with its needs and methods of business.

The climatic conditions in Italy make it easy for most of the population to live comfortably with fewer of what are considered the necessities and comforts in the northern latitudes. Canadian exporters will have to bear this in mind as it will indicate that many commodities ordinarily in use in Canada, Great Britain and France will not appeal to the Italian purchaser. The goods required are of a less expensive quality—a point on which the Germans seized with great zeal. The Canadian manufacturer who wishes to export to Italy must face the demand for long credits, although even in this respect much exaggeration has occurred. Careful selling so as to relieve the Italian merchant from the necessity of buying in large quantities is most desirable.

The Commission was informed on the very highest authority that Italy will not be able to maintain after the conclusion of peace, the modes of payment, and, generally speaking, the customs in trade introduced during the European War. International competition will sooner or later make payments at three months or more from date of shipment again customary.

The Italians fully expect Germany to make tremendous efforts to overcome her present disability, and the recommendation is strongly made by Italian men of affairs that Canadians organize their trade in such a way as to concede a liberal degree of credit to the Italian firms with whom they will initiate relations.

### ITALY AND GERMANY

During the past twenty-five years a vast amount of German capital has been poured into Italy with the object of exploiting her natural resources. The result has been the development of a large number of industries and the adoption of German methods in very many factories. In the industrial centre of the country, Milan, prior to the outbreak of the war, there were 10,000 Germans who were engaged in various occupations, particularly in those industries which centre around the development of electrical power. This factor threatened to imperil the initiative of the Italians in this direction, especially as Germany in a large measure absorbed the electric power companies in the *Electricitäts Gesellschaft*.

In order to maintain her commercial supremacy, Germany made special provision through her export freight rates to command the Italian market. As an indication, it was stated that the export freight rates from Germany to Italy on certain agricultural implements was one-tenth of the rates imposed when the same goods were sent from Italy to Germany. This example will sufficiently demonstrate the measures which Germany was willing to take in order to secure Italian trade, and at the same time to discourage the Italian native industry.

### METHODS OF DOING BUSINESS IN ITALY

The Banca d'Italia is Italy's Bank of England. It has rendered great service in the development of the country, particularly as it has been entrusted with the confidence of the Italian Government, and is represented on some of the Government Committees, such as the National Institute of Co-operative Credit.

So far as Canadians are concerned, as British subjects they will take a great interest in the *Credito Italiano*, which has now formed, in conjunction with British interests, an organization which is of the highest importance in relation between the two countries. This institution, known as the "British-Italian Corporation, Limited," with a capital of \$5,000,000, which has already been subscribed, chiefly by banks, has for its object the fostering of trade between Italy and the United Kingdom. The British Government will contribute an annual subscription of \$250,000 a year for the first ten years of working, which will be repayable, without interest, out of all profits above 5 per cent. per annum on the subscribed capital. An Italian company, with a capital of \$2,000,000, is to be formed to work in conjunction with the British-Italian Corporation, half of its capital being subscribed by the corporation and half by the *Credito Italiano* and its friends.

The creation of this financial corporation is to meet the demand which has been for a long time expressed, for some system of assistance to British exporters to incur the quite legitimate risks of export trade which are a little beyond those ordinarily accepted under the solid and conservative policy of British banks. This careful policy has been the foundation of the British financial system which has made Britain's credit paramount throughout the world. The new banking project above mentioned will be administered in a spirit at once cautious and liberal, and will confer great and solid benefits on British trade without taking any speculative or illegitimate risks.

It is of interest to Canadians that one of Canada's largest banks is taking an interest to the extent of \$50,000 in the British Italian-Corporation Limited.

In Italy the Commission found the keenest interest in financial relations with Canada. A desire was strongly expressed that dealings in this respect between Italy and the Dominion should be direct and not through another medium as at present, in order that any loss in exchange or restriction of movement of money should be entirely obviated.

The opinion was expressed that Canadian banks might, with advantage, consider the question of entering into arrangements whereby the banking between the two countries might be facilitated.

At one conference (Milan) upon the question of finance, a prominent financier expressed his strong desire that there should be practical co-operation between the two countries in order that the two peoples might know each other better. To this end he suggested that twenty young Italian commercial students should be sent to Canada for a period of, say, two years, in order that they might study the Canadian market and

the methods of doing business in the Dominion. In return, Italy would be glad to receive a corresponding number of young Canadians who are entering commercial life, who would be given ample opportunity of studying Italian conditions, methods and requirements. This gentleman expressed his willingness to take into his offices ten such young men, who would be given every opportunity of becoming fully acquainted with Italy's needs in the direction of commerce.

### ITALY IN THE WAR

Enough has been said of the changes wrought by Italy since her entry into the war to indicate the spirit of the people, and their strong desire for independence of German control. Italy's neutrality proved for a time very damaging to the country, as industrial confidence was destroyed. Once war was declared on Austria the situation underwent an entire change, and the national industries, which for years had suffered from the Austro-German dumping system, began to work again with great intensity.

The steel industries took on new life, and in a short space of time considerably improved their output both in quantity and quality. The future of the Italian steel industry is most promising owing to the hydro-electric development now contemplated.

Electrical appliances, cotton goods, silk and woollen fabrics, were produced in astonishing quantities soon after the declaration of war.

In 1915, one hundred and sixty-three new industrial companies with a total capital of 102.6 million lire were established, and ninety-eight limited liability companies increased their capital by 94 millions of lire.

With her large investments in Germany, and with so many industries in the hands of German capitalists, Italy has been brave in asserting her independence of the Central Power. Now that the breach has come, it is evident that trade between Italy and the other nations of the Entente must be developed upon a permanent basis.

This, in conjunction with the fact that Italy's products are such as will form a return cargo in tramp steamers to Canada, makes it distinctly desirable that all efforts should be bent towards a further interchange of commodities.

When the transportation problem is solved there should be little difficulty in making profitable interchange along the lines which the following report will indicate.



# Canadian Exports to Italy

## Products of the Farm and Allied Manufactures

### WHEAT



TALY requires annually for the support of her population and her manufactures, imported wheat to the extent of 1,000,000 to 1,500,000 tons. The harvest of 1913 was a record one, hence the imports for the succeeding year were abnormally light. The wheat imports for 1912-13 and 1913-14 were as follows:—

	SOFT	HARD
1912-13 . . . . .	1,320,847 tons . . . . .	807,213 tons
1913-14 . . . . .	690,500 " . . . . .	698,000 "

The imports by countries in 1913 of wheat will be found in the Appendix.

United States hard wheat, especially of the "durum" variety, for the manufacture of macaroni, is now shipped regularly to Italy. There is hardly a port in the country which does not receive large consignments of wheat. In normal times the bulk came from the Black Sea, and is of Russian and Roumanian origin. The "Tagansrag" variety of Russian wheat is in favor with the macaroni factories on account of its high percentage of gluten. During the course of the war Italy has been dependent upon the United States and Canada for her wheat requirements.

While there is some difference of opinion as to the relative merits of Russian and Canadian wheat for the manufacture of macaroni, the largest manufacturer of "pastas" in Italy told the Commission that the Canadian wheat was the best obtainable. Friendly Russian competition may be expected, but Canada has every possibility of a splendid Italian development. Canadian wheat is greatly assisted by the high reputation of Canadian Government inspection. This inspection is a large factor in securing the best prices.

The grade No. 1 Northern as established by Dominion officials is greatly favoured in the Milan districts for the manufacture of "pastas." The Commission was advised that it would be best to make definite arrangements for direct dealing between Canada and Italy to avoid mixing of the grain, as is sometimes practised by the dealers at seaboard.

At present the duty on flour is double the duty on wheat. As one hundred kilos of wheat yields sixty kilos of flour, the balance is thrown in favor of the importation of wheat.

#### CANNED VEGETABLES, FRUIT AND MILK

Up to 1916 Canada was not able to sell Italy canned goods of any description.

The Commission is of opinion that a vigorous campaign for promoting the sale of Salmon would bring good results, as the Italian Government is disposed to reduce the tariff on this article, so that it may become a popular food. We doubt, however, if we can ever hope to place many canned vegetables or fruits in Italy. They have such a rotation of, and so many, crops, so much fruit, and Swiss milk and cream are so near, that Canada could not hope to compete.

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## Products of the Forest and Allied Manufactures

### LUMBER



IN 1913 Italy imported 13,748,000 tons of Lumber valued at \$27,500,000, two-thirds of which came from Austria-Hungary. The full details of the imports in 1913 will be found in chart form in the appendix. The United States contributed \$3,500,000 in pitch pine and oak staves. Canada occasionally sends cargoes of deals into the Western Mediterranean, but no regular trade has been established so far. The large box shook trade for the export of Sicilian lemons and for the tomato and pasta factories, which was originally supplied from the United States, should offer possibilities in the future for our lumber interests in the Maritime Provinces. But the Italian lumber market will require to be considered in conjunction with that of Spain and the French possessions in Northern Africa, where the opportunities in the future for Canadian lumber generally will be large.

Italy has thirty-seven shipbuilding establishments and the introduction of Douglas fir is said to be feasible.

Prior to the war, pitch pine came into Italy from Austria at \$18.00 to \$20.00 per thousand feet, board measure. It would therefore appear that Canada cannot easily compete, but the market is one which it would pay well to study.

Owing to the war there is a great demand for railroad ties, telegraph poles and planking. High freights and the comparative lack of return freights form the general drawbacks. Return freights are to be found in a measure in corkwood, mineral ores from Sardinia, and salt.

It may be added that Italians understand with difficulty North American technical trade expressions. Quotations for running feet are unintelligible to them. On the other hand cubic feet can easily be converted into cubic metres. It is always advisable to conform to the specifications in regard to minor details, thus railroad and telegraph poles are demanded bored, drilled, chamfered, or turned in a certain manner. This work, it is said, would not be profitable to undertake, and contracts therefore should be secured excluding such details.

ASH.—There was also a demand for this wood. It was formerly obtained from Austria and Switzerland. It can be supplied with advantage by Canada. Ash is largely used in Italy for wheels. One

manufacturer of carriages and aeroplanes asked for a sample lot of ash in the rough, as he would like to import this from Canada, if possible.

SPRUCE.—While in Italy the Commission had the privilege of meeting some of the largest of the manufacturers of aeroplanes. As this industry is to exist not only during the war, but also for commercial purposes afterwards, it is evident that there will be a demand for the class of wood which Canada can supply and which will enter into the manufacture of these machines. To date no wood has been found to be more satisfactory than Sitka spruce, which grows upon the shores of the North Pacific in British Columbia. The wood has wonderful properties of lightness and strength, and is admirably suited to the construction of aeroplanes. Undoubtedly after the war there will be a permanent trade in this timber. In the meantime, some use can be made of the spruce of the Eastern Provinces, such as grows in Quebec, New Brunswick and Nova Scotia. Although excellent for lumber purposes, this wood does not possess the peculiar qualities of the Sitka spruce, but is to some extent utilisable in the making of aeroplanes.

### PULP

The Pulp situation in Italy was summed up by a prominent pulp consumer in Milan as follows:—

Italy produces per annum 5000 tons of mechanical pulp and imports 10,000 tons. She produces no cellulose but imports 80,000 tons per annum. She produces 300,000 tons of paper of all kinds and exports from 50,000 to 100,000 tons per annum to various countries, chiefly South America, Australia, Japan and the West Indies. The requirements of bleached sulphite pulp are about 30,000 tons per annum. The prices at which chemical pulp has been imported have been as follows:—

Bleached	.....	\$52.60	per short ton	f.o.b.
Easy bleaching	.....	42.20	“ “ “ “	“ “
News quality	.....	35.00	“ “ “ “	“ “
Mechanical pulp	.....	21.00	“ “ “	free on the frontier.

The paper maker who gave this information stated that after the war the prices c.i.f. per short ton of pulp will probably be about as follows:—

Bleached	.....	\$88.00 to \$105.00
Unbleached	.....	52.50 “ 62.50
Mechanical	.....	23.00 “ 25.00

These are all air-dry quotations.

The Italian consumers laid emphasis upon the requirements of bleached sulphite, and upon the fact that this quality stands an ocean freight rate better than the cheaper pulp.

The short distance to Austria makes it simple for Italian manufacturers to secure their pulp at low rates. While some Italian manufacturers state most definitely that they intend to sever completely their trade relations with Germany and Austria, the competition from these sources must still be expected. Also there will be the Norwegian and Swedish competition. While at the prices given above and in the face of present day freight rates the business may not look inviting to Canadian manufacturers, the state of affairs which may be brought in by fiscal arrangements after the war should be carefully watched in order that any opening to trade with Italy may not be overlooked.

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## Products of the Sea and Allied Manufactures

### FISH



ODFISH constitutes the bulk of Italy's fish imports of about seven million dollars per annum. Norway is the principal source of supply, furnishing over one-third of the total. Canada sends somewhat more than one-quarter. Denmark, Great Britain, France and the United States make up the balance.

Canada has an excellent chance to compete with Norway, since while the shortness of the ocean haul is in Norway's favour, the transatlantic cod keeps six or eight months, whereas the Norwegian cod is said to deteriorate rapidly. Again, while it may be that a part of the imports of cod credited to Canada originate in Newfoundland, the Italian market does not favour the dark Newfoundland pack, but prefers the Copenhagen style, which is much like Eastern Canadian pickle-cured medium cod, i.e., pickle-cured, then pressed and dried slightly.

The dealers in Northern Italy are accustomed to buy haddock and cod, soft-cured, in bundles of 100 kilos, wrapped in sacking and firmly corded. The fish are 14-16 inches long. The southern market, as represented by Naples, prefers the stiff, board-like curing.

Canada's exports of fish to Italy may be developed to include other varieties than cod. Britain brings in many cargoes of Western Hemisphere fish, which are at once shipped out to Italy. Britain sent Italy in 1913 some 5,000 tons of dried herring, valued at nearly \$2,300,000.

Given direct steamship communication with Italian ports, such as Naples or Genoa, Canada's exports should rapidly increase. This would be the case particularly if other Mediterranean ports are visited. Spain and Portugal both import considerable quantities of codfish, the former bringing in, in 1913, 54,000 tons.

## Products of the Mine and Allied Manufactures

### METALS AND MINERALS



THE Commission received enquiries for the following: Antimony, Copper, Zinc (Spelter), Iron and Steel.

It is worth noting that Italy, notwithstanding the extent of her territory, does not possess any coal mines or deposits of iron ore. She therefore has to import both, and there is a large demand for fine steel in ingots and also in tubes and sheets. One large shipbuilder is prepared to treat for large quantities of steel suitable for shipbuilding.

**MAGNESIUM METAL.**—There is a demand for this, and it is worthy of note that since the visit of the Commission, small initial sales have been made of this metal. Larger orders are sure to follow.

**ASBESTOS.**—Next to wheat and fish, asbestos figures more prominently in Canadian exports to Italy than any other commodity. The lines of trade communication are well established, and need little encouragement. This mineral is an outstanding example of a natural resource which has found its way into the greatest markets of the world.

**MICA.**—A demand for this was made, and as Italy is a large producer of electrical apparatus, there should be a good market for the right quality.

**CORUNDUM, CARBORUNDUM.**—The Commission received enquiries for this from Italian importers, the demands agreeing with those in Great Britain and France.

**MAGNESITE.**—There was a demand for this mineral in Italy as in France and Great Britain.

**COBALT AND NICKEL.**—Enquiries were received for these articles in Italy. There is a prospect of good trade to be done in both.

Notwithstanding the limited time at the disposal of the Commission while in Italy, it was manifest that Canada has a very large opening in the Italian market for all its metal and mineral products.

### CHEMICALS

*(Manufactured from various natural resources)*

As in Great Britain and France, the Commission found that the chemical factories were almost entirely engaged in the production of explosives. As in the other Allied countries, provision was being made for after the war conditions, so as to adapt the chemical factories and their extensions to the production of industrial chemicals.

Italy produces large quantities of Cream of Tartar and Tartaric Acid, a large quantity during recent years having found its way into foreign markets through Germany.

Italy also produces large quantities of Citric Acid, for the manufacture of which it possesses exceptional natural advantages.

The Commission found that Quinine, which used to be a feature of the Italian chemical trade, is again to be manufactured in that country, after a suspension of many years. The quality of Italian Quinine was of a very high grade, and Canada may naturally look to the Italian manufacturers for a great deal of her supplies in the future.

The Commission also found that the Italian chemists are even now producing many synthetic preparations hitherto made in Germany, such as Acid Acetal-Salicylic, Phenacetin, Pyramidol, Veronal, Hydro-Quinone, Metol, etc.

The demand for Canadian chemicals, such as Acetone, Formaldehyde, Wood Alcohol, and products of that type, does not appear to be very strong in Italy at the present time, but there is no doubt that when the fact becomes known that Canada can offer these products to advantage, a trade of considerable dimensions can be developed.

Italy, thanks to her great wealth of water power, is already manufacturing many electrolytic chemicals, such as Carbide of Calcium, and the tendency will be for the list to be expanded as further water powers are brought under control.

## Other Manufactures

### AGRICULTURAL IMPLEMENTS

The use of agricultural implements in Italy has rapidly extended in recent years. They now meet with ready acceptance. The importance of the trade in agricultural implements is shown by the following figures of imports:—

1904	1909	1913
\$1,233,000	\$3,795,500	\$3,795,500

The use of modern ploughs, especially of the Brabant type, has become quite general. The Germans made particularly strong efforts to capture this trade, and according to information given to the Commission, were able to quote very low prices by reason of the fact that they used the "scrap" from shipbuilding yards to make plough shares. This metal was an inferior quality of steel but good enough to make a plough that looked well. Further, the Germans had the advantage of very favorable export freight rates to adjoining countries.



United States manufacturers have been in the market to a certain extent with the Oliver plough.

### ENAMELLED WARE, STOVES

The exclusion of the imports from Austria which amounted to 2,000 tons in 1913 valued at \$750,000 and of 1,000 tons worth (400,000) from Germany, opens up a field for the Canadian article, if the necessary transportation conditions can be met. The popular demand is for the cheap grey enamelled ware. Stoves of the American type, a German imitation of an American self-feeding cylindrical stove, have been imported and sell freely in Leghorn and Central Italy. Germany has also been successful in providing the central heating plant for apartment buildings. There should be an opening for Canadian makers of central heating systems in Italy.

### TEXTILES AND KNIT GOODS

The remarks made concerning Great Britain and France apply equally to Italy.

Cotton textiles are manufactured in Italy, particularly coarse yarn goods, exceptionally well, and Italian taste is so different from Canadian that unusual difficulties present themselves. This industry is in such strong hands in Canada that it might not be unreasonable to suggest that an expert representative with a full range of samples be sent to France and Italy with a view to testing these markets thoroughly, and if an enterprising wholesale merchant in each country could be induced to stock such lines as look at all promising and provision be made for the prompt filling of his repeat orders, this would appear to be the best means of making the attempt.

Cotton blankets, especially in the better grades, are well made in Italy, and little or no opportunity is offered in this line.

Canada is expanding, our products are improving. Our manufacturers are not lacking in enterprise. The world upheaval has created an opportunity. Export markets should be tested both in textiles and knit goods as soon as our manufacturers are in a position to take on new business.

## Italian Exports to Canada

Reference to the Appendix (152) will show the extent to which Canada has imported various commodities from Italy. The following may be mentioned particularly:—

**PASTAS.** Macaroni. Italian pastas are already very favorably received in Canada, and while this industry is developing in the Dominion to an extent where local production can take care of the demand, the good quality of the Italian pastas is almost certain to secure recognition. This is particularly true in connection with the fact, as noted elsewhere, that Canadian wheat is very much in demand in Italy for the manufacture of this class of foodstuff.

**WINE.** Marsella and Vermouth. There is bound to be a demand for these commodities in Canada, on account of the good quality of the Italian products. Probably also the peculiar vintages of fine wines and sparkling wines will also be in demand.

**ACID FRUITS AND OILS.** For these two highly important Italian products, the Canadian market offers possibilities of a large sale. The Italian producers feel that if Canada will accord to the Italian acid fruits and oils favorable treatment in regard to tariffs, the imports into Canada of this class of commodity could be considerably developed. This might apply also to essential oils.

**HATS.** The Italian exports of hats to Canada in 1907 was barely 2,000 lire; in 1909 they amounted to 57,000 lire; in 1910, 285,000 lire; 1911, 575,000 lire; 1912, 747,000 lire; 1913, 904,000 lire. This record speaks for itself. Italian hats are very popular in Canada and are being distributed by the largest and best houses. Straw as well as felt hats share the favor of the Canadian consumer.

**SULPHUR.** While the sale of this mineral to Canada has lately fallen off owing to the large supply from Louisiana, the establishment of direct steamship lines might facilitate shipments from Italy to Canada. Sulphur makes an excellent ballast cargo.

**SOAP.** There has been a demand for the Italian soap of the Marseilles type since its first appearance in Canada. It is doubtless possible to expand this trade with mutual satisfaction to both countries.

**SILK THREAD AND FABRIC.** The cheapness and durability of the Italian product are likely to combine to make the increase in exports to Canada greater in the future.

**TOMATO SAUCE.** This is one of the largest imports of Canada from Italy (436,000 lire in 1913). At the present time it would seem desirable

to have this commodity imported as freely as possible, until the methods of production in Canada are suitable to a more economic production.

As has already been noted, Italy is enjoying a remarkable expansion industrially. Under these conditions Canada may look forward to much larger trade than ever before.

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## Belgium

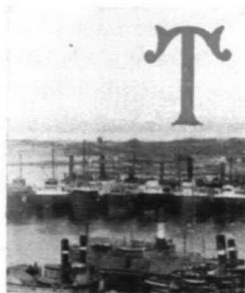
The Commission had the honour of interviewing the Belgian Government on two occasions, once in Paris and once at Havre. At these conferences the needs of the Belgium to be re-constituted were discussed, and the following articles were specified as those which would be most needed by that country:

Building Lumber of all kinds,  
Mine Timber,  
Wheat and Barley,  
Live Cattle for fattening,  
Cattle Feed: Oil Cake,  
Meats frozen and canned,  
Movable Wooden Houses.

The Minister of Finance, Monsieur Van der Vyere, stated that the question of finance was such an important one that he hesitated to speak of the needs of Belgium, but the Commission ventured to assure him that when she had need of materials for re-constructing her homes, her factories, her railways, and renewing her activities, that they need have no fear as to the financial side of the question, as they might be sure of the sympathetic co-operation of the Allied Powers toward that end.



## Transportation



HE Commission was at every point confronted by the problem of Ocean Transportation. Prior to the war regular lines were running between Great Britain and Canadian ports, viz: the Allan, C. P. R., White Star, Dominion, Canadian Northern, Donaldson, Cunard, Manchester, La Compagnie Générale Transatlantique, La Navigazione Generale Italiana. Between France and Canada the only British line operating at the outbreak of hostilities, was the Allan line between Montreal and Havre.

La Compagnie Générale Transatlantique established a line in 1912 between Montreal and Havre, and only ceased at the outbreak of hostilities. Communication between Italy and Canada was established by the Navigazione Generale Italiana, which company ran a regular steamship line Genoa-Canada. However, as soon as war was declared this line was suspended. The C. P. R. also had a line running between Canada and Trieste, but naturally this service was immediately suspended on the declaration of war.

In taking a general view of the transportation between Canada and the Allied nations, it would appear that the established lines have not given that service in linking up Canada with other countries which might have been expected. It has been felt for some years that the rates of freight have been of such a character as to seriously impair their usefulness as a means of developing Canadian trade. Canada's ocean transportation will have to be completely reorganized if the Dominion is to derive the fullest benefit from her natural resources and manufactured products. The question is one of such serious importance to the Dominion that the Commission feels that it calls for prompt and scientific treatment by the Government. It was suggested to the Commission that greater use might be made of tramp steamers, but this class of vessel requires a cargo outward as well as home, and if encouraged to come to Canada, a steamer of this class is heavily penalized in the matter of insurance, particularly if the voyage is by the St. Lawrence route. As the tramp steamer forms by far the larger proportion of ocean cargo tonnage, it would appear that Imperial control centralized, say in London, might so adjust the employment of ships that the different needs of the Empire might be met as the requirements of the crop or season might demand.\* If such a mobilization of Imperial transportation facilities could be achieved, it would lead to an adjustment of freight carrying which would

\*Mr. Pauzé dissenting

insure adequate return to the steamers and at the same time bring about a reduction of freight rates which would enormously assist transportation between Canada, the ports of Great Britain and the Allied Nations.

In the opinion of the Commission the question is too important to be left to the decision of private corporations, as the future of Canada in respect to overseas trade will depend almost entirely upon the securing of favorable service and freight rates. It is to be remembered that a great number of Canada's competitors are geographically in a much better position owing to their nearness to the markets of Great Britain and the Allies, and it will be necessary to overcome this drawback if Canada is to have an important share of European trade now so freely offered to her.

At Havre, Bordeaux, Marseilles and Genoa, the establishment of direct lines was urged as a matter of supreme importance. In the opinion of the Commission the service could be better rendered by the adoption of an Imperial scheme of mobilization of our transportation resources. While direct lines have their advantages, it was felt that many of the subsidized lines in the past had not rendered the service which might have been expected from them.

In the Italian Conference which the Commission held, it was pointed out that one of the assets which Italy boasted was surplus manual labor, which gave rise to the large emigration of recent years. While it is not likely that the emigration movement from Italy to Canada will assume pre-war proportions for some time to come, still, it may be reasonably expected that the movement of emigrants from Italy to Canada, would in a large measure compensate for any shortage of cargo from that country to Canada on the return voyage. It may be recognized that full cargoes from both France and Italy to Canada could not always be looked for, seeing that Canadian shipments were of large bulk as a rule—lumber, wheat, etc., whereas French and Italian cargoes consist of finer and less bulky goods.

It may be claimed that Governmental interest in transportation would encourage mainly a certain section of the community; but looked at broadly an ocean service is simply a sort of bridge between one country and another, and while the direct benefit which may be enjoyed by one section is manifest, all sections profit by the easier and cheaper means of transit.

As the conditions brought about by the war are abnormal, the Commission does not wish to deal specifically with them as regards transportation. The question for the future will be the prevention of conditions which interfere with cheap and adequate distribution of Canada's products.

The Commission ventures to suggest that the question of ship-building in Canada should receive the most careful attention of the Government. It is convinced that the expansion of this industry would contribute much to the industrial welfare of Canada, and at the same time would help in some measure to provide the additional tonnage required to bring about a better condition in the matter of transportation.

The Commission is strongly of opinion\* that no subsidies, bounties or other concessions, should be granted to any steamship companies or to individual vessels until the whole question of transportation has been thoroughly studied, and not until the methods of moving our grain, etc., are based upon sound and scientific methods.

The Commission on more than one occasion in Great Britain had the question of unsatisfactory bills of lading brought to their notice. The claim was put forward that bills of lading should be uniform, that a standard should be fixed which would be equitable to the shipper and to the shipping companies. The Commission feels that this subject is one of great importance and merits the careful attention of the Department of Trade and Commerce.

It was suggested to the Commission that an expert official should be employed by the Department of Trade and Commerce to advise on shipping matters, to watch freight rates, movements of shipping, and to act as general adviser to exporters and importers on all matters connected with transportation of goods by sea.

The Commission found at all shipping points in Great Britain, that there was a strong desire to encourage Canadian trade. This applies perhaps with special reference to Bristol, where the dock authorities have made special provision for handling Canadian produce and welcome every indication of increased trade with Canada. Cold storage plants of the most modern type, and grain warehouses have been erected, and the Commission was assured that every possible encouragement would be given to merchandise coming from the Dominion.

Hull has also made special provision for Canadian trade, and would be disposed to give every possible facility for this development.

Manchester importers and exporters display the keenest interest in Canadian trade and desire that the traffic between that port and the Dominion should grow. The wonderful development of the Trafford Park Estate promises to place Manchester in a unique position for handling and storing goods.

London, Liverpool, Glasgow and Belfast also encourage the development of Canadian imports and exports, and are prepared to encourage to the full any efforts which are made for its expansion.

\*Mr. Hatheway dissenting

In France the Port Authorities at Havre, Nantes, Bordeaux, Marseilles, all expressed the desire that trade between their ports and the Dominion should increase. At Havre, Bordeaux and Marseilles, the Commission found that special provision had been made for handling cargoes such as Canada is prepared to send to France. In these ports extensive improvements were being carried out by the Harbour Commissioners for the purpose of extending the facilities of the ports, in the building of warehouses and providing mechanical appliances for loading and unloading vessels, so as to reduce to a minimum the time occupied in discharge and receipt of cargo.

Nantes was also visited by one of the Commissioners and the same evidence of good-will and desire to foster the trade between Canada and France was manifest. The Commissioners are now advised that a direct line has already been established between Canadian ports and Ste. Nazaire.

The main port of Italy, Genoa, was visited by the Commission, which found that extensive improvements are being executed in the harbour and facilities were being provided for loading and unloading, which the port has not hitherto possessed.

The Commission feels that it can only report conditions respecting freight rates as they find them, but they would reaffirm that they believe the question is a matter of such material importance to the country's export and import business, that it recommends as strongly as possible a complete Governmental survey of the freight situation, and prompt application of such remedial measures as may be found necessary.

One of the most important factors that will have to be considered by the Canadian authorities in connection with the encouragement of vessels to use the St. Lawrence route, will be the question of an improved rate of insurance. Exactly how this is to be done does not come within the province of the Commission, but undoubtedly until the high rate of insurance charged on vessels coming up the St. Lawrence is remedied, there will be reluctance on the part of the ship owners to send their vessels to Quebec and Montreal, as the difference in premium constitutes a serious charge on the vessel. It may, however, be suggested that the plan adopted by the British Government for controlling marine insurance rates be seriously considered by the Canadian Government. Some improvement is vital to the development of the St. Lawrence route, even if the Canadian Government has to absorb the difference between the insurance rates to Quebec and Montreal, where they are higher than those to other North Atlantic ports.



## Fiscal Questions

While the Commission was not desirous of discussing fiscal questions, it found that this factor presented itself at practically every point.

In Great Britain while attending meetings of the Convention of the Associated Chambers of Commerce of the Empire, it was able to gather the sentiments of the different units of the Dominions beyond the Seas.

At the meetings held at Skinner's Hall, London, June 6th, 7th, and 8th, the question of tariffs between the different parts of the Empire—the allies, neutrals and enemy countries, was brought up. As a result of the discussion which then took place, the following resolution was passed with practical unanimity—there were only two dissentients:—

“That this Conference endorses the resolution passed at the Special Meeting of the Association of Chambers of Commerce of the United Kingdom on February 29th and March 1st, 1916, and urges that arrangements should be made at the earliest possible moment to provide (a) for preferential reciprocal trading relations between all parts of the British Empire. (b) for reciprocal trading between all parts of the British Empire and the Allied countries (c) for the favourable treatment of neutral countries, and (d) for restricting by tariffs and otherwise trade relations with all enemy countries, so as to render dumping or a return to pre-war conditions impossible. That copies of this resolution be communicated to all the Governments of the Empire.”

During the Conference in Great Britain it was manifest that the British people were preparing themselves for some fiscal changes. There was an evident desire to defend the position of industry in the United Kingdom and to prevent a return to the old conditions under which so many staple British trades had been undermined.

It is impossible for the Commissioners to predict in any way what will be the outcome of Britain's travail in this matter. They can simply record the fact that there was even in the strong Free Trade centres, an evident disposition to reconsider the question of England's past fiscal policy. Many pronounced Free Traders in the light of recent events, stated that they were disposed to review their position with the object of putting an end to the unfair competition to which Great Britain had been subjected.

Subsequent to the meeting of the Convention of the Association of the Imperial Chambers of Commerce in London, the Economic Conference of the Allied Governments met in Paris under the presidency of Monsieur Clementel, Minister of Commerce, on 14th, 15th, 16th, and 17th June, 1916, for the purpose of fulfilling the mandate given to them by the Paris Conference of 28th March, 1916, in order to give practical expression to their solidarity of views and interests and of proposing to

their respective Governments the appropriateness of the time for realising that solidarity. After considerable discussion, this Economic Conference made several recommendations. Their proposed measures for the war period do not come within the province of this report, but the suggested transitory measures for the operating of commercial, industrial, agricultural and maritime reconstruction of the allied countries, are as follows:

- I. The Allies declare their common determination to ensure the re-establishment of the countries suffering from acts of destruction, spoliation and unjust requisition, and decide to join in devising means to secure restoration to those countries as a prior claim, for their raw materials, industrial and agricultural plant, stock, and mercantile fleet, or to assist them to re-equip themselves in these respects.
- II. Whereas the war has put an end to all the treaties of commerce between the Allies and the Enemy Powers, and whereas it is of essential importance that, during the period of economic reconstruction which will follow the cessation of hostilities, the liberty of none of the Allies should be hampered by any claim put forward by the Enemy Powers to most-favoured-nation treatment, the Allies agree that the benefit of this treatment shall not be granted to those powers during a number of years to be fixed by mutual agreement among themselves.

During this number of years the Allies undertake to assure to each other so far as possible compensatory outlets for trade in case consequences detrimental to their commerce result from the application of the undertaking referred to in the preceding paragraph.
- III. The Allies declare themselves agreed to conserve for the allied countries, before all others, their natural resources during the whole period of commercial, industrial, agricultural and maritime reconstruction, and for this purpose they undertake to establish special arrangements to facilitate the interchange of these resources.
- IV. In order to defend their commerce, their industry, their agriculture and their navigation against economic aggression resulting from dumping or any other mode of unfair competition the Allies decide to fix by agreement a period of time during which the commerce of the Enemy Powers shall be submitted to special treatment, and the goods originating in their countries shall be subjected either to prohibitions or to a special régime of an effective character.

The Allies will determine by agreement through diplomatic channels the special conditions to be imposed during the above mentioned period on the ships of the Enemy Powers.
- V. The Allies will devise the measures to be taken jointly or severally for preventing enemy subjects from exercising, in their territories, certain industries or professions which concern national defence or economic independence."

The most important recommendations by the Economic Conference at Paris, so far as this report is concerned, are the following:

- "I. The Allies decide to take the necessary steps without delay to render themselves independent of the enemy countries in so far as regards the raw materials and manufactured articles essential to the normal development of their economic activities.

These measures should be directed to assuring the independence of the Allies not only so far as concerns their sources of supply, but also as regards their financial, commercial and maritime organizations.

The Allies will adopt such measures as may seem to them most suitable for the carrying out of this resolution, according to the nature of the commodities and having regard to the principles which govern their economic policy.

They may, for example, have recourse either to enterprises subsidised, directed or controlled by the Governments themselves or to the grant of financial assistance for the encouragement of scientific and technical research and the development of national industries and resources; to customs duties or prohibitions of a temporary or permanent character; or to combination of these different methods.

Whatever may be the methods adopted, the object aimed at by the Allies is to increase production within their territories as a whole to a sufficient extent to enable them to maintain and develop their economic position and independence in relation to enemy countries.

- II. In order to permit the interchange of their products, the Allies undertake to adopt measures for facilitating their mutual trade relations both by the establishment of direct and rapid land and sea transport services at low rates, and by the extension and improvement of postal, telegraphic and other communications.

- III. The Allies undertake to convene a meeting of technical delegates to draw up measures for the assimilation, so far as may be possible, of their laws governing patents, indications of origin and trade marks.

In regard to patents, trade marks and literary and artistic copyright, which have come into existence during the war in enemy countries, the Allies will adopt, so far as possible, an identical procedure, to be applied as soon as hostilities cease.

The procedure will be elaborated by the technical delegates of the Allies."

These recommendations were the unanimous finding of the Economic Conference and have been duly forwarded to the Governments interested. If followed out, it would mean that the Allied Powers would agree to adopt a common economic policy. The Economic Conference recommended strongly that in order to give effectiveness to their recommendations, they should be put into operation forthwith.

It will be seen from the findings of the British Associated Chambers of Commerce and the Economic Conference in Paris, that the leading statesmen and commercial leaders of the Empire are unanimous with regard to the policy to be pursued after the war. The possibility of carrying out the recommendations made by these two bodies, will depend entirely upon the attitude of Great Britain as to her fiscal policy. This will be the determining factor in any fiscal recommendations which may be made by the Allied nations, and until the policy of Great Britain is declared, any proposals for preferential tariffs between the Allies must be considered speculative.

In France there was a most pronounced tendency to favour preferential tariffs between the Allies. It was explained that France would have no difficulty in adopting this policy, as she had already a fiscal system that would enable her to make terms readily with the Allied countries. It was distinctly stated, however, by the Ministers in France, that nothing definite could be formulated until Great Britain had decided as to her future policy. Should the United Kingdom and the Empire decide upon a system of preferential tariffs, France would be most willing to enter into an agreement whereby Great Britain and the Dominions would be granted special concessions. Everything, however, it was pointed out, would depend upon the action of Great Britain in the matter. •

Italy's position was found to be much the same as that of France. Her Ministers declared their willingness to consider favourably the allied preferential plan. They expressed surprise that tariffs should be the battledore and shuttlecock of politics, and expressed themselves willing then and there, to modify their tariffs in favour of Canada, if a quid pro quo could be given. As to the establishment of a preferential plan with Great Britain and her other Allies, the Italian Ministers said that everything depended upon the steps Great Britain would take.

The impression of the Commission in the countries visited was, that it was desired that a preferential tariff should be given by each Allied nation to the other Allies—that there should be an intermediate tariff for neutral countries, and that enemy countries should be penalized as far as possible by a tariff wall, which, if not prohibitory, would restrain to a large extent the unfair competition and "dumping" methods which had been such an unsatisfactory feature of commerce during the past.

## Advertising Canada

As the result of its investigations, the Commission is of the opinion that a more systematic method of advertising Canada would be a distinct advantage to the Dominion.

At present there are many Government departments, private firms and institutions, who are in their own way advertising Canada, and in many instances doing the work very well indeed. It is manifest, however, that there is considerable loss of power and money owing to divided efforts in this direction. It should be possible for the Government to organize a definite scheme of advertising which would embrace the various interests, and thus secure co-ordination in the making of Canada and its resources better known throughout the world. It would be worth while employing an individual who has comprehensive grasp of all branches of advertising who would act as adviser in this important direction.

To the end that the products of Canada may be more satisfactorily placed before the peoples of Great Britain, France and Italy, the Commission would suggest that permanent exhibitions, not only of the raw, but of the manufactured products, should be shown in the most suitable centres of the countries named. To some extent, this is practised locally in Great Britain, but the plan might be extended, and certainly might be inaugurated in France and Italy with great advantage.

The Commission would also recommend that a special trade representative should be appointed in France to look after purely commercial interests, as the character of the calls upon the services of the Commissioner General of Canada, in Paris, at the present time preclude him from taking too direct an interest in commercial matters. Such a commercial representative in Paris would contribute very materially to the extension of Canadian export trade.

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# Appendix

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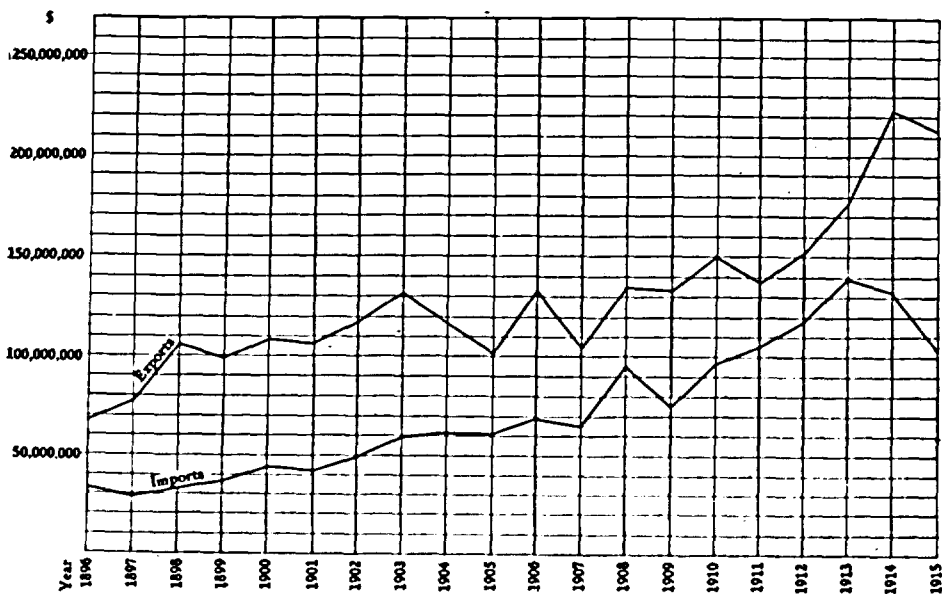
## Explanatory Note

The tables and charts which follow are intended to enable readers to see at a glance the state of trade before the war between Canada and the countries which the Commission visited.

To indicate normal pre-war conditions, particularly with respect to the competition which Canada must expect in these markets, the trade returns of the British, French and Italian Governments for the year 1913 have been utilized. The figures of this one year, it is thought, will give a more satisfactory view of the situation than those of a series of years, or than an average over several years.

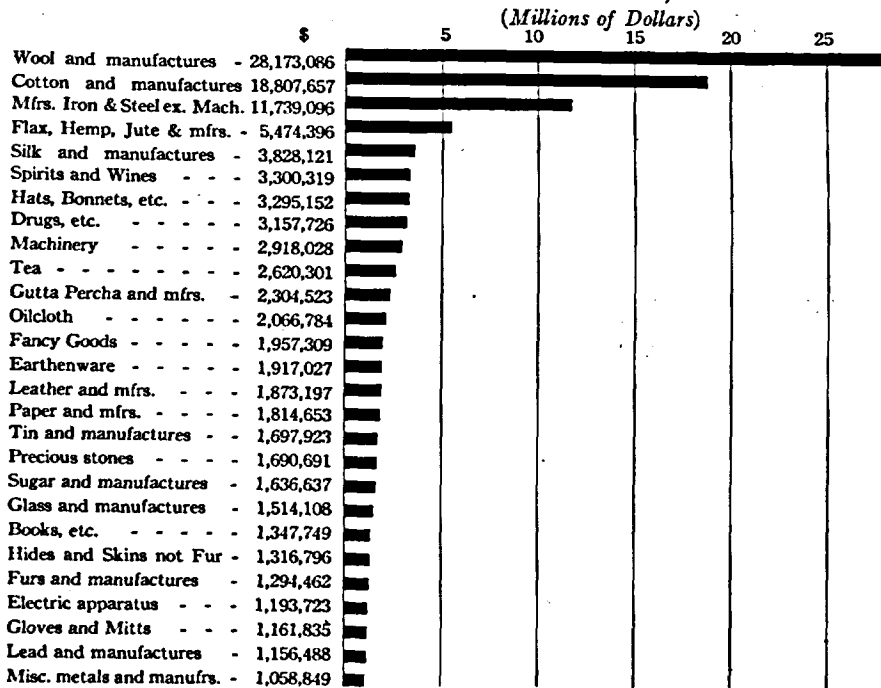
No details have been given with regard to Belgium. British returns are in pounds sterling. Italian import figures, originally in lire, have been converted to dollars. The French customs imports statistics do not give details of values, but only of weights of goods received from abroad. These details have been left in the original Metric Quintals (220.46 pounds) and the total value of any class of import has been converted from francs to dollars. The French imports are for consumption, those of the other countries are general imports.

## UNITED KINGDOM

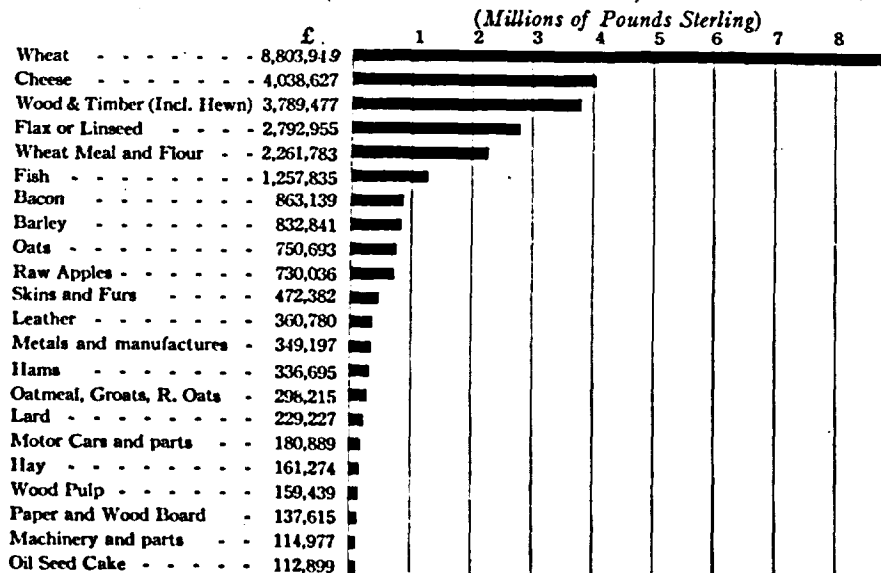
CANADA'S TRADE WITH UNITED KINGDOM  
1896-1915Merchandise  
(Canadian Government Returns)

(Fiscal year ending March 31st. Year 1907, nine months only).

Principal Imports of British Goods into Canada, 1913  
(Canadian Government Returns)



Principal Imports of Canadian Goods into United Kingdom, 1913  
(Board of Trade Returns)

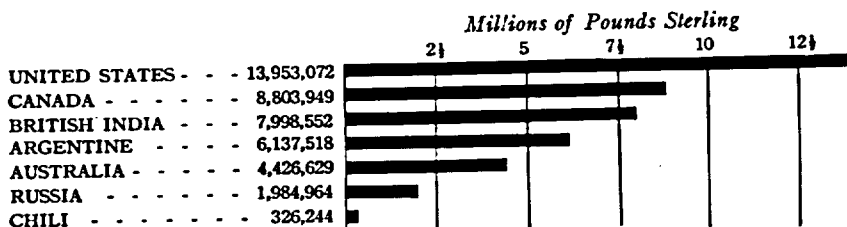




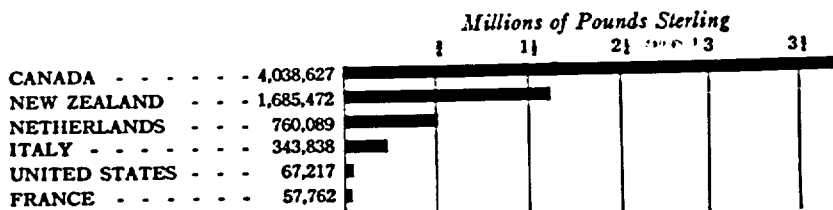
## Canada's Competition in United Kingdom

Imports, by Principal Countries of Origin, into United Kingdom in 1913, of Goods which Canada Exports thereto in Largest Quantities. Board of Trade Returns. (Charts follow order of table preceding).

### WHEAT

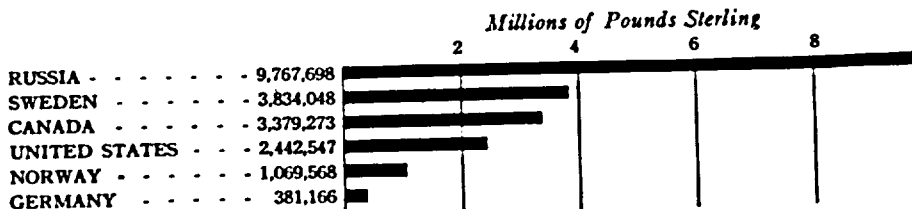


### CHEESE

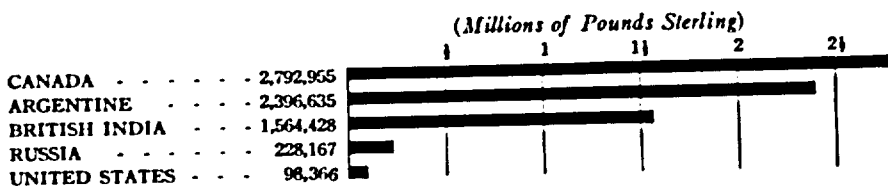


### WOOD AND TIMBER

Sawn or split, planed or dressed and Sleepers

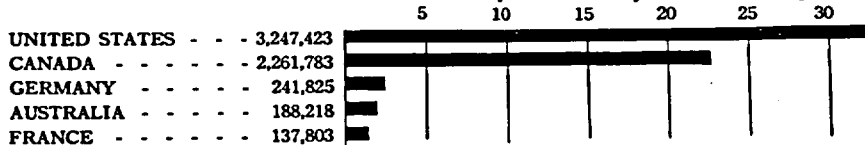


### FLAX OR LINSEED



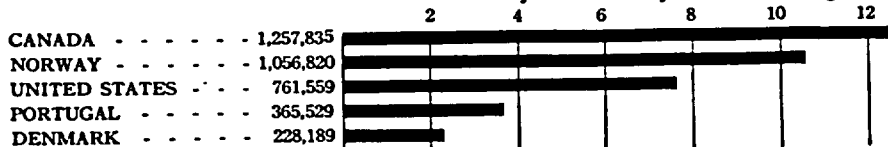
**WHEAT MEAL AND FLOUR**

*Hundreds of Thousands of Pounds Sterling*



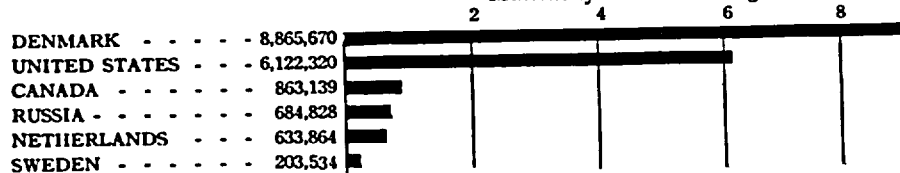
**FISH OF ALL KINDS  
Except Oysters for Breeding**

*Hundreds of Thousands of Pounds Sterling*



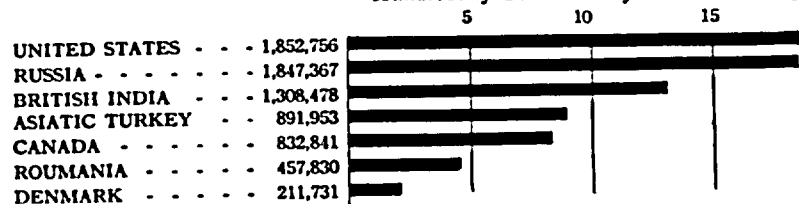
**BACON**

*Millions of Pounds Sterling*



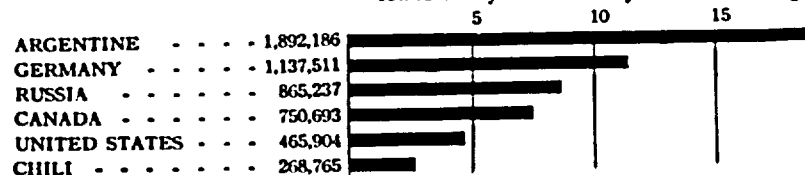
**BARLEY**

*Hundreds of Thousands of Pounds Sterling*



**OATS**

*Hundreds of Thousands of Pounds Sterling*

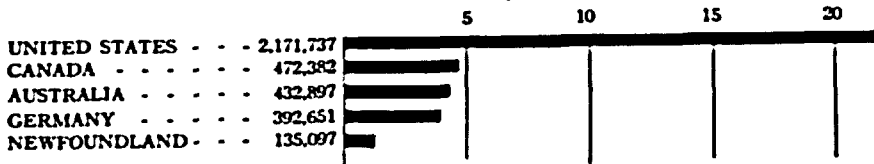


## RAW APPLES

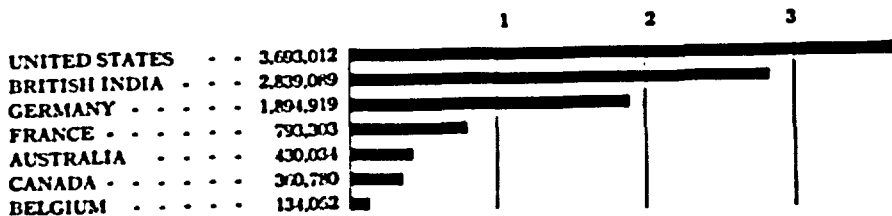
*Millions of Pounds Sterling*

## SKINS AND FURS

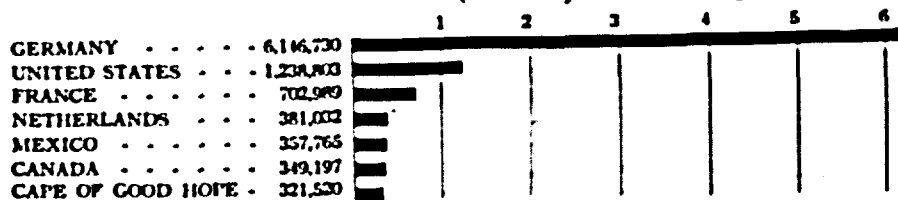
(Other than Goat, Sheep and Rabbit) Unenumerated, and Sealskins, Undressed

*Hundreds of Thousands of Pounds Sterling*

## LEATHER

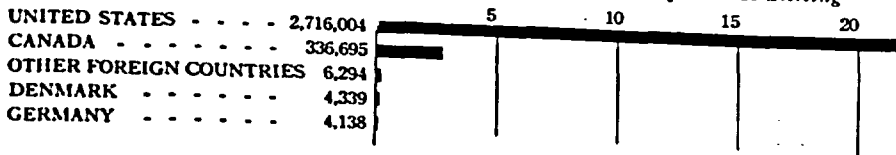
*(Millions of Pounds Sterling)*

## METALS AND MANUFACTURES THEREOF

*i.e., Copper Regulus and Precipitate, Iron and Steel of all kinds (excluding old iron, except old rails), Zinc, Crude, Metal unenumerated in Import List, unwrought.**(Millions of Pounds Sterling)*

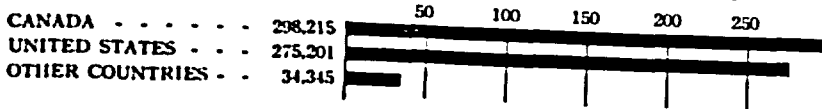
**HAMS**

*Hundreds of Thousands of Pounds Sterling*



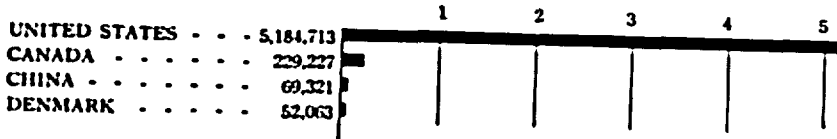
**OATMEAL, GROATS**

*Thousands of Pounds Sterling*



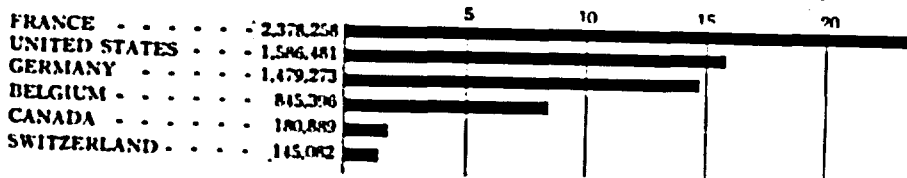
**LARD**

*Millions of Pounds Sterling*



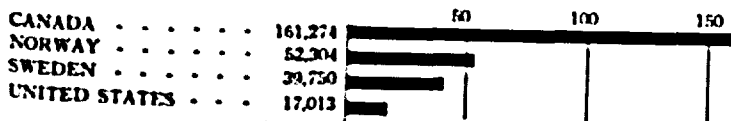
**MOTOR CARS AND PARTS THEREOF**

*Hundreds of Thousands of Pounds Sterling*

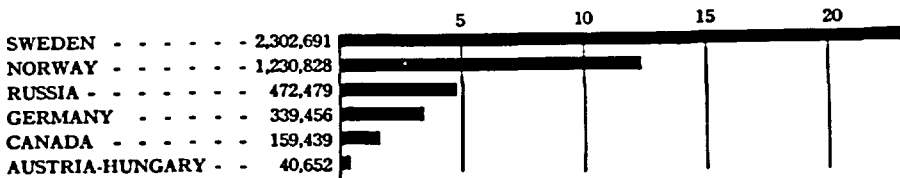


**HAY**

*Thousands of Pounds Sterling*

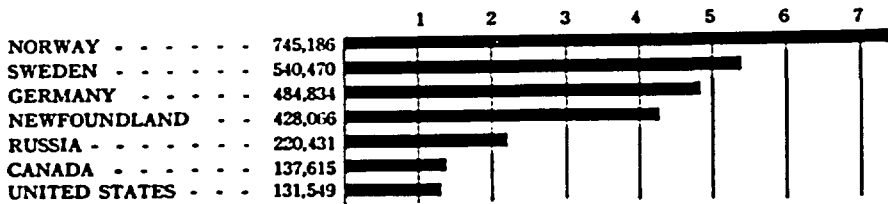


## WOOD PULP

*Hundreds of Thousands of Pounds Sterling*

## PAPER FOR PRINTING OR WRITING

Millboard and Woodpulp Board

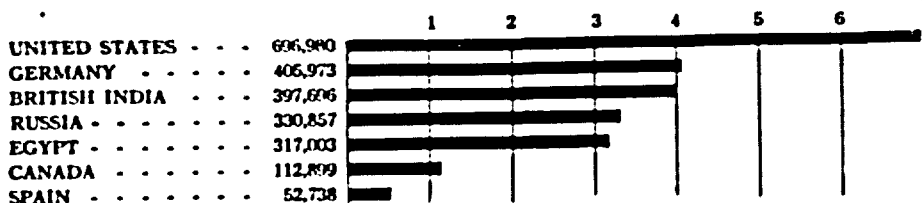
*Hundreds of Thousands of Pounds Sterling*

## MACHINERY AND PARTS THEREOF

*Millions of Pounds Sterling*

## OILSEED CAKE

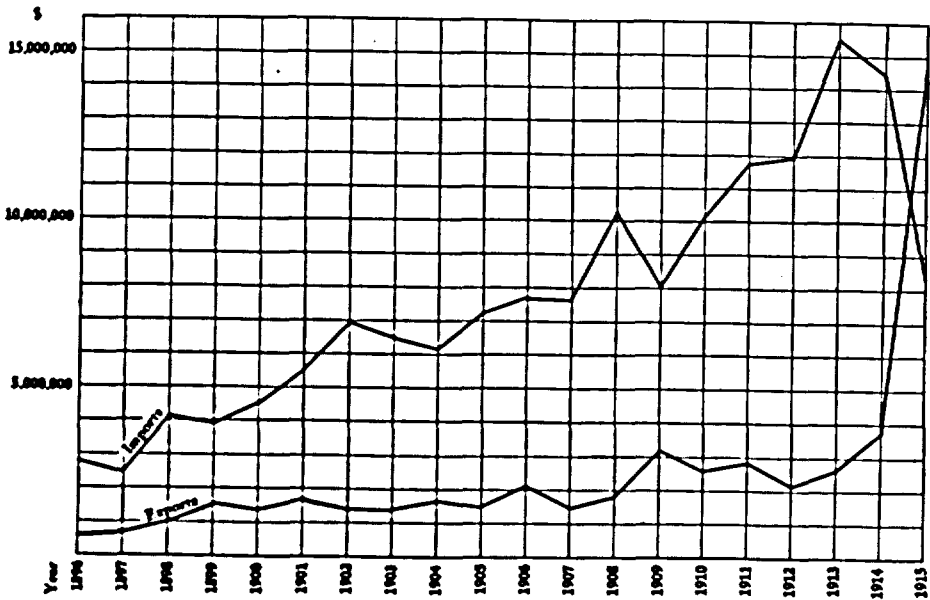
(Cottonseed, Linseed and others)

*Hundreds of Thousands of Pounds Sterling*

FRANCE

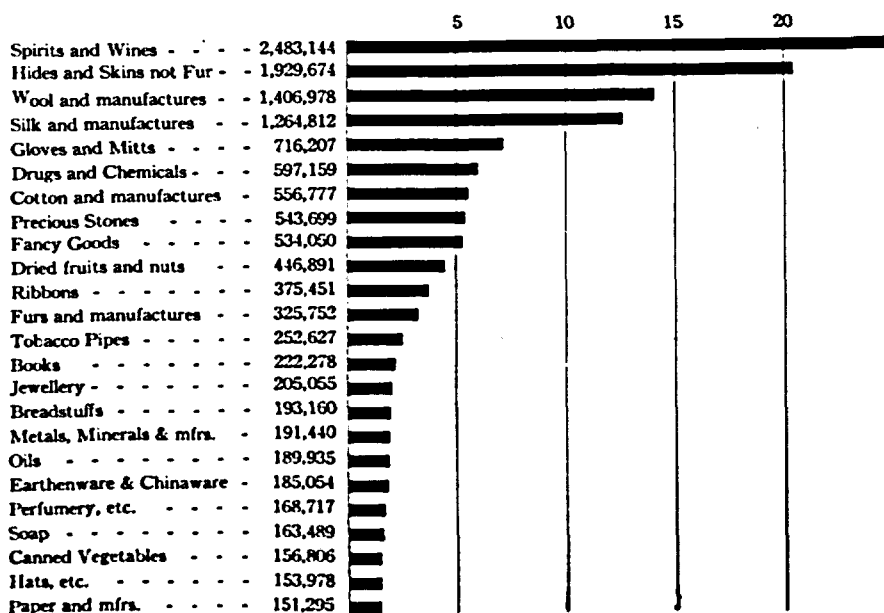
CANADA'S TRADE WITH FRANCE  
1896-1915

Merchandise  
(Canadian Government Returns)



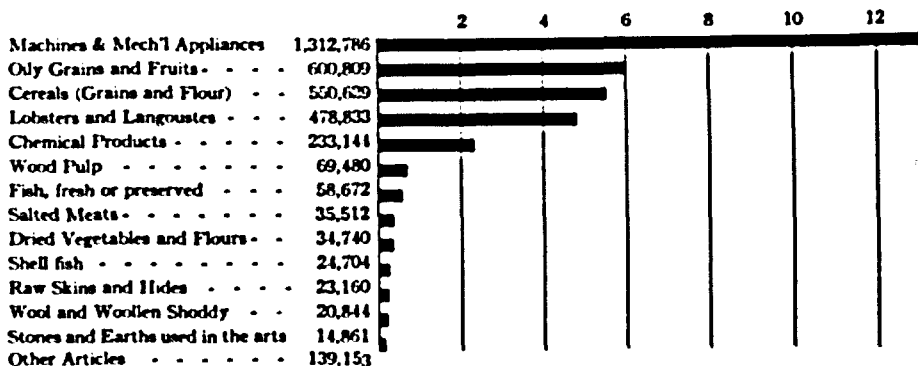
## Principal Imports of French Goods into Canada, 1913 (Canadian Government Returns)

*(Hundreds of Thousands of Dollars)*



## Principal Imports of Canadian Goods into France, 1913 (French Government Returns)

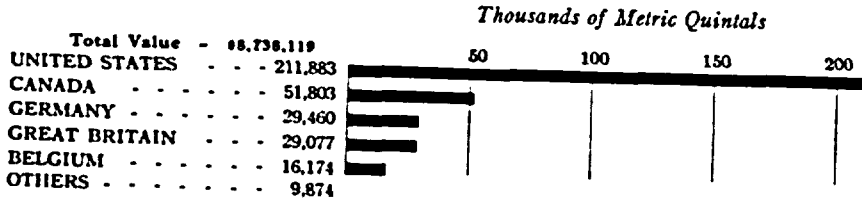
*Hundreds of Thousands of Dollars*



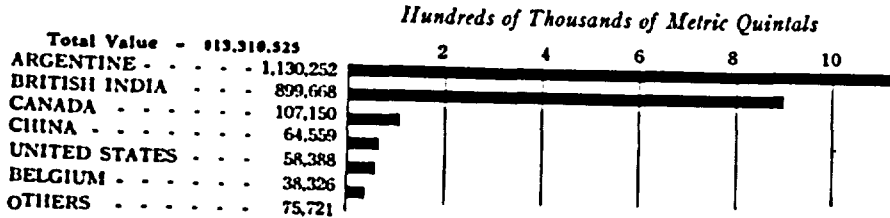
## Canada's Competition in France

Imports, by Principal Countries of Origin, into France in 1913, of Goods which Canada Exports thereto in Largest Quantities. French Government Returns. (Charts follow order of preceding table but do not in all cases correspond exactly).

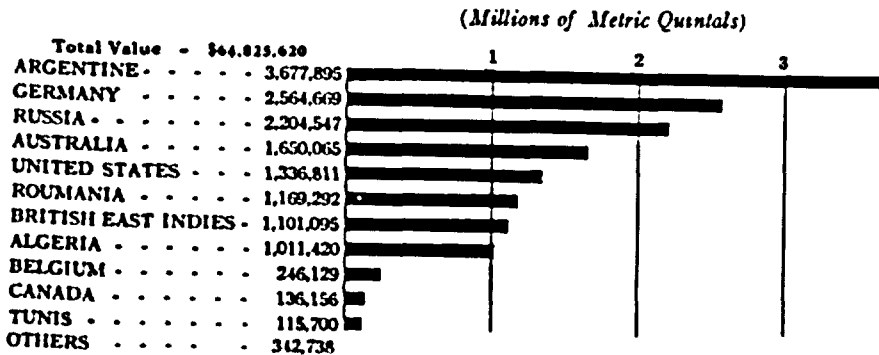
### AGRICULTURAL IMPLEMENTS



### FLAX SEED

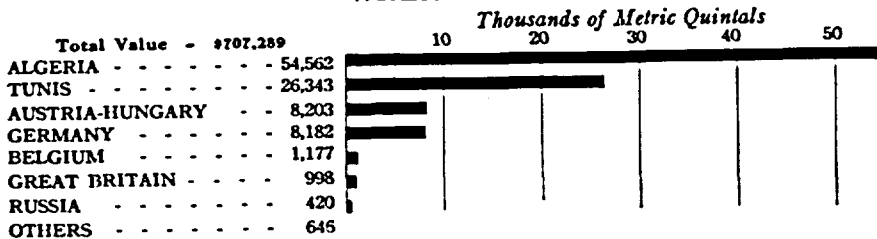


### WHEAT

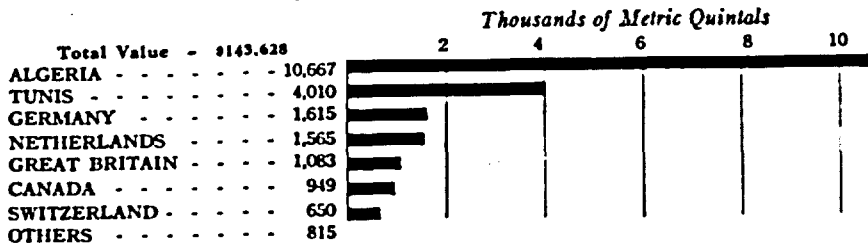




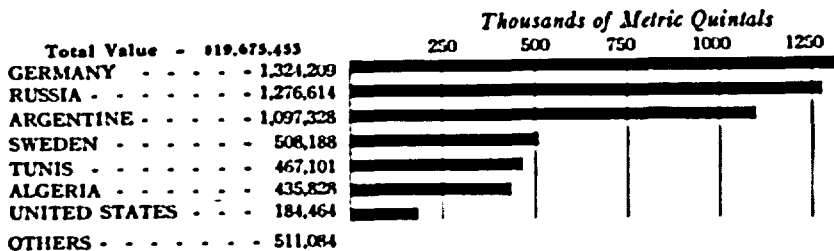
## WHEAT FLOUR



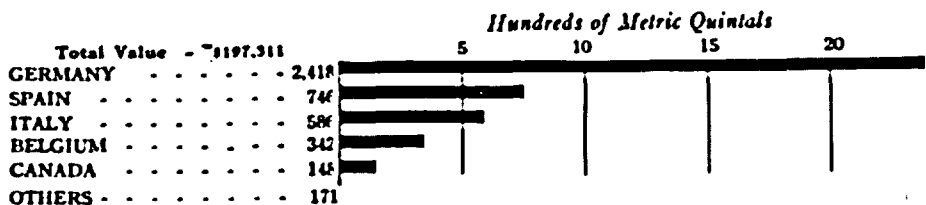
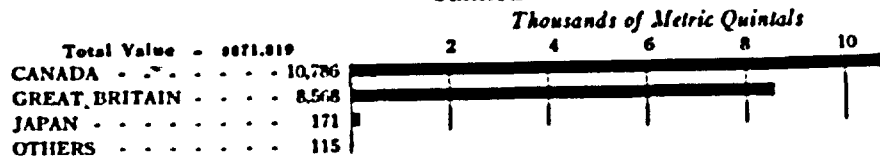
## GROATS, OATMEAL, ROLLED OATS, Etc.



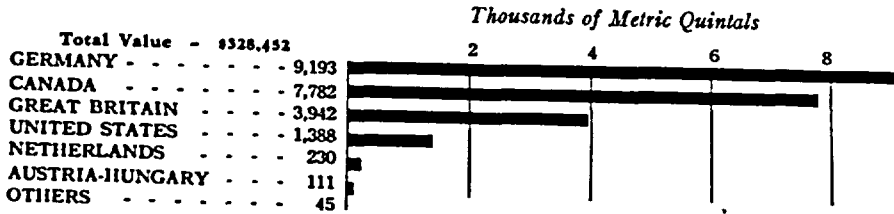
## OATS



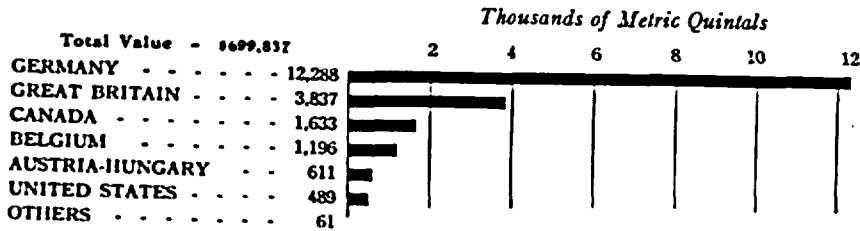
## CLOVER SEED, Etc.

LOBSTERS  
Canned

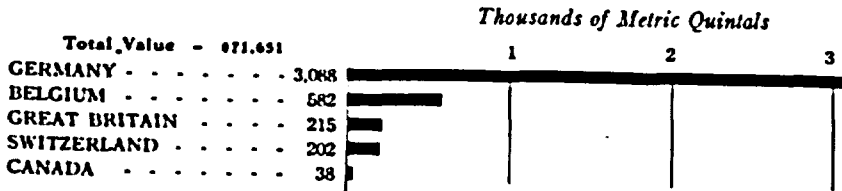
METHYL ALCOHOL



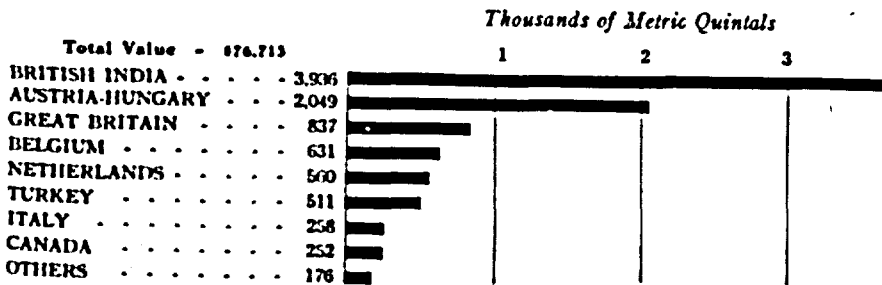
ACETONE



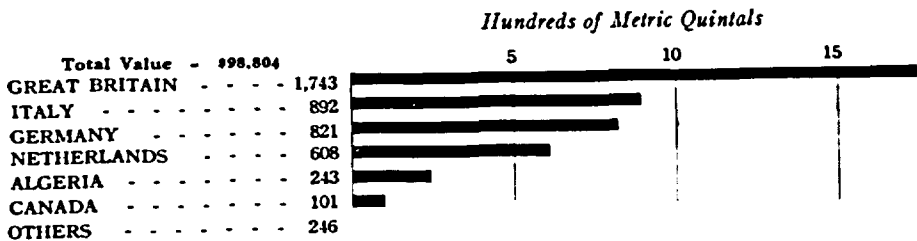
FORMIC ALDEHYDE



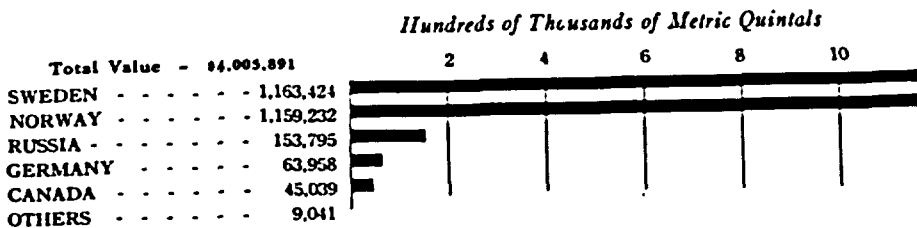
TANNIC EXTRACTS



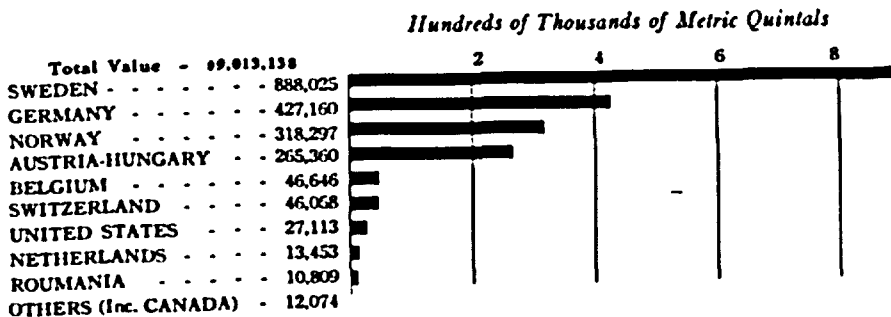
## PURE ALCOHOL



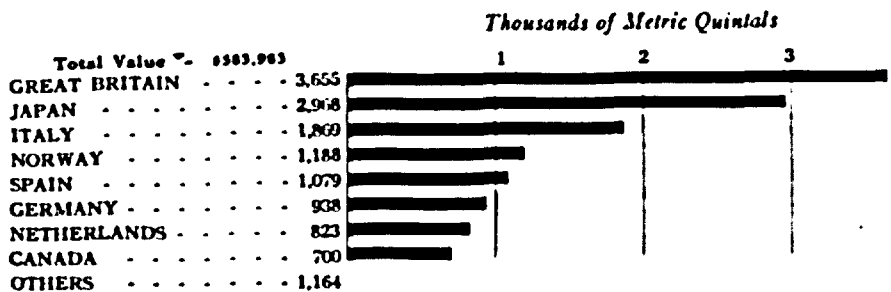
## MECHANICAL PULP, DRY



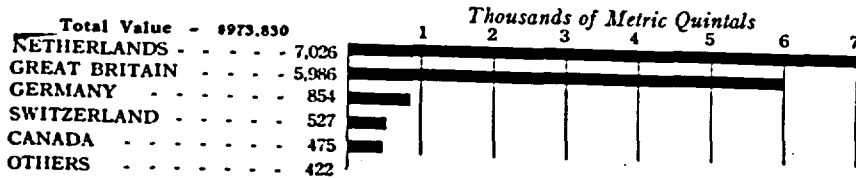
## CHEMICAL PULP



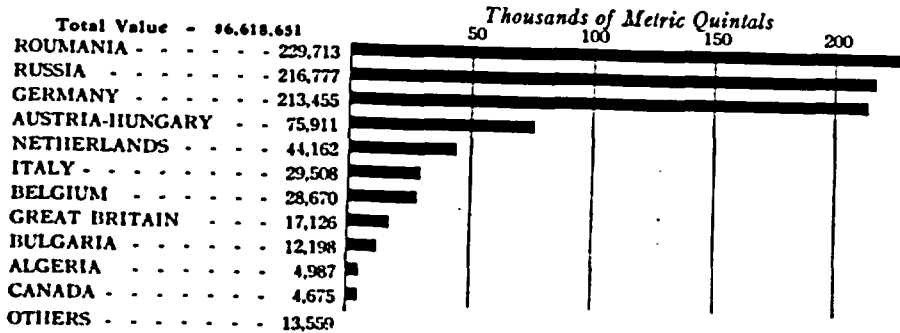
## FISH, Preserved or Prepared, other than Sardines



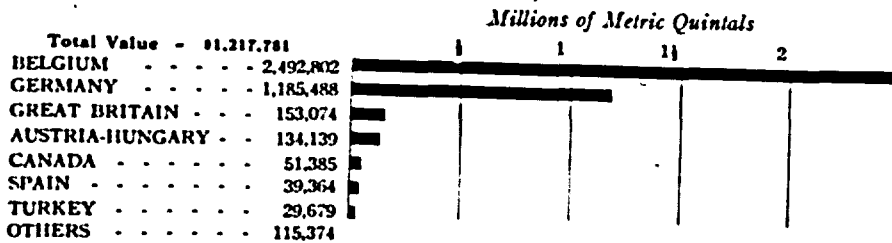
FRESH SALMON



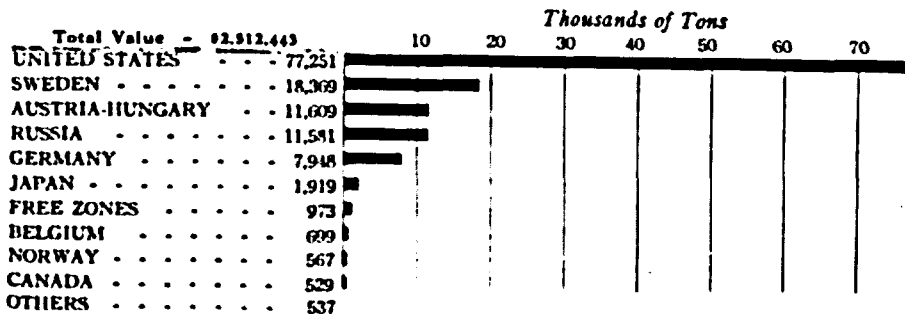
DRY VEGETABLES AND FLOURS THEREOF  
Other than Beans and Peas



VARIOUS STONES FOR USE IN THE ARTS  
CRUDE TALC, Etc.

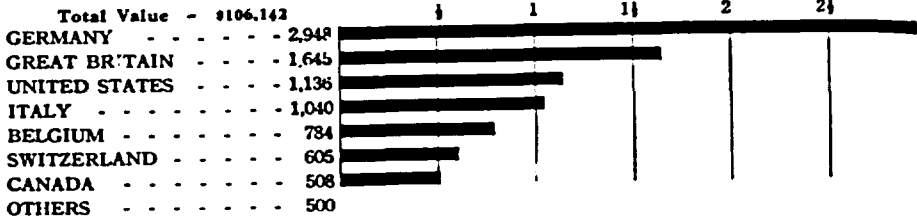


STRUCTURAL TIMBER  
Square or Sawn, more than 80 millimetres thick



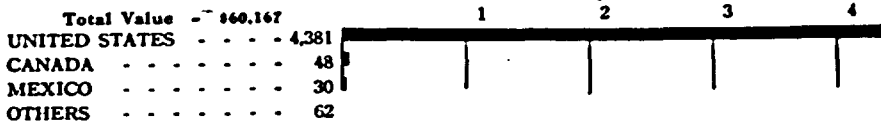
## SUNDRY ARTICLES MADE OF WOOD

Thousands of Metric Quintals



## DRIED APPLES

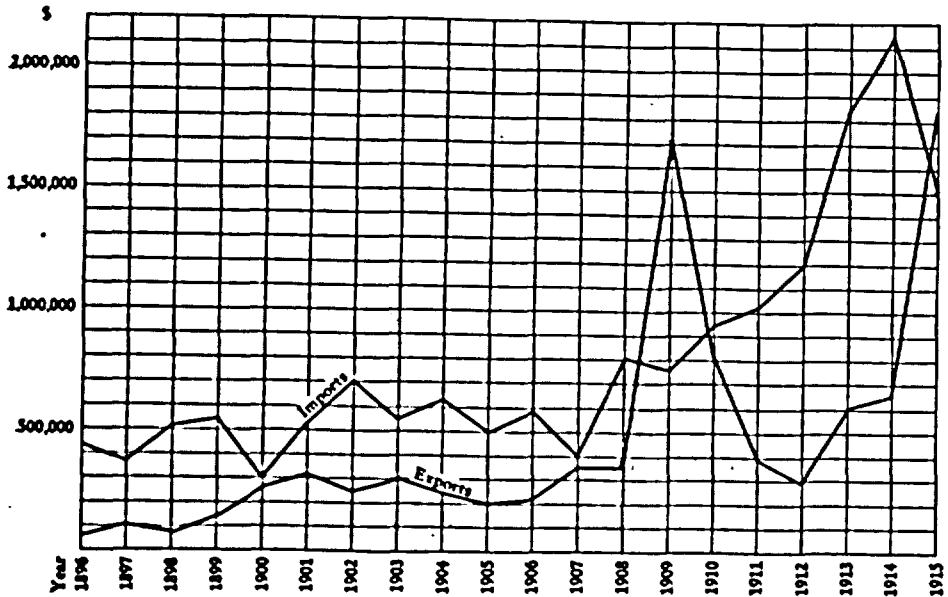
Thousands of Metric Quintals



ITALY

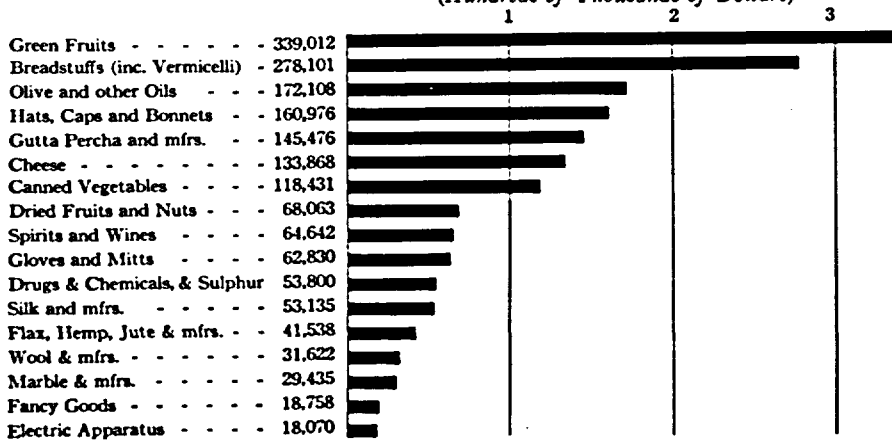
CANADA'S TRADE WITH ITALY  
1896-1913

Merchandise  
(Canadian Government Returns)



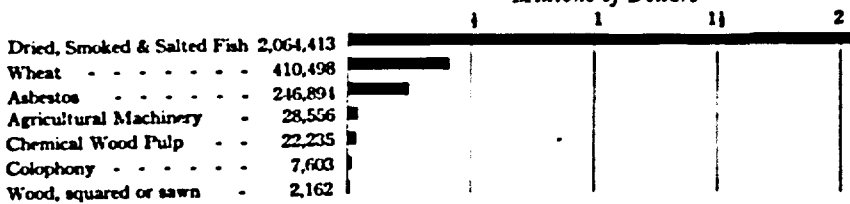
## Principal Imports of Italian Goods into Canada, 1913

(Hundreds of Thousands of Dollars)



## Principal Imports of Canadian Goods into Italy, 1913

Millions of Dollars



## Canada's Competition in Italy

Imports, by Principal Countries of Origin, into Italy in 1913, of Goods which Canada Exports thereto in Largest Quantities. Italian Government Returns. (Charts follow order of table preceding).

## FISH

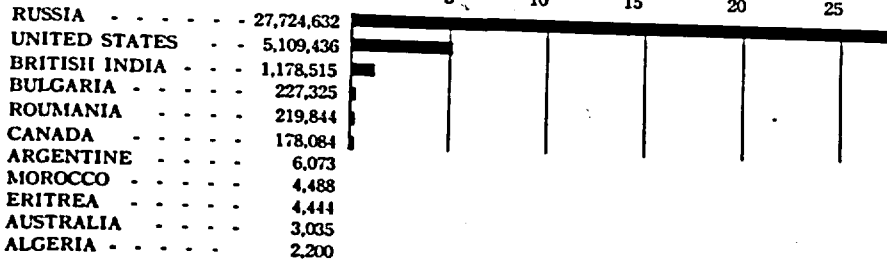
## Dried, Smoked and Salted

Millions of Dollars



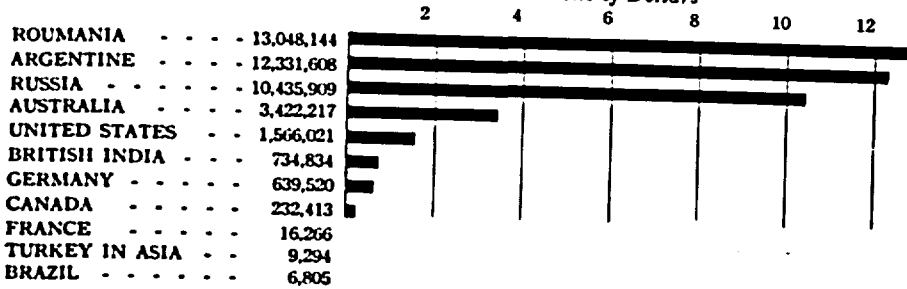
**HARD WHEAT**

*Millions of Dollars*



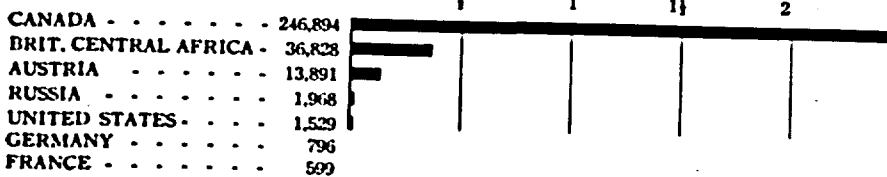
**SOFT WHEAT**

*Millions of Dollars*



**ASBESTOS**

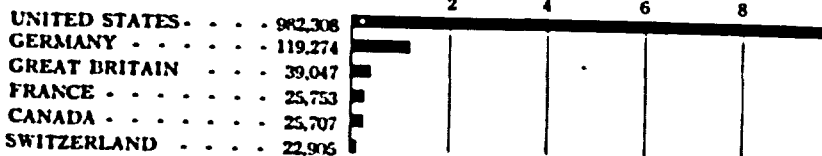
*Hundreds of Thousands of Dollars*



**AGRICULTURAL MACHINERY**

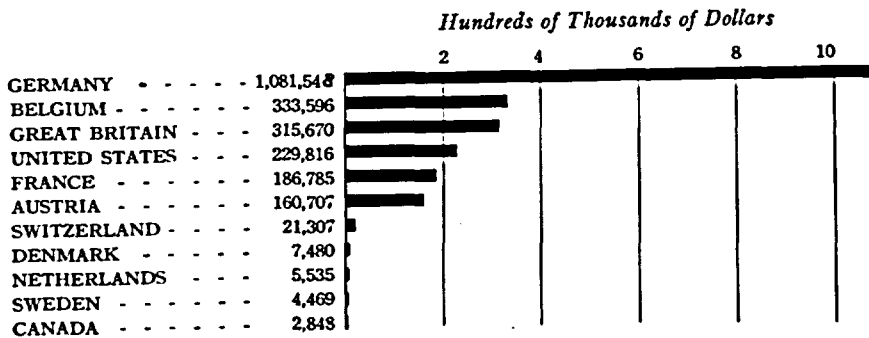
**Mowers and Reapers**

*Hundreds of Thousands of Dollars*

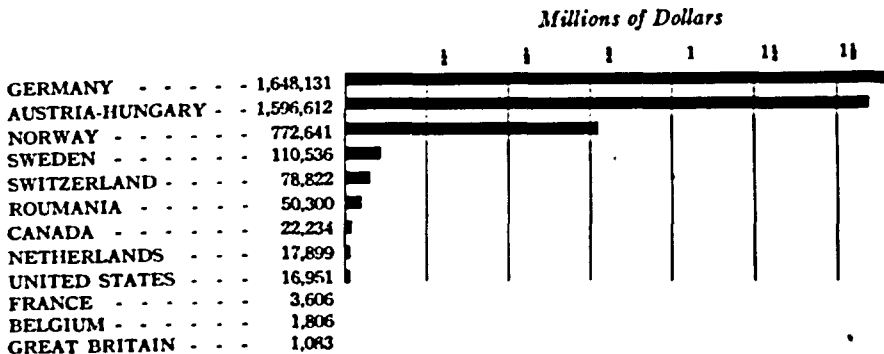




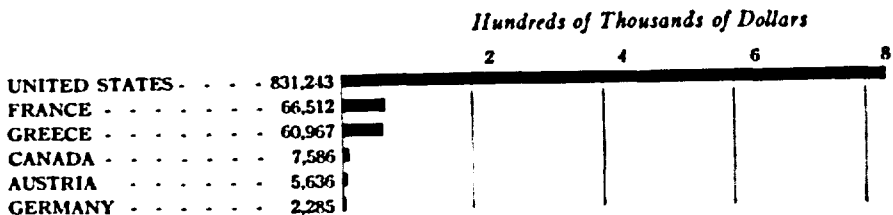
### AGRICULTURAL MACHINERY Other than Mowers and Reapers



### CELLULOSE OF WOOD, STRAW, ETC.



### COLOPHONY



TIMBER

Common Wood, squared or sawn into lengths (Northern Hemisphere woods only considered)

Millions of Dollars

		5	10	15
AUSTRIA-HUNGARY	- 17,448,628	[Bar extending past 15 million]		
UNITED STATES	- - 3,362,195	[Bar extending past 15 million]		
ROUMANIA	- - - - 648,209	[Bar extending past 15 million]		
RUSSIA	- - - - 260,878	[Bar extending past 15 million]		
FRANCE	- - - - 128,016	[Bar extending past 15 million]		
GERMANY	- - - - 111,554	[Bar extending past 15 million]		
SWITZERLAND	- - - 96,461	[Bar extending past 15 million]		
SWEDEN	- - - - 63,497	[Bar extending past 15 million]		
JAPAN	- - - - 21,049	[Bar extending past 15 million]		
GREAT BRITAIN	- - - 13,124	[Bar extending past 15 million]		
NORWAY	- - - 8,839	[Bar extending past 15 million]		
DENMARK	- - - - 8,781	[Bar extending past 15 million]		
BELGIUM	- - - - 5,423	[Bar extending past 15 million]		
NETHERLANDS	- - - 2,470	[Bar extending past 15 million]		
CANADA	- - - - 2,161	[Bar extending past 15 million]		

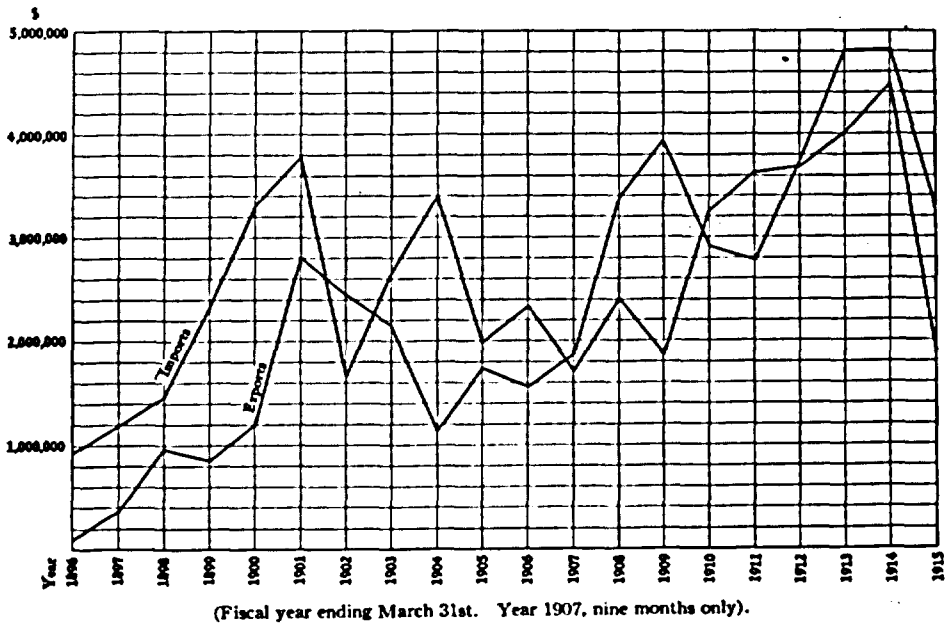
## BELGIUM

## CANADA'S TRADE WITH BELGIUM

1896 to 1915

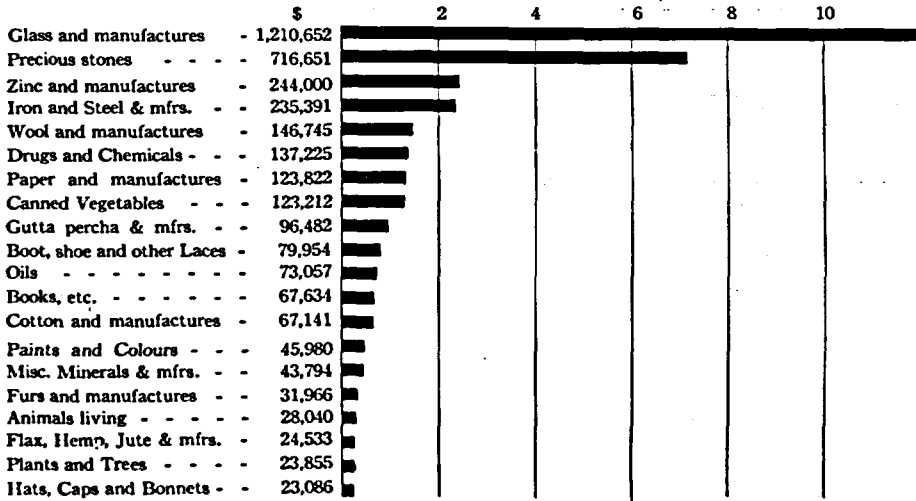
Merchandise

(Canadian Government Returns)



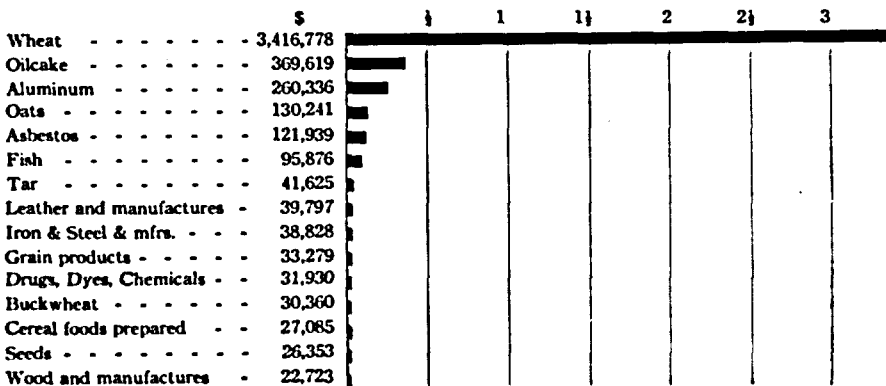
Principal Imports of Belgian Goods into Canada, 1913

(Hundreds of Thousands of Dollars)



Principal Exports of Canadian Goods to Belgium, 1913

(Millions of Dollars)



## HEALTH RESORTS AND THERMAL STATIONS OF FRANCE

<b>AIX-LES-BAINS</b> (Savoy), Lac du Bourget, Season: April to November.	Hot Sulphur Springs, Douches, Massage, cure for rheumatism, gout, arthritis complaints, effects of wounds.
<b>BESANCON</b> (Franche Comtè.) Season: May to September.	Bromo-Iodine and Sodie Waters. Lymphatism, scrofula, adenitis, osseous and articular affections, women's diseases. Tumours.
<b>BOURBON L'ARCHAMBAULT</b> (Central France), Ry. Station Moulins. Season: May to October.	Sodic-Chloro, Iodurated and Radio-Active Waters 53° cures for arthritis, rheumatism and paralysis, effects of wounds.
<b>CHALLES-LES-EAUX</b> (Savoy), Ry. Station Chambéry Season: May 15 to October 15.	Sulphurated, Strong Bicarbonated, Sodie Bromo-Chlorated Waters for affections of the throat, ears and nose. Treatment of lymphatism and skin diseases.
<b>CHATEL-GUYON</b> (Auvergne), Season: May to October 15.	Sodio-Magnesia, Lithia and Ferruginous Waters of the Miration Spring (absolutely free) Treatment for constipation, enteritis, dyspepsia, appendicitis, and stomach complaints.
<b>POUGUES-LES-EAUX</b> (Central France), Season: June to October.	Calcic Bicarbonated Springs, cure for dyspepsia, enteritis, diabetes, neurasthenia, illnesses consequent on impoverishment of the blood.
<b>EVIAN-LES-BAINS</b> (Lake of Geneva). Season: May to October	Source Cachat. Treatment for chronic gout. Digestive and urinary organs, kidneys, liver complaints and arterio-sclerosis.
<b>ROYAT</b> (Auvergne), Season: May to October.	Altitude 1,400 feet. First-class drinking water, special treatment for affections of the heart and blood vessels, anaemia, gout, etc.
<b>ST. NECTAIRE</b> (Auvergne), By P. L. M. Motor Service from Issoire Season: May to October.	Combined Bicarbonated Springs. For the treatment of albuminuria and lymphatic children.
<b>URIAGE-LES-BAINS</b> (Dauphiny), Season: May to October.	Sulphur and Alkaline Springs. Cure for lymphatics and skin diseases.
<b>VALS-LES-BAINS,</b> (Ardèche), At foot of Cevennes. Season: May to October.	Source Vals-Saint-Jean. Aerated Sodie-Bicarbonated and Ferruginous Arsenical Springs, for affections of the digestive organs and stomach, arthritis, gout, diabetes, obesity and marsh fevers.
<b>VICHY,</b> (Central France), Season: May to October.	World-renowned for its Mineral Waters. Sodio-Bicarbonated Springs, treatment for liver, stomach, gout, gravel, arthritis.
<b>LA BOURBOULE.</b>	Mineral Waters, Ferruginous Arsenical Springs.
<b>LE MONT DORE.</b>	Mineral Waters, Ferruginous, Saline, Lithia and silicious, radio-active waters.