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COVER SUBJECT—New shed erected at the Canada Dock, Liverpool, replacing that destroyed during the last war by enemy aircraft. Terminus of many steamship services, including a number connecting Canada with the United Kingdom, Liverpool and Merseyside are familiar names to traders throughout the world. As indicated by M. J. Vechsler, Canadian Trade Commissioner at Liverpool, his territory embraces ninety-nine cities with a population of more than 50,000, a large number of which are served by facilities in the port of Liverpool.

Photo by Stewart Bale, Limited

United Kingdom Trade Last Year Reflects Adverse Trade Balance

Value of exports, £911,686,238, nearly twice 1938 figure of £470,755,320, while imports totalled £1,297,682,580 compared with £919,508,933 in 1938—Increase due to rise in prices and not to volume—Imports from Canada of wheat, meat, dairy produce, fish, tobacco, pulp and paper, cutlery, hardware, implements, instruments, electrical goods and apparatus, and machinery among items showing decrease, whereas iron and steel and manufactures, copper, flour, fresh fruits and vegetables show increase—British exports to Canada insufficient to achieve greater measure of equilibrium in balance of payments.

By A. E. Bryan, Commercial Counsellor for Canada

LONDON, February 28, 1947.—The external trade of the United Kingdom in 1946, as shown in the returns just published, has evoked the general impression that progress was good, but not good enough. Value of exports of home produced goods (£911,686,238) was nearly twice the 1938 figure and the highest since 1920. The rise in prices, however, is largely responsible for this result, because the Board of Trade estimated that, in terms of quantity, exports were no higher than in 1938. Imports in 1946, valued at £1,297,682,580, were 50 per cent greater than in 1938; but by volume, last year's imports were only 70 per cent of those in 1938.

Re-exports have failed to show any recovery even over 1945. The statistics, compared with 1938 and 1945, are summarized in the following table, which also includes a calculation of the visible adverse balance of trade in the three years:

	1938	1945	1946
Imports	£919,508,933	£1,103,693,217	£1,297,682,580
Exports	470,755,320	399,275,982	911,686,238
Re-exports	61,524,646	50,988,697	50,348,445
Adverse balance (merchandise)	387,228,967	653,428,538	335,647,897

Adverse Balance of Payments

The excess of imports is considerably less than anticipated at the time of the United States loan negotiations. Certain adjustments are required to arrive at the true balance of payments; but according to tentative estimates, "invisible" exports (represented by shipping, insurance and similar earnings, and income from overseas investments) may have reached some £200 million. On the other side of the ledger, the situation is worsened by expenditures possibly of the order of £300 million for special overseas commitments incurred in Germany, Palestine and elsewhere. Assuming the accuracy of these estimates, the adverse balance of payments in 1946 may be reckoned to be in the neighbourhood of £435 million.

Imports by Main Commodity Groups

	1938	1945	1946
Food, drink and tobacco	£430,116,697	£ 498,926,785	£ 638,040,294
Raw materials and articles, mainly unmanufactured	248,058,885	293,849,913	384,947,940
Articles, wholly or mainly manufactured....	233,675,514	300,659,672	246,666,762
Animals, not for food	3,318,458	4,110,516	7,144,800
Parcel post	4,339,379	15,146,331	20,882,784
Total	£919,508,933	£1,103,693,217	£1,297,682,580



Nova Scotia apples being unloaded at Manchester last October from the S.S. *Manchester Trader*. The shipment was said to be the first received in Manchester since the outbreak of hostilities in 1939. Canada exported during 1946 a total of 1,577,065 barrels of fresh apples, valued at \$9,281,643, of which the United Kingdom received 1,151,054 barrels. (This figure includes boxed apples.)

Photo by Manchester Guardian

Britain Dependent on Canadian Supplies of Wheat

Total imports of wheat last year were 67,791,638 cwt. compared with 71,034,958 cwt. in 1945 and 101,626,356 cwt. in 1938. The virtual dependence of Britain on Canadian supplies, which amounted to 57,713,139 cwt. last year, is exemplified by the heavily reduced arrivals from former supplying countries. In spite of declining quantities, Britain's bill for wheat rose from £38,627,554 in 1938 to £66,751,457 in 1946.

Gross imports of oats last year were 2,098,675 cwt., practically the same as in 1945. Of this amount, Canada furnished 1,512,626 cwt.

In beans, Canadian supplies fell to 14,297 cwt. from 177,306 cwt. in 1945; but other sources (mainly the United States and Chile) were developed and total imports (718,410 cwt.) were greater than in 1945.

Total Flour Imports Remained Steady

Total imports of flour in 1946 (10,745,765 cwt.) remained steady, notwithstanding a fall of some 1,700,000 cwt. in United States shipments. The deficiency was made good by a remarkably high rate of imports from Canada, which reached 9,482,008 cwt. compared with 7,875,551 cwt. in 1945, and 3,652,616 cwt. in 1938. In the latter year, Australia contributed 2,930,469 cwt. against a merely nominal amount in 1946.

There was a sharp decline in imports from Canada of oatmeal, rolled oats, etc., with the result that total landings fell from 763,072 cwt. in 1945 to 69,509 cwt. in 1946. The corresponding Canadian figures were 555,028 cwt. in 1945 and 62,353 cwt. in 1946.

Slight Improvement in Meat Shipments

Imports of meat showed a slight improvement over the previous year. In frozen beef (fore and hind quarters), total supplied were stepped up from 2,135,504 cwt. in 1945 to 4,241,143 cwt. in 1946. While receipts from Canada in the latter year, 834,191 cwt., were lower, the Argentine, with 1,594,966 cwt., was the only country which exceeded this figure.

The individual bacon ration has recently been reduced from 3 to 2 ounces a week. This is a reflection of falling imports. In 1946, the United Kingdom purchased abroad 3,465,686 cwt. of bacon, only half the prewar quantity. Consignments from Canada last year were 2,539,536 cwt. which, although double the amount in 1938, was some 50 per cent less than in 1945. Danish supplies (801,096 cwt.) increased substantially during the year. The decline in imports of hams from Canada was even more marked, only 38,092 cwt. being recorded, against 117,926 cwt. in 1945.

Imports of Canadian Dairy Produce Lower

Imports from Canada of dairy produce also fell away during the year. In cheese, there was very little change. Gross imports amounted to 4,080,655 cwt., a slight increase over 1945; but Canada's share (1,052,659 cwt.) was some 10 per cent lower.

Total imports of eggs in shell, 81,318 thousand dozen, were less than a third of prewar but better than in 1945 (69,072 thousand dozen). Nevertheless, Canada, with 36,904 thousand dozen in 1946, sent more than twice as much as any other single country. To offset this, there was a severe drop from 180,617 cwt. to 29,843 cwt. in Canadian shipments to the United Kingdom of dried eggs. Larger supplies from the United States, however, resulted in a better over-all stock position than in 1945.

Condensed milk (unsweetened) imports last year of 1,725,435 cwt. were more than 40 per cent greater than in 1945. While the United States contributed the bulk of this amount, Canada re-entered the trade substantially with 255,826 cwt. A similar tendency affected imports of milk powder, Canadian supplies increasing from 2,126 cwt. in 1945 to 44,581 cwt. last year out of the total of 743,694 cwt.

Increased Purchases of Fresh Fruits and Vegetables

The attempt to introduce variety into the diet is evident in the Ministry of Food's purchases of fresh fruits and vegetables, which were brought up from 9,169,171 cwt. in 1945 to 16,754,217 cwt. in 1946. The latter figure was, however, only about 40 per cent of the prewar level. Arrivals of apples from Canada were 1,278,558 cwt. against 252,831 cwt. in 1945.

Fish Imports Still Above Prewar Level

Having regard to the resumption of operations by the British fishing fleets, imports of fresh or frozen fish at 4,058,304 cwt. were surprisingly well maintained, as the relative 1938 figure was 1,635,382 cwt. Purchases from Canada of 66,555 cwt. were practically at prewar level and only a third of the 1945 quantity.

In canned salmon, the 1946 Canadian supply, 527,970 cwt., showed an increase over 1945 of 50 per cent. Total imports were 874,294 cwt. compared with 1,151,829 cwt. in 1938, but in that year the Japanese and Soviet Union packs, which are now absent, accounted for 696,740 cwt.

An interesting feature of the trade in canned tomatoes is the resumption of Italian shipments to the United Kingdom. Of the total imports of 456,408 cwt., no less than 220,482 cwt. came from Italy against 215,931 cwt. from Canada.

Purchases of Canadian Tobacco Have Fallen Off

As regards tobacco, the United Kingdom Control was able to secure an appreciably larger volume of imports in 1946, the total being 433,433,205 pounds against 369,149,619 pounds in 1945 and 346,145,683 pounds in 1938. The United States furnished the major portion of the increases, and consignments from Southern Rhodesia, India and Turkey also expanded. Before the war, Canadian tobacco was coming into increased favour in this country and it is, therefore, disappointing to report that, due to supply considerations, ground is being lost. In 1946, entries of Canadian tobacco aggregated 9,350,917 pounds, not much more than half the amount in 1938.

Concurrently with an over-all fall in asbestos imports from 66,732 tons in 1945 to 54,022 tons in 1946. Canada's share shrank from 32,426 tons to 23,403 tons. The same trend applied to copper ore, imports from Canada falling from 19,373 tons to 12,952 tons.

Canada Maintains U.K. Market for Lumber

In spite of difficulties, Canada has maintained surprisingly well her export market in the United Kingdom for lumber. Were it not for the consistency of Canadian supplies, the building program and other essential reconstruction projects would be in a more serious position. As it is, the shortage of wood forms one of the worst bottlenecks among raw materials.

Main Wood and Timber Imports

	1945		1946	
	Total	Canada	Total	Canada
Heven hardwood other than mahogany (1,000 cubic feet)	2,840	920	3,836	1,160
Sawn hardwood other than mahogany (1,000 cubic feet)	7,871	4,713	6,824	4,449
Softwood, sawn (standards)	729,071	363,625	707,050	333,397
Softwood, planed or dressed (standards)	56,617	30,427	36,635	19,516
Boxboards (standards)	27,278	17,497	20,841	4,819
Pitprops (piled cubic fathoms)	161,211	91,954	460,412	216,594
Sleepers (standards)	60,712	59,801	18,052	17,800
Veneers (cwt.)	275,045	185,753	336,968	195,964
Plywood (cubic feet)	8,394,220	3,451,225	7,772,009	2,997,838

A strong attempt which is being made to re-establish London as the leading European market for furs is reflected in the total imports of raw furskins undressed, which have risen from 19,110 cwt., valued at £3,369,381, to 39,021 cwt., valued at £9,717,174. Consignments from Canada were 4,284 cwt. (£2,681,093) in 1946 against 1,781 cwt. (£328,409) in the previous year.

Paper-making Materials Bought in Scandinavia

Heavier shipments of paper-making materials from Sweden and Finland enabled the United Kingdom to increase the total quantity brought in from abroad from 709,519 tons to 953,689 tons. Imports from Canada were, however, substantially cut. In dry, bleached, chemical pulp, receipts (19,514 tons) were less than a third those of 1945. In dry, unbleached, Canada sent 40,373 tons, less than half the 1945 quantity. In mechanical, wet pulp, Canadian deliveries sank to 19,348 tons from 34,796 tons in 1945. Mechanical, dry, imports were reduced to 174 tons from 23,300 tons.

There was also a reduction from 60,678 cwt. in 1945 to 23,925 cwt. in 1946, in imports from Canada of seeds for sowing. Total imports (475,953 cwt.) rose by some 40 per cent.

Entries from Canada of iron and steel and manufactures in 1946 (98,391 tons) were 50 per cent higher than in the previous year. Total imports (499,533 tons) increased in about the same ratio.

Aluminum Purchases from Canada Greatly Increased

A striking advance took place in purchases from Canada of aluminum in ingots, blocks, billets, etc., 1,801,765 cwt. valued at £6,886,526. This was more than four times the 1945 quantity.

In cobalt and cobalt alloys, consignments from the Dominion fell to 492,860 pounds against 532,778 pounds in 1945.

Copper (electrolytic unwrought) is another item in which Canadian shipments made a noticeable recovery. The amount credited to Canada was 60,415 tons, valued at £4,701,343, more than twice as much as in 1945. Total imports of 168,783 tons increased by some 80 per cent.

In 1945, no imports from Canada of copper rods, sections, etc., were recorded, although this was a substantial trade in 1938. In 1946, however, 132,413 cwt. were brought in. Total imports of unwrought lead in pigs, ingots, etc., 156,986 tons, were lower than in 1945 and imports from Canada dropped by about 27 per cent to 50,916 tons. Unwrought nickel inventories are being brought up again, receipts from Canada being registered at 75,754 cwt. against 3,143 cwt. in 1945. Arrivals from Canada of unwrought zinc or spelter fell by upwards of 50 per cent to 29,328 tons. Total imports of 54,934 tons were also heavily reduced.

Imports of Many Manufactured Items from Canada Reduced

In the group "cutlery, hardware, implements and instruments", the gross value of imports, amounting to £3,011,123, was less than half that of the previous year and Canada's share fell to £330,344 from £900,654. The value of imports of Canadian electrical goods and apparatus, £4,133,347, declined by 20 per cent in a total of £5,029,173, which was less than a third of the previous year's figure. As regards machinery, total imports were valued at £13,521,221, or about a third less than in 1945. The value credited to Canada was £971,281, a little less than half the previous year's result. United States supplies, £9,545,549, also fell sharply.

Rubber footwear imports remained steady, values of both total imports (£799,183) and of imports from Canada (£564,523) showing only small variations from 1945.

In chemicals, drugs, etc., the value of 1946 imports was £17,611,706, a contraction of some 10 per cent. The reduction in shipments from Canada was more marked, the value dropping from £4,195,079 in 1945 to £1,178,549 last year.

Expenditure on overseas leathers of all kinds was £10,023,408, more than twice that of 1945. Supplies from Canada rose by 60 per cent to £366,494.

Canadian Newsprint Purchased

Yet another fall in imports of newsprint paper was recorded in 1946, when the quantity was 2,090,725 cwt. against 3,722,741 cwt. in the previous year. The main cause was reduced deliveries from Newfoundland. Canadian supplies, however, declined by about 24 per cent to 1,146,884 cwt.

Kraft paper imports were increased by 30 per cent to 637,777 cwt., due entirely to larger consignments from Sweden and Finland. The amount credited to Canada, 97,029 cwt., was less than half that of 1945.

Cardboard and pulpboard imports shrank by some 20 per cent to 880,429 cwt. Canada's share fell by about the same proportion to 356,624 cwt.

Canadian shipments of kraftboard in reels, however, were more than double, at 215,268 cwt. Total imports were practically, unchanged.

In the vehicles group, the only item in which Canadian figures are separately recorded is rubber tires and tubes, and this trade practically disappeared, the number brought in from Canada being only 17, against 94,862 in 1945. Total imports were heavily slashed.

Exports Increase But Difficulties Expected

A general survey of United Kingdom exports for 1946 shows that the volume continued to increase, and by the end of the year, the 1938 level had been reached.

The quantitative index for last year was estimated at 84 per cent of 1938 in the first quarter; 98 per cent for the June quarter; 104 per cent for the September quarter; and 112 per cent for the last quarter. The pace of the increase tended to slacken in the latter months of the year, and at this critical stage, such a trend has given rise to a certain amount of anxiety. This unfortunate development is attributed partly to shortages of coal and raw materials and official spokesmen have already forecast difficulties in 1947 in basic industries like coal, steel and textiles. Two of the most important prewar exporting industries, cotton and coal, are still contributing little to export trade recovery. Before the war, Britain exported 35,856,000 tons of coal a year. Last year, coal exports totalled 4,454,000 tons, a quarter of which went to Eire. Cotton yarn exports were only a sixth those of 1938 and piece-goods only a third.

British Exports to Canada

As might be expected, increases have taken place in most items, but it is generally agreed that they are insufficient from the point of view of achieving a greater measure of equilibrium in the balance of payments with the hard currency areas.

Exports of Principal Items with Relation to Canada

	1945		1946	
	Total	Canada	Total	Canada
Beverages and cocoa preparations.....	£15,183,488	£ 735,216	£17,209,454	£ 956,454
Coal	6,640,929	37,001	9,060,730	206,296
Pottery, glass abrasives, etc.	13,011,434	1,810,151	27,625,167	2,624,796
Iron and steel and manufactures.....	20,880,610	318,139	80,047,156	706,327
Non-ferrous metals and manufactures....	12,127,921	2,125,391	37,661,875	1,612,737
Cutlery, hardware, implements and instruments	10,033,946	363,381	26,961,297	708,409
Electrical goods and apparatus	13,801,477	452,169	37,391,502	252,615
Machinery	47,099,363	749,996	113,799,631	2,041,195
Cotton yarns, grey, unbleached	2,194,631	832,163	3,090,591	1,001,668
Cotton yarns, bleached and dyed	721,225	107,641	700,111	67,661
Woven piece-goods (cotton)	28,778,816	628,142	40,357,916	461,499
Woollen and worsted yarns and manufactures	21,559,307	5,125,665	43,595,311	7,498,519
Silk and artificial silk yarns and manufactures	17,282,223	1,428,669	27,308,433	1,798,126
Other textile materials	7,098,971	912,993	21,797,393	2,050,842
Apparel	11,160,270	333,730	30,452,757	1,193,450
Footwear	1,212,675	8,435	4,908,343	93,117
Chemicals, drugs, dyes and colours.....	38,233,589	967,340	66,055,909	1,237,030
Leather and manufactures	1,792,091	251,456	6,041,575	436,621
Paper, cardboard, etc.	5,149,910	116,488	14,399,491	226,391
Vehicles (including locomotives, ships and aircraft)	19,105,771	895,804	113,513,725	1,684,238
Printed books	2,366,455	115,348	3,875,073	176,549

Scottish Industry Flourishing Despite Shortage of Labour

Ship launchings in 1946 totalled nearly 400,000 gross tons—Heavy orders on hand for locomotives, marine engines and power plants—Demand for iron and steel exceeds productive capacity—Woollen goods and carpets in great demand—Serious shortage of paper, particularly newsprint.

By G. B. Johnson, Canadian Trade Commissioner

GLASGOW, February 10, 1947.—Clyde shipyards launched 90 vessels of 343,000 gross tons during 1946, or 86,000 tons more than in 1945. The shipyards on the East Coast of Scotland—at Dundee, Burntisland, Leith and Grangemouth—put into the water a tonnage of over 55,000. These figures compare favourably with the launchings in the years immediately before the war. The marine engineering works in all these areas were correspondingly busy. The new ships are intended to replace those lost by enemy action during the war, most of which were under 10,000 tons gross. Many Scottish shipbuilders have work on hand to keep them busy for two years or more but are faced with the problem of obtaining sufficient quantities of shipbuilding materials of all kinds.

Gas Turbine Engine May be Adopted

The development of the gas turbine engine for marine propulsion is now engaging the attention of several Clyde engineering firms, who are carrying out experimental work. It is stated that the use of this type will effect a saving of space by the elimination of boilers and economic operations on heavy oil.

In December the British Board of Trade announced that the Rolls-Royce Company will continue to operate at Hillington, the industrial estate just outside Glasgow. They will manufacture engine parts and will repair and service Rolls-Royce piston-type aero engines, employing about 4,000. During the war years this firm employed over 25,000 men and women in the manufacture of Merlin engines for aircraft.

Hydro-electric Project Under Construction

The North of Scotland hydro-electric project, under the direction of the North of Scotland Hydro-Electric Board, is an important undertaking to supply electric power and facilities to the Highlands. It received the approval of Parliament some time ago and is now under construction. The expected revenue from the Highlands alone would entail a heavy loss in working costs. To obviate this, it is the intention to direct surplus current into the existing electricity "grid" of south and central Scotland and, if need be, to England. The project should be partly in operation in 1948, but three or four years will probably be required to complete the whole of the approved plans, the largest scheme of which is at Pitlochry, in Perthshire, where three power stations are being erected with a combined capacity of 153,000 kilowatts. Now furthest advanced is the £4,000,000 project harnessing the waters of Loch Sloy, which will have a capacity of 140,000 kilowatts. At Loch Shin, the first hydro-electric development in Sutherlandshire, the output is estimated at 140,000,000 units a year,



One of Germany's pocket battleships, the *Desflinger*, slowly approaches the shipbreakers, keel upwards, in the Gareloch, a sea loch of the Clyde estuary. The 32,000-ton floating drydock in the foreground was acquired by Metal Industries, Limited, which has taken over the wartime port of Faslane, as a base for marine salvage, towage and shipbreaking operations. It is expected that the Scottish steel industry, and indirectly shipbuilding, will benefit substantially from materials salvaged. H.M.S. *Iron Duke*, Admiral Sir John Jellicoe's flagship in the first world war, was the first ship to be demolished at Faslane.

Photo by Leddy & Glen

the catchment area being about 250 square miles. A head of about 250 feet will be available for a power station to be built at Invershin. From the Lednock-Earn scheme, the output is estimated at about 58,000,000 units a year, and for a power station at St. Filians, near Loch Earn, there will be a head of 750 feet.

Large Orders for Locomotives

It is announced that the North British Locomotive Company Limited, of Glasgow, has recently received orders for twenty locomotives for the Argentine Railways, 150 for the London and North Eastern, and 150 for the South African Railways. Full employment is assured for a considerable time with these and other orders already in hand.

Scottish manufacturers of marine engines and power plants have booked a great many new orders. The amount of work in hand for the building of new power plants and the rehabilitation and expansion of older ones is reported to be unprecedented. A large number of the orders for power plants are from overseas, but the domestic contracts are also heavy. The makers of sugar machinery and tea-drying machinery are also busy and are assured, with the orders already on their books, of continuous employment for many months, if not years.

Demand for Iron and Steel Exceeds Output

For some time past the demand for iron and steel has been beyond the capacity of manufacturers to supply. Towards the end of 1946 a

strike of bricklayers employed on the maintenance of smelting furnaces resulted in a loss of production, and supplies of steel ship plates and sections for the shipbuilders have not yet caught up with demand. Sheet-makers and re-rollers are well supplied with orders and, while output is high, the demand can not be fully met. There is great pressure for the delivery of structural steel, especially for the construction of factory buildings on industrial estates now being established or extended in Scotland. In the iron trade the light castings industry is fully employed in producing house-building and household goods.

Woollen Industry Operating at Capacity

The Scottish tweed mills in the border towns of Galashiels, Hawick and Peebles, etc., continue to operate at full capacity. Prospects for the future are reported to be excellent, as there is a world shortage of goods for which the district is noted. Here again, however, there is a shortage of labour, which is causing the manufacturers some apprehension. There has been a slight increase in the allocation for export markets.

Labour Shortage Affects Output of Linen and Jute Goods

The demand for both linen and jute goods continues to be greatly in excess of production. The main problem is shortage of labour. There is at present an adequate supply of raw flax for linen manufacture but, if all the machinery in the linen mills came into operation, there would undoubtedly be a shortage of raw material. Russian flax was largely used in this country before the war, but none can now be obtained from that source, and apparently the growing of flax fibre in this country is falling off.

There is likelihood of a sharp rise in prices of all kinds of jute yarns and jute cloth at an early date as a result of the removal by the Indian Government of the restrictions on export prices of raw jute.

Heavy Demand for Carpets

The demand for carpets continues unabated and, although production is gradually expanding in the carpet-making centres such as Glasgow (the location of the largest carpet-making plant in Great Britain) and Ayrshire, etc., there is still a great shortage of labour and certain raw materials. Delivery of new machinery for reconstruction is also slow.

Serious Shortage of Newsprint

Paper-making, one of the chief Scottish industries, is active in many areas, although there are possibly more paper mills within twenty miles of Edinburgh, esparto mills at least, than elsewhere in Great Britain. Esparto grass from North Africa is used for making high-quality papers; approximately 75 per cent of the esparto papers made in Great Britain comes from Scotland.

There is, and has been for some years, a serious shortage of paper in this country, which, in the case of newsprint, is apparent from the sizes of the daily newspapers. Demand for paper of all kinds is far in excess of production, and prospects for any great improvement in supplies, both for home and export markets, in the near future are not bright. The deciding factor is the raw-material position. Since the close of the war, some supplies of esparto have come forward, but the paper control has requested that this quality of pulp be reserved for paper to fill export orders. Supplies of wood-pulp are much less than requirements.

Whisky Stocks Declining

The Minister of Food recently announced that it would not be possible to release cereals for distilling purposes, which will prevent an early resumption of distilling. There is a steady decline in stocks in bonded warehouses throughout the country. It is reported that, unless distilling is resumed at an early date, there is every indication that the allocation of whisky for the home and export markets, small as it is, will not be maintained.

Docking Facilities to be Improved

The Clyde Navigation Trust has approved a reconstruction program to a value of £6,275,000 (about \$25,000,000) to make Queen's Dock, Glasgow, suitable for berthing ocean-going ships. It is estimated that this ambitious scheme will take eight years to complete and will provide up-to-date shipping facilities in the heart of the city. In its new form, Queen's Dock will accommodate ships up to 500 feet in length at berthage greater than that available at the George V Dock.

Commodious sheds and a greatly improved railway system for the dock will be provided, and the thirteen ocean berths will have a draught of 32 feet at low water as compared with the present 18 to 20 feet. Among many other improvements to be effected by the scheme will be the development of the river channel where it is joined by Prince's Dock and Queen's Dock, and the merging of Queen's Dock with Yorkhill Quay, which is used by liners operating on the North Atlantic route.

New Railroad to be Constructed in Mexico

Mexico City, February 13, 1947.—(FTS)—Two hundred million pesos, or about forty million Canadian dollars, are being invested in a new railroad connecting the southern Mexican State of Oaxaca with the Guatemalan frontier. The company which has obtained the concession for this development is the Cía. Mercantil, Industrial y Constructora, S. A., whose concession, granted by the Federal Government, provides for the construction and operation of a railroad in the States of Oaxaca and Chiapas.

Government co-operation in the planning of the exact route was announced this week when the Secretary of National Defence instructed the military authorities of Oaxaca to place all necessary equipment at the disposal of railroad officials and technicians, who will immediately start to plan the railroad starting from Matias Romero, Oaxaca, to Santa Maria Chilapa and through the valleys of Citalapa, Jiquipilas, La Fraislesca and La Concordia, then paralleling the river Grijalva, to Zapulota and Comitán, in Chiapas.

The railroad will traverse a large agricultural and lumber area and will open communications to Mexican gulf ports and the centre of Mexico, as well as provide a new means of communication with the Guatemalan frontier.

So far as can be ascertained, orders for rolling stock and general equipment for the new railroad will be placed in the immediate future. Construction may not be completed in less than two to three years, since the line will cross the Sierra Madre Mountain range and pass through jungle and mountain country.

State Enterprises in Yugoslavia Control Exports and Imports

Responsible for movement of commodities to and from country—Correspondence concerned with development of commercial relations with the various enterprises by Canadian exporters and importers should be addressed to Canadian Commercial Representative in Rome.

By J. P. Manion, Canadian Commercial Representative in Italy

(Editor's Note—The Yugoslav People's Assembly passed a law on December 4, 1946, nationalizing private economic enterprises deemed to be of national or state importance in 42 industries. Among the types of industries affected are mining, petroleum, transportation, communications, electric power, food, banks, insurance, textiles and wholesale trade.)

ROME, January 31, 1947.—State enterprises are presently responsible for the movement of commodities to and from Yugoslavia, for which reason it is recommended that Canadian exporters and importers should address their offers and requests for materials to the Canadian Commercial Representative in Rome, who is also responsible for the provision of assistance to firms trading with Yugoslavia. By centralizing correspondence concerned with the development of commercial relations with the various state enterprises, it is expected that greater advantages will accrue to the Canadian firms concerned than if they were to embark on individual transactions.

Although free enterprise is not excluded in principle from the foreign trade structure being established by the Yugoslav authorities, certain state enterprises only are for the moment competent to deal with foreign trade inquiries, operating under the Ministry of Foreign Trade (Ministarstva Spoljne Trgovine, Beograd). The following information concerning existing state enterprises, contained in the October 19, 1946, and December 7, 1946, issues of the *Board of Trade Journal*, has been adapted to requirements of the Canadian market.

Tehnopromet (Preduzece za uvoz i izvos metalnih i tehnickih proizvoda—enterprise for the import and export of metal and technical products), 35 Decanska ulica, Beograd. In charge of: steel and copper wire; railway equipment; pipes and tubes; nails; screws; small craft, tugs, motor boats, tankers; locomotives, railway wagons, cranes, lifts, chains; firearms and ammunition; ball-bearings; wire gauzes; dairy equipment; incubators; measuring, pressure, weighing and temperature apparatus; sanitary equipment; metal furniture; charcoal irons; technical goods made of gum, rubber, leather, textiles; industrial chinaware.

Hempro (Savezno preduzece za promet hemijskim proizvodima—federal enterprise for trade in chemical products), Francuska ulica 9/11, Beograd. In charge of: paints; stationery, office equipment and accessories; non-edible animal and vegetable oils and greases; mineral and aniline colours and dyes; printing colours; varnishes and lacquers; artificial fertilizers; salts, except edible; acetic acid; tar and pitch; photographic material, including films and paper; raw gum.

Koteks (Preduzece za uvoz i izvoz poljoprivrednih strojeva, orudga i sredstava za poljoprivredny proizvodnju—state enterprise for trade in leather and textiles), Ulica 7 Jula, No. 9, Beograd. In charge of: raw materials for textiles, leather and their associated industries; yarns and threads; silk cocoons and raw silk; artificial textiles and leather materials; waste material; special equipment for textile industry, e.g., needles, combs, cards, shuttles.

Poljostroj (Preduzece za izvoz tehnickog irveta—state enterprise for the import and export of agricultural machinery, tools and means for agricultural production), Zeljeznicka ulica 96, Novi Sad. Foreign trade functions have been transferred to "Thenopromet".

Jugodrvo (Preduzece za izvoz tehnickog drveta—state enterprise for the export of timber, timber and cement products), Dositjeva 6, Beograd. In charge of: firewood, charcoal; common stone, dressed or polished, marble, plaster, limestone, artificial slate, gypsum, "hemolite" and "salonyte"; dry distillation products.

Jugolek (Preduzece za uvoz i izvoz lekova—federal enterprise for the import and export of medicines), Dositejeva 7, Beograd. In charge of: artificial teeth, optical glass; medicinal oils. Empowered to sell imported goods to recognized enterprises and institutions. Under the control of the Committee for the Protection of Public Health. In agreement with the Ministry of Industry and "Hempro", has formed a laboratory section to control the distribution of laboratory chemical and apparatus. Supply centres have been established in Belgrade and Zagreb. Belgrade will be responsible for Serbia, Macedonia and Montenegro and Zagreb for Croatia, Slovenia and Bosnia and Herzegovina.

Jugometal (Preduzece za uvoz i izvoz ruda i metala—enterprise for the import and export of ore and metal), Obilicev Vanac 27/1, Belgrade. In charge of: export and import of minerals, metals, ores, concentrates, alloys, slag, quartz, etc.; all forms of mining equipment, machinery and material, including safety lamps, explosives, etc.

Centrotekstil (Preduzece za izvoz i uvoz gotove tekstilne robe—state enterprise for the export and import of ready-made clothes), Pariska ulica 13, Beograd. In charge of: men's and women's hats, scarves, etc.; knitted wear; bags; tents; lacework; carpets; textile piecegoods, ribbons, raincoats, footwear; cables, ropes and string; export of peasant handicrafts, including filigree jewellery; cigarette boxes, etc.; woodwork.

Vocar d.d. (Preduzece za voce i zadravani Savos—fruit enterprise and co-operative union), Terazije 35, Beograd. In charge of: purchase, sale and processing of fruit and vegetables; export of dry and fresh fruits; pulps and other fruit preparations; vegetables; import and export of alcoholic beverages.

Jugoauto (Preduzece za nabavku i prodaju motornih vozila i vatrogasnih Sprava—state enterprise for the supply and sale of motor vehicles and fire-fighting apparatus), Rankeova 4, Beograd. In charge of: tractors and agricultural machinery; bicycles; aeroplanes; navigating apparatus, radar equipment, aviation signalling apparatus; airfield installations; vulcanizing equipment.

Jugopetrol (Petrolejaka Preduzece—state petrol enterprise), Terezije 10, Beograd. In charge of: vegetable oils used for lubricating purposes or blending with mineral oils.

Uvozno Filmako Preduzece za Uvoz, Izvoz i Raspodelu Filova—(import film enterprise for the import, export and distribution of films), Knez Mohailova 19/IV, Beograd.

Jugoslovenska Enjiga (Drzavno preduzece "Jugoslovenska Enjiga"—state enterprise "Jugoslav-Book"—Yugoslav bookshop), 36 Moskovska ulion, Beograd. In charge of: distribution of Yugoslav publications at home and abroad; import of foreign publications, music, gramophone records, newspapers; empowered to establish offices abroad in major cities"; about to open offices in Prague and Tirana.

Centroprom (Contralno Prometno a.d.—Central Trade Limited), Decanska 35, Beograd. In charge of: purchase and sale, import and export of such goods as authorized by the Minister of Commerce. At present these include all grains and their products (flour, spaghetti, etc.); grocers' goods; alcohol; industrial herbs; hops; beets; chicory; animal foodstuffs; esparta and raffia; sugar; beans; peas; potatoes; onions; soya beans, etc.; seeds; all industrial and oil crops except medicinal herbs; hay and straw; coffee; tea; cocoa; spices; ground paprika; maize syrup; starch; molasses; yeast; dextrose; sweets, pastes, biscuits, etc.; incense, gum arabic; canes, reeds, seaweeds, basket-making material; feathers, animal casings, bones, and other animal parts; paper (including cigarette paper), paper bags and paper waste; cellulose; edible oils; oil-seed cake; alcoholic drinks and mineral waters; butter, cheese, etc.; livestock (horses, cattle, poultry, etc.); fresh dried and preserved meat and meat products, including grease and lard, eggs, honey and beeswax; fresh and dried fish, shell fish, game; tobacco and salt; all varieties of glass except medicinal and optical glass. Has branches in Vienna and Prague.

Na-Ma (Trgovacko Preduzece "Marodni Magazin"—state trading enterprise "National Stores"), Knez Mihailova 5, Beograd. In charge of: distribution, sale and import of goods for domestic consumption, e.g., china-ware, cutlery, stoves, bicycles, umbrellas, etc., including mineral waters and alcoholic beverages; linoleum; cameras; razors; trunks; suitcases; brushes; combs; brooms; buttons; tablecloths; pins and needles; scissors; sieves and kitchen utensils; ornaments and cheap jewellery; prams; toys; sports equipment; skates and roller-skates.

Jugoelektro (a new state enterprise), Knez Mihailova 24, Beograd. In charge of: import and export of electrical machinery and installations, and electrical material of all kinds, including wireless, telephones and light bulbs.

Putnik (Drustvo za savbracaj putnika in turista a.d.—company for traveller and tourist traffic), Ulica Rektova Dragoslava Jovanovica 1, Beograd (and twenty branches). In charge of: state travel agency; booking agents for state air lines; Yugoslav steamships; Yugoslav state railways; responsible for main hotels throughout the country.

Drzavna Preduzece "Iavna i Slobodna Carinska Skladista (state enterprise "Public and Free Customs Warehouse"), Split. In charge of all Yugoslav ports.

Otpremmo Preduzece (state forwarding enterprise), Beograd.

Zavod za Osiguranje i Reosiguranje F.N.R.J. (state institute for insurance and re-insurance), Beograd.

Australian Boot and Shoe Industry Steadily Increases Production

Output of boots and shoes increased from 13,954,154 pair in 1939 to 16,649,296 pair in 1945—Production of slippers declined from 8,169,498 pair to 5,814,819 pair in same period—Small trade in rubber-soled canvas shoes to be resumed by Canadian exporters when controls removed—Possible market for Canadian sporting footwear.

By F. W. Fraser, Commercial Secretary for Canada

MELBOURNE, January 31, 1947.—Between the period June 30, 1939, to June 30, 1945, Australian shoe factories increased their output of boots and shoes from 13,954,154 pair, valued at £A6,887,903, to 16,649,296 pair, valued at £A11,022,086, while the production of slippers dropped from 8,169,498 pair, valued at £A924,021, to 5,814,819 pair, valued at £A1,007,748. During the same period, imports of boots, shoes and slippers fell from a value of £A232,436 to £A30,888. Of this latter amount, £A19,862 consisted of semi-manufactured items such as slipper forms, etc., leaving only £A11,026 to cover all types of fully manufactured boots, shoes, slippers, goloshes, sand shoes, etc., imported, about one-tenth of one per cent of the value of domestic production. Exports rose from £A22,951, in 1938-39, to £A61,899, in 1944-45. While it must be admitted that the decline in the value of imports is attributable to the restrictions imposed as a war measure, the fact remains that, even before the war, imports accounted for less than two per cent of the total consumption.

According to figures released by the Commonwealth Department of Information, the Australian industry supplied 14,600,000 pairs of boots and shoes to the Allied Services from the beginning of the war to the end of 1944, approximately 20 per cent of the total production (exclusive of slippers) during that period. Little change occurred in the volume of civilian production throughout these years, but in order to cope with the greatly increased demand resulting from greater spending power, footwear was severely rationed. Design was limited by regulation.

Industry Has Grown With Population

The boot and shoe industry in Australia is not a development of recent years, nor, as in the case of some other industries, has it undergone any abnormal expansion as the result of warfare. Based on a well-established leather tanning industry, it has grown steadily with the growth in population. In 1904, when the population was just under 4,000,000, the production from 320 factories, employing 12,912 hands, totalled 8,477,185 pairs of boots and shoes and 666,410 pairs of slippers, or about $2\frac{1}{4}$ pairs per head of population. In 1939-40, when the population had increased to just over 7,000,000, the output of 320 factories (the same number as in 1904, but employing 18,587 hands) amounted to 14,900,808 pairs of boots and shoes and 8,169,498 pairs of slippers, or about $3\frac{1}{3}$ pairs per head of population.

Observers express the opinion that the industry, so far as capacity is concerned, is in a position to gain an increasing share of the markets for leather footwear in the adjacent Pacific Islands and in India. The existing

shortage of suitable leathers may make it difficult for full advantage to be taken of this opportunity in the immediate or early future. At present, boots and shoes are still subject to export control and export permits are being granted sparingly, in order to help meet the growing domestic demand which followed the removal of these articles from the list of rationed goods.

The boot and shoe industry is capable of taking care of the major portion of the country's requirements. It enjoys the protection of a substantial import tariff.

British and American Brands Produced on Royalty Basis

In recent years, arrangements have been made to produce a number of British and American brands on a royalty basis, the British or American owner of the brand supplying the models and lasts. This development was arrested during the war by government regulation which limited shoe designs to austerity models. With the easing of controls, production on this basis has been resumed and a number of these brands are appearing on the market.

The heavy demands on the leather industry during the war years, as well as the strong postwar export demand, have created an acute shortage of leathers suitable for shoemaking, with the result that, in an endeavour to ensure adequate supplies for domestic industry, leather is still kept under export control. Export permits are only being granted after home demands have been satisfied. Generally speaking, shoe stocks are said to be in fair supply in the cheap and medium grades, but there is a real shortage in better-quality footwear.

Imports of Restricted Nature

It may be concluded that Australia's requirements of imported footwear, assuming that the existing prohibition on imports from non-sterling sources is removed, will be of a restricted character, and confined largely to: high-grade men's and women's leather shoes designed to sell on style and quality rather than on a price basis; novelty lines of a type not produced locally; and possibly some cheaper types of shoes, slippers and sandals made to sell on a purely price basis.

Small Steady Demand for Advanced Canadian Styles

Before the war, Canada enjoyed a small trade in rubber-soled canvas shoes. It is thought that this business can be regained following the removal of import restrictions. There are six manufacturers of this type of shoe in Australia, but designs are restricted to a few standard patterns, and there is a small, but steady, demand for the more advanced Canadian styles. Other lines in which future business may be expected from outside sources would include riding and skating boots and other types of sporting footwear.

Coal Shortage Causing Concern in Netherlands

The Hague, February 21, 1947.—(FTS)—Coal, which has received much consideration in Great Britain, is causing concern in this country. The majority of Dutch households are without fuel, a situation that they have experienced for weeks. Places of amusement, schools and libraries have been closed on account of the shortage. Transportation services have been curtailed, and government offices are closed on Saturdays. Commercial concerns have been requested to take similar action, provided this does not interfere with essential production. Coal prices have risen to \$169.68 per ton.

Imports From Latin America Far Exceed Values in Prewar Years

Canadian purchases in 1946, amounting to \$125.6 million, were five times the average for 1935-39 — Venezuela headed the list, followed by Honduras and Mexico—Total imports for last year established all-time record—Balance of trade totalled \$411,886,445.

BANANAS, coffee, corn, cotton, fruit pulp, petroleum, pineapples, sugar, tomatoes, vegetable fibres, vegetable oils and wax were among the principal Canadian imports from Latin American countries during the past year. The value of total purchases in this group was \$125,600,000, which figure is 45 per cent higher than that for 1945, and five times the average imports for 1935-39. Venezuela heads the list with a value of \$26,900,000, the bulk of which consisted of crude petroleum. This product, with coffee, comprised the principal items obtained from Colombia. Honduras, which is second on the list, provided Canada with a large quantity of bananas. Raw cotton, tomatoes and vegetable fibres were purchased from Mexico, while Argentina sold vegetable oils and corn for consumption in this country. Brazil exported coffee, raw cotton and wax to Canada, and Cuba furnished sugar, fruit pulp and pineapples. The principal Latin American countries from which this Dominion imported a wide range of commodities during 1946 are as follows:

Canadian Imports from Latin America

	1946	1945	1939
Venezuela	\$26,885,874	\$17,267,303	\$ 1,943,103
Honduras	15,572,523	8,016,664	16,502
Mexico	14,609,938	13,508,165	479,150
Argentina	14,372,213	7,333,108	4,406,456
Brazil	14,018,295	7,600,758	1,111,291
Cuba	13,227,720	7,511,912	888,649
Colombia	9,708,416	11,678,076	5,437,078
Dominican Republic	7,126,682	6,200,829	16,011
Guatemala	2,927,588	1,778,955	163,698
Salvador	2,427,782	1,502,191	44,945
Costa Rica	1,546,452	593,755	124,471
Peru	847,308	148,588	601,224
Haiti	777,950	513,722	51,579
Uruguay	617,552	95,360	307,711
Chile	424,265	561,563	226,158
Paraguay	263,536	241,148	100,170
Ecuador	157,499	1,964,479	17,891
Panama	38,048	33,698	72,660
Bolivia	32,197	25,428	2,510
Nicaragua	29,125	610	315

All-time Import Record Established

Canadian imports during the past year established a new record, being valued at \$1,927,279,402. This figure is higher by \$168,381,205 than the previous peak, recorded in 1944. Even after deducting the value of military stores returned to this country, amounting to \$68,145,000, the 1946 total continues to lead the value of imports in any year. Despite this condition, Canada had a favourable balance of trade of \$411,886,445 at the close of the twelve-month period, as her domestic exports were valued at \$2,312,215,301 and her foreign exports at \$26,950,546. Canada's external trade in 1946 was valued at \$4,266,445,000, which compares with the previous peacetime peak of \$2,635,083,000, established in 1920, and with the all-time peak of \$5,241,997,000 in 1944. Net exports of non-monetary

gold, which are not included among the domestic exports, were valued at \$95,800,000. The trade of Canada for the twelve months ended December is set forth in the following tables, prepared by the Dominion Bureau of Statistics:

Trade of Canada for Twelve-month Period

	1935-39	1944	1945	1946
Imports	\$ 684,581,724	\$1,758,898,197	\$1,585,775,142	\$1,927,279,402
Domestic exports	884,535,867	3,439,953,165	3,218,330,353	2,312,215,301
Foreign exports	12,518,789	43,145,447	49,093,935	26,950,546
Total trade	1,581,636,378	5,241,996,809	4,853,199,430	4,266,445,249
Balance of trade..... +	212,472,932	+1,724,200,415	+1,081,649,146	+ 411,886,445
Net exports, gold	124,400,000	109,700,000	96,000,000	95,800,000
Duty collected	94,492,555	177,852,885	168,227,533	229,155,887

Imports from the United States headed the list, being valued at \$1,405.3 million. The United Kingdom was the next important source of supply, with a total value of \$141.3 million, which excludes military equipment and other Canadian goods returned to this country. The main items purchased by the Dominion from Great Britain were woollen fabrics and yarns, cotton fabrics, tin and tableware.

India Supplies Jute, Tea and Rugs

India led the list of other British Commonwealth countries exporting to Canada, with a total of \$27.9 million, consisting principally of jute fabrics, tea and rugs. Australia's shipments, mainly wool, raisins and rabbit skins, were valued at \$19.8 million. British Guiana was in fourth position among Empire exporters to Canada, with a value of \$12.2 million, mostly bauxite for the manufacture of aluminum and sugar. New Zealand was next in line, wool and sausage casings comprising much of the export value of \$12.0 million. Imports from Jamaica, valued at \$10.5 million, consisted principally of sugar, bananas and rum.

Percentage Increases in Commodity Groups

Gains were widely distributed throughout the list of commodities in 1946, with eight of the nine main groups recording substantial advances. The miscellaneous group, which had been heavily weighted by wartime needs, was the single exception. Imports of agricultural origin were up 31.5 per cent; animals and animal products, 37.8 per cent; fibres, textiles and textile products, 34.2 per cent; wood, wood products and paper, 40 per cent; iron and its products, 27.7 per cent; non-ferrous metals and their products, 21.3 per cent; non-metallic minerals and their products, 25.3 per cent; chemicals and allied products, 16.3 per cent; while the miscellaneous group was down 20 per cent.

With outstanding gains in farm and industrial machinery, automobiles and parts, the aggregate value of imports in the iron and its products group rose from \$384,460,000 in 1945, to \$491,069,000 in 1946. This group accounted for about 25 per cent of all imports in 1946. Gains in cotton, flax, hemp and jute, wool, and artificial silk were the features of the textile group, the aggregate value of which rose from \$196,761,000 in 1945 to \$264,121,000 in 1946.

Imports of agricultural and vegetable products were valued at \$310,753,000 in 1946 compared with \$235,558,000 in 1945. Imports of fruits, nuts, grains and products, edible vegetable oils, coffee, alcoholic beverages and rubber were up; tea imports were down.

Chiefly due to marked advances in the imports of paper and books and printed matter, the wood and paper products group rose from

\$49,761,000 to \$69,623,000. The non-ferrous metals group increased from \$99,120,000 to \$120,281,000, with substantial advances in aluminum, brass, precious metals and electrical apparatus. Coal and petroleum products accounted for a large share of an advance in the non-metallics group from \$265,405,000 to \$332,611,000. The chemicals group was up from \$79,759,000 to \$92,874,000.

Canadian Imports, by Commodities

Commodity	December		January-December	
	1945	1946	1945	1946
Thousands of Dollars				
Agricultural and Vegetable Products	23,107	29,470	235,558	310,753
Fruits	6,076	10,743	71,489	95,496
Fruits, fresh	6,305	5,742	61,338	69,587
Fruits, dried	149	2,694	7,127	13,921
Fruits, canned	164	220	1,812	3,911
Fruit juices and fruit syrups	57	1,817	1,213	8,077
Nuts	2,775	2,360	14,322	22,591
Vegetables	4,107	1,461	22,032	27,243
Vegetables, fresh	4,031	1,276	21,252	25,748
Vegetables, dried	12	19	91	456
Vegetables, canned	3	54	336	536
Pickles, sauces and catsups	61	112	352	503
Grains and products	1,915	3,732	12,507	20,197
Rice	448	299	2,576	1,798
Oils, vegetable, edible	37	130	644	2,591
Sugar and products	1,847	1,414	32,104	39,879
Sugar	1,485	1,109	28,950	32,416
Cocoa and chocolate	18	1,780	3,891	5,626
Coffee and chicory	981	406	9,156	16,162
Spices	39	107	880	1,302
Tea	537	666	17,729	10,208
Vegetable products, other, mainly food	380	633	2,636	3,464
Beverages, alcoholic	1,346	1,768	8,292	12,911
Ale, beer, porter, stout		4	37	12
Beverages, distilled	1,028	1,358	6,898	10,200
Wines	318	406	1,357	2,698
Gums and resins	209	829	3,931	5,635
Oil cake and oil cake meal	15	74	203	436
Oils, vegetables, not edible	585	1,187	10,836	12,471
Plants, shrubs, trees and vines	61	100	968	1,960
Rubber	696	1,148	15,098	20,079
Rubber, crude	89		6,872	5,994
Seeds	150	199	1,598	1,612
Tobacco	301	317	2,621	3,364
Vegetable products, other, not food	430	688	4,624	7,524
Animals and Animal Products	5,151	7,153	46,625	64,237
Animals, living	64	340	1,581	3,052
Bone, ivory and shell products	70	69	656	717
Feathers and quills	38	45	281	574
Fish and fishery products, n.o.p.	308	312	3,108	4,599
Fish, fresh and frozen	235	167	2,455	3,043
Fish, dried, salted, pickled, smoked	33	48	272	571
Fish, canned or preserved	3	40	74	363
Furs	3,054	1,966	21,205	27,292
Undressed furs	2,473	1,166	15,755	17,707
Hair and bristles	32	130	1,648	1,962
Hides and skins, raw	273	1,123	3,059	3,651
Leather, unmanufactured	281	571	3,510	4,182
Leather, manufactured	275	565	3,053	5,062
Meats	44	959	538	2,347
Milk and products	24	271	350	1,125
Animal oils, fats, greases and wax	497	372	3,801	4,685
Animal products, other	192	434	3,836	4,990
Fibres, Textiles and Textile Products	17,262	31,583	196,761	264,121
Cotton	9,200	17,192	89,405	119,158
Raw, and linters	4,961	6,272	40,195	44,397
Yarn	850	1,074	7,208	9,197
Fabrics	2,582	8,413	34,944	54,163
Flax, hemp and jute	577	1,430	17,829	23,142
Yarn	107	90	1,639	1,471
Fabrics, flax and hemp	159	201	1,118	2,588
Fabrics, jute	1	512	11,039	11,885

Canadian Imports, by Commodities—Continued

Commodity	December		January-December	
	1945	1946	1945	1946
Thousands of Dollars				
Fibres, Textiles and Textile Products—Con.				
Silk.....	159	684	2,089	4,041
Fabrics.....	153	489	2,043	3,394
Wool.....	4,070	6,388	43,719	64,568
Raw wool.....	695	2,153	12,327	18,707
Noils and tops.....	578	965	6,736	10,893
Yarn.....	172	437	6,109	6,109
Worsted and serges.....	950	1,019	8,212	11,924
Fabrics, other.....	651	724	5,982	8,191
Artificial silk.....	1,474	2,586	20,849	22,103
Yarn, twist and thread.....	707	862	11,950	9,520
Fabrics.....	708	1,222	8,410	9,833
Fibres and products, other.....	700	513	7,536	9,544
Mixed textile products.....	1,081	2,790	15,335	21,564
Wood, Wood Products and Paper.....	4,267	6,428	49,761	69,623
Wood, unmanufactured.....	420	879	6,457	8,586
Planks and boards.....	281	620	4,203	5,612
Wood, manufactured.....	634	1,257	8,483	11,467
Wood pulp.....	94	172	1,166	1,291
Paper.....	1,202	1,632	13,376	18,834
Books and printed matter.....	2,011	2,660	21,455	30,737
Iron and Its Products.....	26,777	49,003	384,460	491,069
Iron ore.....	94	535	8,596	6,467
Ferro-alloys.....	133	99	1,015	677
Pigs, ingots, blooms, billets.....	13	62	2,051	629
Scrap iron.....	44	241	818	2,163
Castings and forgings.....	527	763	8,186	7,445
Rolling mill products.....	4,110	4,696	55,049	53,376
Pipes, tubes and fittings.....	462	704	5,641	8,411
Wire.....	349	423	4,315	3,928
Chains.....	139	145	1,887	1,636
Engines and boilers.....	1,824	3,331	28,040	29,462
Farm implements and machinery.....	3,951	7,048	50,435	68,352
Hardware and cutlery.....	448	712	4,673	7,431
Machinery (except agricultural).....	7,203	13,069	92,781	130,287
Springs.....	28	16	518	785
Stamped and coated products.....	175	460	2,082	3,433
Tools.....	655	822	7,945	10,135
Vehicles, chiefly of iron.....	3,822	11,027	77,111	107,665
Automobiles, freight.....	69	752	1,940	6,493
Automobiles, passenger.....	224	3,438	2,937	25,209
Automobile parts.....	3,237	5,895	67,855	66,453
Iron products, other.....	2,800	4,852	33,318	48,785
Non-Ferrous Metals and Their Products.....	5,814	10,925	99,120	120,281
Aluminium.....	484	1,324	9,611	14,693
Brass.....	368	763	4,470	7,317
Copper.....	132	282	1,186	2,137
Lead.....	8	15	335	146
Nickel.....	148	339	1,481	3,527
Precious metals (except gold).....	311	1,295	5,281	13,897
Tin.....	91	110	5,122	6,109
Zinc.....	94	197	991	1,784
Alloys, n.o.p.....	72	143	802	1,046
Clocks and watches.....	617	743	7,333	7,808
Electrical apparatus.....	2,860	4,624	43,052	47,788
Radio and wireless apparatus.....	710	1,029	15,635	10,802
Gas apparatus.....	30	41	381	436
Printing materials.....	124	135	1,185	1,570
Non-ferrous metals, other.....	475	914	17,890	12,024
Non-Metallic Minerals and Their Products.....	20,630	27,828	265,405	332,611
Asbestos.....	189	209	2,214	2,230
Clay and products.....	1,436	1,511	13,681	17,824
Coal and products.....	9,488	10,101	115,194	133,083
Coal.....	8,343	9,434	102,432	120,354
Coke.....	936	604	11,369	10,888
Glass and glassware.....	1,319	2,084	16,098	23,258
Graphite.....	38	52	459	603
Mica and products.....	18	27	237	280
Petroleum products.....	6,414	11,743	95,056	123,743
Stone and products.....	613	933	9,888	14,676
Non-metallic minerals, other.....	1,113	1,168	12,579	16,914

Canadian Imports, by Commodities—Concluded

Commodity	December		January-December	
	1945	1946	1945	1946
Thousands of Dollars				
Chemicals and Allied Products	6,635	7,811	79,759	92,874
Acids.....	258	271	3,303	3,228
Alcohols, industrial.....	20	26	306	689
Cellulose products.....	445	501	5,330	6,554
Drugs and medicines.....	682	687	9,440	9,371
Dyeing and tanning materials.....	832	712	8,297	9,209
Explosives.....	44	66	923	848
Fertilizers.....	344	399	3,707	4,561
Paints and varnishes.....	723	869	8,660	9,437
Perfumery, cosmetics, toilet preparations....	21	74	402	721
Soap.....	106	51	405	962
Inorganic chemicals, n.o.p.....	990	930	11,270	12,564
Potash and compounds.....	43	68	679	635
Soda and compounds.....	330	479	3,698	5,260
Chemical products, other.....	2,169	3,226	27,714	34,731
Miscellaneous Commodities	11,549	11,707	228,327	181,710
Amusement and sporting goods.....	372	698	3,043	7,058
Brushes.....	38	84	387	750
Containers, n.o.p.....	186	244	1,623	2,283
Household and personal equipment, n.o.p....	1,063	1,739	8,431	18,605
Refrigerators and parts.....	226	494	663	5,201
Mineral and aerated waters.....	1	4	7	43
Musical instruments.....	118	380	953	3,361
Scientific and educational equipment.....	705	1,330	9,216	13,820
Ships and vessels.....	4	120	3,320	938
Vehicles, except iron.....	274	755	16,440	10,866
Aircraft (excluding engines).....	233	597	16,001	9,448
Paintings and other works of art.....	230	87	1,164	1,693
Miscellaneous commodities, other.....	8,557	6,265	183,742	122,294
Canadian Goods returned (¹).....	5,983	562	36,587	68,145
War Materials (Order-in-Council).....	200	3	88,954	2,911
Total Imports	121,192	181,913	1,585,775	1,927,279

(¹) Consists mainly of Canadian military equipment.

Large Shipment of New Zealand Butter Arrives

More than 2,240,000 pounds of New Zealand butter—enough to meet the weekly needs of nearly five million Canadians—was aboard the Canadian Pacific cargo liner *Beaverdell*, which arrived at Saint John recently from London.

Imported via Britain to maintain the present ration rate until the production season starts again late next spring, the butter will be sold to consumers at ceiling prices. Altogether five million pounds will be imported before the end of February under arrangements made by the Dominion Department of Agriculture with the British Ministry of Food.

National Sportsmen's Show to be Held in Ottawa

A National Sportsmen's Show is to be held in the Coliseum, Lansdowne Park, Ottawa, from April 21 to 26, at which the Canadian sports goods industry will exhibit small watercraft, outboard motors, fishing tackle and other types of sports equipment. A huge aluminum tank, 60 feet by 24 feet, is to be installed, and will be used for log rolling, canoe tilting, fly and plug casting events and other similar competitions. Efforts are being made to interest foreign countries in arranging exhibits of products indigenous to their respective countries.

Assistant Trade Commissio



A. P. Bissonnet, appointed Assistant Trade Commissioner on March 4, 1946, who will be leaving shortly for Rome. Born at Stanstead, Quebec, he received a Bachelor of Arts degree from Bishop's University. Enlisting in the army in September, 1942, as a lieutenant in the Royal Highlanders of Canada, he served overseas as a reinforcement officer to the Royal Hamilton Light Infantry. Wounded in action, he was stationed in England prior to his return to Canada in May, 1945.

V. L. Chapin, Assistant Trade Commissioner, who sailed this week from New York in the S.S. *Noordam* for The Hague. Born at Fort William, he graduated from the University of Ottawa with the degree of Bachelor of Arts in 1938. He was formerly employed by the American Can Company, Vancouver. Joining the army in December, 1941, he proceeded overseas in July, 1942. Wounded in action near Falaise, he returned to Canada in December, 1944. Prior to his retirement on March 12, 1946, he was registrar of the Board of Review, War Service Gratuities, with the rank of major. Mr. Chapin joined the Department of Trade and Commerce following his release from the army. He is married and has two sons.



J. P. Gauthier, appointed Assistant Trade Commissioner in February, 1946, who will be leaving shortly for London. Born in Montreal, he received his Bachelor of Arts degree from the University of Montreal. Joining the army as a Lieutenant, he served as Aide-de-Camp to General H. D. G. Crerar overseas. For two years, he acted as company commander in the Fusiliers Mont Royal. Later, for a period of four months, he acted as second-in-command of this regiment. He was returned to reserve status on October 5, 1945 with the rank of major. Mr. Gauthier is married.

Appointed to Six Countries

R. V. N. Gordon, appointed Assistant Trade Commissioner on June 8, 1946, who is proceeding to Jamaica in the near future. Born in Glace Bay, Nova Scotia, he graduated from Queen's University with the degree of Bachelor of Arts. For a year and a half he was associated with two meat-packing companies. He acted as cost accountant and purchasing agent for a furniture factory. Mr. Gordon was also employed by the Foreign Exchange Control Board and the Wartime Prices and Trade Board. Enlisting as an AC2 in the Royal Canadian Air Force in October, 1943, he served in Canada and Iceland. He retired in September, 1945, with the rank of flight sergeant.



W. J. Millyard, Assistant Trade Commissioner, who is leaving shortly for Mexico City. Born in Grimsby, Ontario, he graduated from the University of Toronto with the degree of Bachelor of Commerce. He subsequently received his C.A. from the Dominion Institute of Chartered Accountants. Enlisting in the Royal Canadian Naval Reserve on April 12, 1943, he trained at Halifax and served at sea until June, 1945. On his retirement from the navy with the rank of lieutenant in February, 1946, he was appointed to the Department of Trade and Commerce.

S. G. Tregaskes, appointed Assistant Trade Commissioner in May, 1946, who is proceeding to Cape Town. Born in Toronto, he graduated from the University of Toronto with the degree of Bachelor of Commerce. He was associated with a chartered accountant's firm in Toronto for 16 months prior to his enlistment in the navy in June, 1941, with the rank of sub-lieutenant. He served as cash officer in Halifax for 2½ years and was attached to an aircraft carrier for an additional 1½ years. After a tour of duty in the United Kingdom, he retired with the rank of lieutenant-commander. He is married.



Industries of New Zealand Show Signs of Expansion

Decentralization necessary due to scattered population and inadequate transportation facilities—Economic structure influenced by fact that country is predominantly agricultural—Domestic industry did not receive tariff protection until recent years—Little tendency towards industrialization until 1935 when protective measures taken by Government — Manufacturing industries greatly expanded since 1936—Industrial efficiency to be raised.

By M. R. Dale, Assistant Commercial Secretary for Canada

WELLINGTON, February 20, 1947.—The impact of a small scattered population and a rugged physical nature is reflected in the size of New Zealand firms. Transportation is slow and costly, also causing a trend towards decentralization. The combined forces of climate and available natural resources have limited the development of industry in New Zealand. It has remained predominantly an agricultural country, producing great quantities of meat, wool, butter, cheese, milk products and honey for export, and importing manufactured and semi-manufactured goods and raw materials.

The following table illustrates the great relative importance of agriculture compared with other industries.

	Value of production (million pounds)	Percentage
Agriculture (all forms)	72.5	63.5
Extractive industries:		
Mining	4.0
Forestry	3.0	6.5
Fisheries	0.4
Factory industries	23.2	20.3
Building construction and miscellaneous.....	11.1	9.7
Total	114.2	100.0

External Trade Reflects One Aspect of Economy

The picture of New Zealand's external trade in 1936 reflects another aspect of the same general economic structure. Agricultural produce accounted for 95 per cent of the total exports of £56.8 million, with dairy produce, wool and meat exports valued at £20.5 million, £13.3 million and £13.5 million respectively. Manufactured or semi-manufactured goods and raw materials (mainly metals, machinery, motor cars and textiles) represented 87 per cent of the total imports, valued at £44.3 million.

There is a general dispersion of manufacturing industries throughout the main urban centres of the country, and no tendency to localize in a given locality exists. There is also a dispersion of factories based upon agricultural raw materials, i.e., localized close to the source of supply. The factory industries of the Dominion mainly serve local needs; or have protection from foreign competition because freight charges are high in proportion to value; or are mainly based on such local raw materials as wools or wood; or are engaged in repairing or servicing machinery.

The occupations of the population reflect in a different way again the influence of the general factors which have determined the economic development of the country.

Distribution of Occupied Population at 1936 Census

	Number	Percentage
Agriculture	150,813}	25.5
Industries processing agricultural products	14,137}	
*Commerce and finance	99,866	15.4
Manufacturing industries	96,796	15.0
*Transport and communications	62,350	9.6
Public administration and professional	59,154	9.1
Personal and domestic service	56,745	8.8
*Building and construction	45,925	7.1
Extractive industries	24,300	3.8
Other and not specified	36,807	5.7
Total	646,893	100.0

*Size determined by the large volume of external trade.

Tariffs on British Goods Were Low

Tariffs have not, with certain exceptions, played an important part in industrial development, because for the most part they have been set at moderate levels with numerous exemptions and reductions in favour of British goods. In 1936, 53 per cent by value of British goods were admitted duty free, whilst 73 per cent of the imports were of British origin. The chief exceptions to this generalization appear to be clothing and footwear, textiles, woodware and certain articles of food, such as biscuits, and baking powder. Thus the chief factory industries were: Clothing and woollen textiles; baking and biscuit-making; printing; gas, water and electricity; boot and shoe-making and repairing; brewing; furniture, cabinet and sash and door-making; lime burning; brick-making; and ship repairing. At the same time the meat freezing, and butter and cheese-making industries process agricultural produce for export.

Little Increase in Industrialization Before War

During the decade 1926-36, the average increase in the whole occupied population was 17 per cent. The numbers engaged in agriculture increased by 25 per cent, in factory industries by 22 per cent, and in non-factory industries by only 7 per cent. Thus the Dominion, during this period, showed no marked tendency towards industrialization. The record was rather one of increased reliance upon agriculture and the few industries which were already well established catering for the production of immediately consumable goods and services.

The increasing social interdependence of the population of New Zealand is demonstrated by the increasing numbers in the wage and salary earning groups as shown below.

Economic Status of Occupied Persons at Each Census, 1911-1936

	1911 Per cent	1921 Per cent	1926 Per cent	1936 Per cent
Employers	10.3	10.0	9.4	9.1
Workers on own account	14.6	14.4	12.8	11.5
Wage and salary earners	66.9	73.2	75.4	77.3
Others (unpaid relatives assisting and not specified)	8.2	2.4	2.4	2.2
All classes	100.0	100.0	100.0	100.0

Dominion Hit Hard by Depression

The foregoing summary brings us to a turning point in the economic development of New Zealand. The Labour Government assumed office in 1935, when the country was just emerging from one of the worst depressions in its history. Thousands were unemployed and had to accept a small pittance of relief pay; large queues of hungry people outside soup kitchens and food-distributing centres were the order of the day; children in the cities were undernourished, poorly clad and accommodated in overcrowded rooms.

The Government reduced unemployment by a deliberate policy of public works and credit expansion. Wages were increased, hours of work shortened, and unemployment allowances and pensions were increased. These increases were reflected in an increase of retail prices of about 14 per cent over the 1935 level. Exports increased between 1935 and 1937 by £20 million (£67 million in 1937). Imports increased from £36 million in 1935 to £55 million in 1938.

Import Permit System Adopted

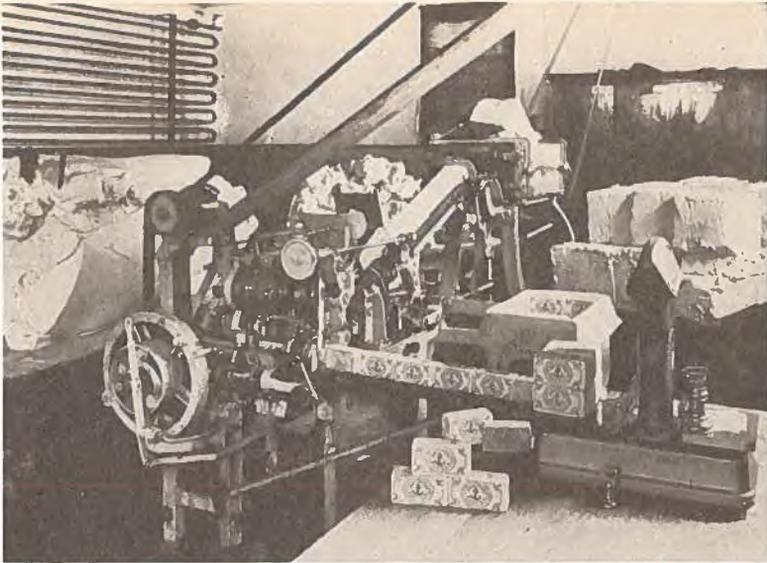
In 1938, the Government was forced to take action to protect the London funds of the Reserve Bank, because in that year exports fell to £58 million, while imports remained stable. There was also a flight of capital from the Dominion in anticipation of exchange depreciation. The overseas funds of the bank dropped to £5 million, compared with £25 million in 1936. Free dealings in foreign exchange were suspended, and a system was instituted of permitting imports only under licence. The policy generally was to ensure that, after overseas debt commitments had been met from the sterling funds, the maximum funds available would be provided for the importation of essential commodities, with particular regard to the needs of primary and industrial production in the Dominion. In the consideration of a licence, existing stocks and probable requirements were taken into account, and also the possibility of manufacturing in New Zealand goods which were formerly imported.

The mushroom growth of manufacturing industries in New Zealand since 1936 is the direct result of the Government's policy, and was accentuated by the scarcities of war years. High protection from overseas competition exists, even to the point of outright prohibition of imports where it is deemed possible to manufacture the goods in New Zealand. Until late 1939, the industrial expansion was mainly an expansion of the already existing industries.

The trend towards diversification of industry is illustrated by an examination of the percentage increase in the number of persons employed in the industries which comprise the Miscellaneous Group in 1942, as compared with 1939.

	Percentage increase in 1942 over 1939
Leather goods	133
Tanning	68
Paints and varnishes	40
Bags and sacks	36
Concentrated foods and essences	49
Fruit preserving and jam-making	37
Pellmongering	64
Paper bags and boxes	60
Brushes and brooms	37
Soaps and candles	42
Small machines and appliances	133

In addition, industries which have not more than two firms and cannot be listed in government publications, when grouped together gave employment to 1,017 persons in 1939 and to 2,452 in 1942.



Preparing butter for export in a New Zealand dairy plant. Recently a shipment of 2,240,000 pounds of New Zealand butter arrived at Saint John in order that the Canadian butter ration may be maintained. Altogether over five million pounds will be imported.

The system of allowing imports only under licence has had the result of encouraging foreign firms to set up establishments in New Zealand. There have always been a few factories which were owned and operated by overseas companies, chiefly British, but their number has increased greatly in recent years, and a number of American firms are now operating in New Zealand. Besides introducing new industrial processes and methods, this development has had repercussions on industrial relations, for these overseas firms have often brought with them new conceptions of industrial relations, standards of labour management and of factory welfare, and the resources to carry them out.

If one considers the number of factories in New Zealand and the small number of persons engaged in the factory industry, it is clear that the average size of the factory unit cannot be large.

Distribution of Factories According to Number of Persons Employed

Year	Factories employing			Total
	10 or less	11-50	51 or more	
Number of factories				
1936	3,836	1,373	327	5,536
1942	4,165	1,746	456	6,367
Number of persons employed				
1936	15,554	29,224	41,810	86,588
1942	17,238	37,924	62,052	117,214

For the purpose of New Zealand statistics, any workshop is considered a factory, and while the number of small factories is large, in 1942 they gave employment to less than one-half of the factory workers. In addition to the above table, the following helps to clarify the picture: in 1942, 210 factories employed 100 or more; 15 factories employed 500 or more; 2 factories employed 1,000 or more; no factories employed 2,000.

While the small size of New Zealand industry remains a dominating feature, there can be seen a definite tendency towards an increase in

the size of the unit. General economic prosperity since 1936 and the imposition of import restrictions have greatly assisted this expansion. New industries, free from competition and established under licence, under the Industrial Efficiency Act, have a monopoly market.

There has been a trend over a period of years towards a greater control of industry by the private company. A private limited liability company, with capital investment of about £10,000 and an employment capacity of about 20 workers, may be looked upon as the most typical form of industrial organization.

Efficiency of Industry to be Increased

Mechanization has taken place slowly, due to limited capital strength of New Zealand industries. The efficiency of industry is necessarily low, and the output per worker employed small, because small firms are mainly denied access to the internal economies of large-scale production. However, there will be an increased efficiency in production as the newly established factories, with new modern equipment and the "know how" of the older countries, develop.

The whole question of the efficiency of manufacturing industry has assumed great importance since the import restrictions were imposed in 1939. Any attempt to make the Dominion more self-sufficient in manufactured goods can only be achieved at the cost of stationery standards of living and of industrial unrest, unless the efficiency of industry can be increased to a very great extent. Hitherto, New Zealand has relied upon the great natural productivity of her soil and climate to give her a high standard of living, but her industries have few natural advantages compared with those overseas.

The problem of seasonal employment in New Zealand's agricultural industry is one which should be fully considered by anyone making a study of the whole economy. The picture presented by this examination of the general economic structure of New Zealand is one of a small, thinly populated country, broken up into regions between which transport is difficult and slow. Though about one-quarter of the population is engaged in agriculture or in processing agricultural produce for export, nearly two-thirds of the value of production is derived from their activity. Moreover, the predominance of agriculture produces considerable seasonal swings in employment. Industrial activity is mostly on a small scale, producing entirely for the home market and often for a local region within it, and is mainly in the hands of small independent employers working with a small capital of their own. Lately there has been a forced development of industry as part of a deliberate political policy. Its effects have been greatly to increase industrial activity and to increase to some extent the size of the industrial unit. This attempt at autarchy has been greatly helped by the war.

Export Permit Required for Fleshings

The export of fleshings, calf fleshings, cattle fleshings, fleshing stock, limed fleshings and sulphide fleshings is prohibited, effective March 3, except under Export Permit, the Export Permit Branch of the Department of Trade and Commerce announced on February 27.

French Production of Electricity Does Not Meet Total Needs

In 1939, output of electricity reached peak of 20·2 billion kwh., while during 1945, output was only 17·6 billion kwh.—Under "Monnet Plan", electrical consumption should total 39·5 billion kwh.—Large capital investments necessary—Lack of power necessitated rationing system being instituted—Companies producing less than 12 million kwh. nationalized—Electricity rates rise sharply.

By Yves Lamontagne, Commercial Secretary, Canadian Embassy

(Editor's Note—This is the second in a series of articles on economic conditions in France during 1946. The first appeared in the February 15th issue of *Foreign Trade*.)

PARIS, February 23, 1947.—The suspension of work on hydro-electrical projects during the war has resulted in a shortage of current which has been rendered more acute by the lack of rain since October last. This brought about a crisis which could only be met by drastic measures to reduce consumption. The decrease in the water level in the reservoirs to below the 50 per cent level resulted in an increase in the consumption of coal in the thermal power plants, the consumption of electricity rising far beyond expectations, reaching a peak of 78 million kwh. per day at the beginning of November, compared with 55 million kwh. a year previous.

Power Restrictions Put Into Effect

A plan was therefore put into effect on November 18, whereby current was cut off during twelve consecutive hours during the day, the measure applying to all industries (except certain high priority users), to commercial firms and to the general public. France was divided into several zones. Paris itself was divided into three districts, the current being cut off in each for two successive days from 7.30 a.m. to 7.30 p.m., and restored for domestic use only during meal hours (11.45 a.m. to 12.45 p.m., and 5.30 p.m. to 7.30 p.m.). This meant that industrial establishments would be supplied with electricity four days per week only. Arrangements were made, however, to increase the working day from 8 to 10 hours, the extra two hours being paid for at overtime rates, resulting in a 15 per cent increase in hourly wages.

When the restrictions were applied, there was an immediate decrease in consumption of electricity to 72 million kwh. on November 20, but it soon rose to 76 million, consumers having adapted themselves to the new regime.

Even with the hydro-electrical development to be undertaken during the near future, it appears that it will be necessary to impose restrictions until 1950 on consumption of electricity during the winter months, as demand will exceed supply for several years.

Certain Producers of Electricity Nationalized

Under a law dated April 18, 1946, the assets of all concerns in France, Algeria and the colonies, with the exception of companies producing less than 12 million kilowatts of electricity, were transferred to a national

organization known as "Electricité de France", a public industrial and commercial enterprise which is financially autonomous.

Rates Increased Sharply

Electricity rates were sharply increased as a result of the abolition during December last, of the subsidies on French coal. The economic index pertaining to electricity rates was fixed at 3.202 for low voltage and 2.008 for high voltage current as from January 1, 1947. The corresponding indices for the second quarter of 1946, before the rise in rates applied as from July 1, 1946, were respectively 2.137 and 1.273. The new coefficient of increase in rates is therefore 52.5 per cent. These new rates have been decreased to conform with the decree lowering the cost of goods and services by 5 per cent as from the beginning of 1947. Present rates in Paris are 8.46 francs per kw. and 5.48 francs for high voltage uses.

In 1939, the total annual output of electricity reached a peak of 20.2 billion kwh., of which 11.9 billion or 59 per cent was hydraulic and 8.3 billion or 41 per cent was produced from coal. During the following years production decreased steadily, and a low of 13.6 billion kwh. was reached in 1944, of which 60 per cent was hydraulic. During 1945 the output of electricity reached 17.6 billion kwh., of which 9.7 billion were hydraulic. The average consumption of coal in the thermal power plants in 1944 and 1945 was 751 grams per kwh. produced.

Substantial Increase in Electricity Production Required

Under the so-called "Monnet Plan" for the modernization of France's industry, consumption of electricity in 1951 should total 39.5 billion kwh. This would call for the construction of thermal and hydraulic plants which would provide for a peak daily consumption, in the month of December, of 144 million kwh. compared with 84 million and 66 million kwh. respectively in December, 1946 and 1938. This means that during the next five years present output (about 23.5 billion kwh. in 1946) should be increased by 16 billion kwh., of which 10 billion kwh. would be hydraulic. Between now and 1951 the annual capacity of the hydro-electric plants would require to be raised to 25 billion kwh. and that of the coal plants to 14.5 billion kwh. The plan aims at a production of 26 billion kwh. in 1947 (14 billion hydraulic) to be supplemented by imports of 1.3 billion kwh. (from Germany and Switzerland).

Large Additional Capital Investment Necessary

The program for the period 1947-50 would require investments on the basis of June, 1946, values, totalling 198 billion francs (\$1,650,000,000), including 72 billion francs for the construction of hydraulic power plants, 18 billion francs for transmission lines and transformers, and 80 billion francs for power-line distribution works. It is estimated that 3.5 billion francs worth of equipment would have to be imported, consisting largely of special material for the construction of hydro-electrical plants. During 1947, it is estimated that investments should total 42 billion francs, including 20 billions for buildings and public works and 22 billions for equipment and installation.

The estimated consumption requirements in 1951 are distributed as follows compared with 1938 (figures in parentheses), in million kwh.: low voltage, 7,200 (3,700); tractor, 2,300 (1,300); electro-chemical and metallurgical industries, 5,300 (3,600); siderurgy and metallurgy, 3,000 (1,700); mines, 3,600 (2,000); other high-voltage uses, 12,400 (5,900); losses in transmission, 5,700 (2,800); total production, 39,500 (21,000).

Foreign Trade Enquiries

Canadian firms interested in any enquiries listed in this section are requested to communicate directly with the companies or individuals concerned. As far as can be ascertained, they are in good standing, though the Foreign Trade Service cannot assume responsibility for business transactions undertaken with them. A copy of the initial reply from the enquirer should be forwarded to the Department of Trade and Commerce for follow-up purposes. Confidential information concerning the financial status of inquirers may be secured from this Department by bona fide Canadian manufacturers and exporters. In writing this Department in connection with enquiries, the name of the enquirer, file number of the enquiry and the date of issue of *Foreign Trade* in which it was shown should be supplied.

17. **Cuba**—Cia Antillana de Representaciones, Ave. 2a No. 3, Ampliacion de Almenardars, Havana, a highly regarded import firm, are desirous of obtaining an agency for Canadian drugs and pharmaceutical specialties. File: T.E. 186.

Postal Information

Normal Weight Limit for Air Mail to Philippines

Effective immediately, the normal weight limit of 4 pounds 6 ounces will apply to air mail for the Republic of the Philippines. All such correspondence should be prepaid at the air mail rate of 25 cents per quarter ounce.

Mail Service to Japan Extended

The territory of Japan to which mail for civilian addressees may be sent is extended to include the following islands: the four main Japanese islands of Hokkaido, Honshu, Kyushu and Shikoku; the adjacent islands, about 1,000 in number, including the Tsushima Islands; the Ryukyu (Nansei) Islands north of 30° north latitude (excluding Kuchinoshima); the Izu Islands; and the Nanto Islands north of and including Sofu Gan (Lot's Wife).

Mexico May Spend One Billion Dollars on Cheap Housing

Mexico City, February 25, 1947.—(FTS)—A ten-year plan to provide cheap housing throughout Mexico, at an estimated cost of five billion pesos (one billion Canadian dollars), has been announced through the official daily *El Nacional*, and the news may be of interest to Canadian exporters in that building materials are scarce in Mexico.

Some 100,000 new homes are expected to be built in the Federal District. Government action and private enterprise will be co-ordinated. The cheaper types of houses will be built with the assistance of various loan and savings societies. Home builders who have no savings will have access to a Fund for Cheap Housing, created by the Public Housing Act. Owners of building land will have the assistance of the Banco Nacional Hipotecario Urbano y Obras Públicas.

The whole scheme will remain under the management of Government authorities and the National Mortgage Bank, whose officials already have completed a series of discussions with the President of the Republic, the Secretary of Finance and the National Banking Commission.

To Proceed with Assuan Hydro-electric Scheme

Cairo, March 1, 1947.—(FTS)—A credit of ££10,500,000 for execution of the Assuan hydro-electric scheme has been approved by the Egyptian Cabinet, on the understanding that it would be temporarily drawn from the Reserve Fund until covered by an internal loan.

Market Opportunity Exists in Mexico For Canadian Paints and Varnishes

Value of domestic production increased from 1,356,800 pesos in 1930 to 10,878,167 pesos in 1945—Products unable to compete in quality with imported makes—Definite possibilities for emulsion paints.

By D. S. Cole, Commercial Counsellor, Canadian Embassy

Mexico City, February 12, 1947.—The manufacture of paints in Mexico dates back to 1890, but it was not until the termination of World War I that the technical improvements in the paint industry gave stimulus to Mexican firms to undertake the manufacture of paints in a serious way. Most of the plants then promoted were intended to compete with imported products, but as they failed to provide themselves with proper technical and plant equipment, it was found they were incapable of selling on a quality basis with the imported product. Nevertheless, from this time onward, Mexican paints found an expanding market in the low price field and where quality was not a consideration. This condition remains unchanged, although since the beginning of World War II, owing to shortages of supplies, the domestic industry has received a very considerable impetus.

Locally manufactured paints and varnishes cannot compete with products from the United States on a quality basis, and they can only be sold for the poorest of work. The practice of using inferior ingredients makes it possible, however, for some domestic producers to make profits very considerably higher than those which sell the imported product.

Imported Varnishes Are Cut Locally

By investigation in the trade it is found that many imported varnishes from the United States are brought into Mexico in concentrated form and are "cut" locally. The imported base is of very good quality and would give excellent results if the proper ingredients were used. Unfortunately, in Mexico the usual custom is to "cut" with impure materials and the product is very often ruined.

Domestic Oil Paints Are Cheap

The best oil paint produced in Mexico is termed "Albayalde", which is a mixture of lithopone and ground marble in oil in a ratio of 1 to 2. The extremely cheap product has no lasting value, but nevertheless receives very large sales owing to its low price. Very few oil paints as known in Canada are produced in Mexico, and these are inferior in quality to the imported product. There is, however, an excellent market for high-grade oil paints and there is a demand for both types.

Pyroxolin lacquers are used extensively in Mexico, principally by the automobile industry. The locally produced product is a very poor substitute for the imported product where a quality finish is desired.

Possibilities for Canadian Paints and Varnishes

It is estimated that imported paints account for approximately 55 per cent of the total consumption in Mexico. In 1945, the domestically produced paints sold more than in any previous year, despite the shortage

of materials. There is a market in Mexico for both the high-grade imported paints and the poorer quality, locally produced paints, the latter enjoying a heavy demand from the type of consumer to whom price is the exclusive factor. Canadian manufacturers interested in this market should be able to do an excellent business provided they can compete with the standard makes from the United States. The sale of emulsion paint, which is being increasingly used for the painting of walls, cement and plaster surfaces found in the majority of apartments and offices in the chief cities of this country, while not yet a large item, has definite possibilities.

Mexican Paint Industry, 1930-45

Year	No. of establishments	Raw materials consumed (Pesos)	Production (Pesos)	Personnel	Wages and salaries (Pesos)
1930	26	828,475	1,356,800	320	179,458
1935	22	1,097,200	1,961,997	365	293,288
1940	31	3,310,631	5,185,426	619	796,778
1945	52	Not available	10,878,167	701	1,578,400

Letters of One Ounce May be Sent to Japan

Effective immediately, letters not exceeding one ounce in weight will be accepted for transmission to Japan. Business communications of a non-transactional nature, limited to the ascertainment of facts and exchange of information, may also be mailed. The transmission of documents such as birth, death or marriage certificates, wills, legal notices, etc., is permitted. Letters and postcards may be written in English, Chinese, Japanese, French, Korean, Russian, Spanish or Portuguese. The enclosure of checks, drafts, securities, currency or other financial instruments is prohibited.

U.S. Commercial Corporation to Abandon Silk Auctions

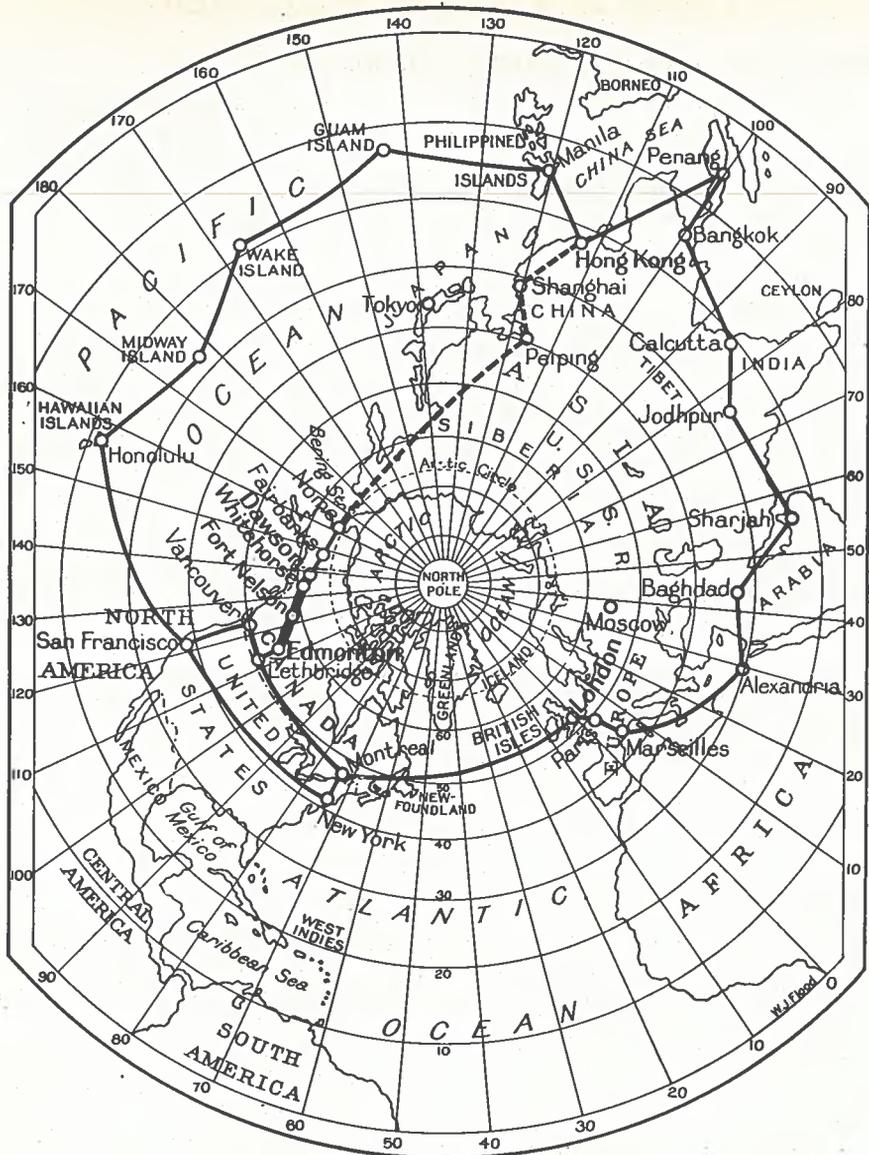
The United States Reconstruction Finance Corporation recently announced that its subsidiary, the United States Commercial Corporation, will abandon auction sales of Japanese raw silk in favour of fixed price sales at lower minimum prices. Minimum prices are based on the upset prices in effect at the last auction, held on February 7.

U.S.C.C. will guarantee to its purchasers minimum prices per pound for silk sold warehouse New York area on the basis of certificates as to weights and grades of the United States Testing Company, Incorporated, Hoboken, N.J., during the period from February 7 to August 1, 1947, as follows:

SP AAA	\$5 60	C	\$4 55
AAA	5 50	D	4 40
AA	5 00	E	4 25
A	4 85	F	4 1c
B	4 70	G	3 95

A minimum price of 15 cents per pound less than indicated in the foregoing schedule will be guaranteed during the same period for silk of the 16/16 and 21/23 denier classifications, as well as for silk sold on the basis of certificates as to weights and grades of the Japanese Government silk-conditioning house.

The U.S.C.C. also invite inquiries with respect to future deliveries of Japanese raw silk of deniers, other than those now available in the company's stocks, and indicate that reeling of special deniers can get under way about 60 days after acceptance of orders. The new sales program is intended to re-establish a broad market for silk and provide the smoothest transition possible to private trading when conditions in Japan permit.



Attention is directed this week to Canada's neighbour across the Arctic archipelago by the announcement that nine additional weather stations would be established over the roof of this country. These forecasting facilities will prove of "inestimable value to our national economy", it was indicated in the House of Commons, particularly to agriculture and lumbering, and to various forms of transportation. The most northerly station will be established on Ellesmere Island, within some six hundred miles of the North Pole, where Inspector Joy, of the R.C.M.P. maintained a lonely vigil for a number of years. This map, prepared by the Canadian Geographical Society, provides some indication of the relative positions of Canada and Russia. The heavy lines illustrate the principal prewar air route around the world, while the broken heavy line shows the shorter Great Circle course. Canada's exports to Russia during 1946 were valued at \$17,704,825, consisting principally of canned meat, wheat, canned herrings and donations and gifts, while her imports from Russia were valued at \$1,519,421, consisting principally of undressed Persian lamb fur skins, undressed squirrel skins, manufacturers of fur and crude muriate of potash.

Trade and Tariff Regulations

"Manifesto" Required by Ships Calling at Italian Ports

Ships calling at Italian ports will be required to carry a "manifesto", commencing in February, 1947. This document must be legalized by the representative of Italy in Canada, whose office is located at 384 Laurier Avenue East, Ottawa. The consular fee for legalization is \$9.85. Further information can be secured from the Italian representative.

Certain Products May Now be Imported Freely Into Jamaica

Kingston, January 31, 1947.—(FTS)—The following products can now be imported freely from Canada into Jamaica: oatmeal; pickles, sweet and sour; catsup, chili sauce and other sauces; glazed peel; chocolate bars; Jello preparations; dessert and pudding powders; cigarettes; gin and whisky; table potatoes; macaroni and vermicelli; dried eggs; and canned soups. While import permits are still required, any person or firm can obtain an import licence.

Firms Must Register to Sell to Mexican Government

Mexico City, February 18, 1947.—(FTS)—All foreign companies intending to sell, through their agents, to the Mexican Government must be registered with a new government Department of National Properties before March 17 next. This government decree was published here on February 16. No sales to the government will be considered, at least during the next twenty months, except from those manufacturers who are registered through their agents in Mexico.

Cement Imports Into Peru Free of Duties and Taxes

Lima, February 15, 1947.—(FTS)—According to a law passed by the Government of Peru, dated December 15, 1946, all imports of foreign cement into Peru will be free from all import duties and other taxes during a period of two years as from December 15, 1946.

The Peruvian Government has taken this measure in order to help the cement supply situation as, owing to the fact that increasing amounts are being produced locally, the output is not sufficient to cover the domestic demand.

A translation of the full text of the law is available in the Department of Trade and Commerce, if this is required by any interested parties.

Egyptian Trade Shows Increase

Cairo, February 21, 1947.—(FTS)—Details of the swelling flow of imports are given in the latest Egyptian trade returns. During the first eight months of 1946, the value of imports was E£15,009,347 higher than in the same period a year ago. Total imports until August 31 amounted to E£51,764,963. Exports showed an increase of E£5,666,114 in the same period, the total being E£41,428,414. Of the export total in 1946, cotton accounted for 164,531 tons valued at E£27,815,094, while tobacco and cigarettes imported were valued at E£4,551,128.



Ocean-Going Sailing Schedules

Information contained in the following list of sailings, such as destination, port of departure, loading date, name of ship and operator, is furnished by steamship companies and agents concerned. This is the latest available and subject to change after *Foreign Trade* has gone to press, particularly as this relates to the loading date and name of vessel. All ships are not as yet under the complete control of operators, and one or other may have to be withdrawn to fulfil a government demand for space. A substitute ship is normally provided, and the operator will immediately notify shippers of any change in the date of departure. If no substitute is available, operators will advise shippers of an alternative sailing by another line.

The loading date and name of ship are not indicated in some instances, due to the fact that on certain routes information available is not sufficiently definite to mention the steamer that will be placed on a berth for the destination shown. The name of the probable operator is given, however, and exporters should seek further particulars from the operator or agent indicated.

Departures from Montreal

Destination	Loading Date	Vessel	Operator or Agent
United Kingdom—			
Liverpool.....	May 14	<i>Beaverford</i>	Canadian Pacific
Liverpool.....	May 24	<i>Empress of Canada</i>	Canadian Pacific
Liverpool.....	May 24	<i>Beaverburn</i>	Canadian Pacific
London.....	April 27	<i>Beaverlake</i>	Canadian Pacific
London.....	May 23	<i>Beaverdell</i>	Canadian Pacific

Departures from Halifax

Destination	Loading Date	Vessel	Operator or Agent
Argentina—			
Buenos Aires.....	March 17-24	<i>Brazilian Prince</i>	Furness Withy
Buenos Aires.....	March 22	<i>John B. Hood</i>	Montreal Shipping
Australia—			
Fremantle.....	March 22	<i>Lowlander</i>	Montreal Australia New Zealand Line
Melbourne.....			
Brazil—			
Rio de Janeiro.....	March 17-24	<i>Brazilian Prince</i>	Furness Withy
Santos.....			
British Honduras—			
Belize.....	March 10-15	<i>A Ship</i>	Saguenay Terminals
Colombia—			
Barranquilla.....	March 10-15	<i>A Ship</i>	Saguenay Terminals
Costa Rica—			
Port Limon.....	March 10-15	<i>A Ship</i>	Saguenay Terminals
Curaçao.....	March 12-17	<i>Apollo</i>	Saguenay Terminals
Dominican Republic—			
Ciudad Trujillo.....	March 12-17	<i>Apollo</i>	Saguenay Terminals

Departures from Halifax—Continued

Destination	Loading Date	Vessel	Operator or Agent
Guatemala— Puerto Barrios.....	March 10-15	<i>A Ship</i>	Saguenay Terminals
Haiti— Port au Prince.....	March 12-17	<i>Apollo</i>	Saguenay Terminals
Newfoundland— St. John's.....	March 15	<i>Baccalieu</i>	Montreal Shipping
St. John's.....	March 18-21	<i>Fort Amherst</i>	Furness Withy
St. John's.....	March 25	<i>Blue Peter II</i>	Montreal Shipping
St. John's.....	April 1	<i>Baccalieu</i>	Montreal Shipping
Panama— Cristobal.....	March 10-15	<i>A Ship</i>	Saguenay Terminals
Scandinavia— Baltic Ports.....	March 29	<i>Svanholm</i>	Swedish American Line
United Kingdom— Liverpool.....	March 17-22	<i>Cavina</i>	Cunard White Star
Liverpool.....	April 12	<i>Jessmore</i>	Furness Withy
Southampton.....	March 19	<i>Aquitania</i>	Cunard White Star
Southampton.....	April 12	<i>Aquitania</i>	Cunard White Star
Uruguay— Montevideo.....	March 17-24	<i>Brazilian Prince</i>	Furness Withy
Montevideo.....	March 22	<i>John B. Hood</i>	Montreal Shipping
Venezuela— La Guaira.....	March 12-17	<i>Apollo</i>	Saguenay Terminals
West Indies— Antigua.....	March 7-12	<i>Canadian Challenger</i>	Canadian National
Antigua.....	March 7-17	<i>Alcoa Pilgrim</i>	Alcoa Steamships
Antigua.....	March 21-31	<i>Sea Nymph</i>	Alcoa Steamships
Bahamas.....	March 11	<i>Canadian Leader</i>	Canadian National
Bahamas.....	March 25	<i>Canadian Victor</i>	Canadian National
Bahamas.....	April 10	<i>Canadian Leader</i>	Canadian National
Barbados.....	March 7-12	<i>Canadian Challenger</i>	Canadian National
Barbados.....	March 7-17	<i>Alcoa Pilgrim</i>	Alcoa Steamships
Barbados.....	March 15-20	<i>Chomey</i>	Canadian National
Barbados.....	March 21-31	<i>Ses Nymph</i>	Alcoa Steamships
Bermuda.....	March 7-10	<i>Fort Townshend</i>	Furness Withy
Bermuda.....	March 7-12	<i>Canadian Challenger</i>	Canadian National
Bermuda.....	March 7-17	<i>Alcoa Pilgrim</i>	Alcoa Steamships
Bermuda.....	March 11	<i>Canadian Leader</i>	Canadian National
Bermuda.....	March 21-31	<i>Ses Nymph</i>	Alcoa Steamships
Bermuda.....	March 25	<i>Canadian Victor</i>	Canadian National
Bermuda.....	April 10	<i>Canadian Leader</i>	Canadian National
British Guiana.....	March 7-12	<i>Canadian Challenger</i>	Canadian National
British Guiana.....	March 7-17	<i>Alcoa Pilgrim</i>	Alcoa Steamships
British Guiana.....	March 15-20	<i>Chomey</i>	Canadian National
British Guiana.....	March 21-31	<i>Sea Nymph</i>	Alcoa Steamships
Dominica.....	March 7-12	<i>Canadian Challenger</i>	Canadian National
Grenada.....	March 7-12	<i>Canadian Challenger</i>	Canadian National
Grenada.....	March 7-17	<i>Alcoa Pilgrim</i>	Alcoa Steamships
Grenada.....	March 21-31	<i>Sea Nymph</i>	Alcoa Steamships
Guadeloupe.....	March 15-20	<i>Chomey</i>	Canadian National
Jamaica.....	March 11	<i>Canadian Leader</i>	Canadian National
Jamaica.....	March 15-20	<i>Chomey</i>	Canadian National
Jamaica.....	March 25	<i>Canadian Victor</i>	Canadian National
Jamaica.....	April 2-5	<i>Oakmount Park</i>	Pickford and Black
Jamaica.....	April 10	<i>Canadian Leader</i>	Canadian National
Jamaica.....	April 19-22	<i>Dufferin Bell</i>	Pickford and Black
Jamaica.....	May 16-19	<i>Oakmount Park</i>	Pickford and Black
Martinique.....	March 15-20	<i>Chomey</i>	Canadian National

Departures from Halifax—Concluded

Destination	Loading Date	Vessel	Operator or Agent
Montserrat.....	March 7-12	<i>Canadian Challenger</i>	Canadian National
St. Kitts.....	March 7-12	<i>Canadian Challenger</i>	Canadian National
St. Kitts.....	March 7-17	<i>Alcoa Pilgrim</i>	Alcoa Steamships
St. Kitts.....	March 21-31	<i>Sea Nymph</i>	Alcoa Steamships
St. Lucia.....	March 7-12	<i>Canadian Challenger</i>	Canadian National
St. Lucia.....	March 7-17	<i>Alcoa Pilgrim</i>	Alcoa Steamships
St. Lucia.....	March 21-31	<i>Sea Nymph</i>	Alcoa Steamships
St. Vincent.....	March 7-17	<i>Alcoa Pilgrim</i>	Alcoa Steamships
St. Vincent.....	March 21-31	<i>Sea Nymph</i>	Alcoa Steamships
Trinidad.....	March 7-12	<i>Canadian Challenger</i>	Canadian National
Trinidad.....	March 7-17	<i>Alcoa Pilgrim</i>	Alcoa Steamships
Trinidad.....	March 15-20	<i>Chomedy</i>	Canadian National
Trinidad.....	March 21-31	<i>Sea Nymph</i>	Alcoa Steamships

Departures from Saint John

*Calls at Halifax two days later.

Destination	Loading Date	Vessel	Operator or Agent
Africa-East—			
Lourenço Marques...	March 1-10	<i>Empire Eddystone</i>	Elder Dempster
Lourenço Marques...	March 15-25	<i>Cabano</i>	Elder Dempster
Lourenço Marques...	April 1-10	<i>Cambray</i>	Elder Dempster
Africa-South—			
Cape Town.....	March 1-10	<i>Empire Eddystone</i>	Elder Dempster
Port Elizabeth.....	March 15	<i>A Ship</i>	Montreal Shipping
East London.....	March 15-25	<i>Cabano</i>	Elder Dempster
Durban.....	April 1-10	<i>Cambray</i>	Elder Dempster
Anglo-Egyptian			
Sudan—			
Port Sudan.....	April 10	<i>Lakeside</i>	March Shipping
Australia—			
Brisbane.....	March 4-12	<i>Kaikoura</i>	Montreal Australia New Zealand Line
Sydney.....			
Melbourne.....			
Adelaide.....			
Belgium—			
Antwerp.....	March 12-20	<i>*Beckenham</i> <i>Marchport</i> <i>Stad Maassluis</i> <i>Marchdale</i>	Cunard White Star March Shipping Shipping Limited March Shipping
Antwerp.....	March 15		
Antwerp.....	March 18		
Antwerp.....	March 25		
Ceylon—			
Colombo.....	March 10-15	<i>Clan MacKinnon</i> <i>City of Kimberley</i> <i>Catrine</i>	McLean Kennedy McLean Kennedy McLean Kennedy
Colombo.....	March 20-25		
Colombo.....	April 15		
China—			
Shanghai.....	Early April	<i>A Ship</i>	McLean Kennedy
Shanghai.....	April 10	<i>Lakeside</i>	March Shipping
Taku Bar.....			
Egypt—			
Port Said.....	March 10-15	<i>Clan MacKinnon</i> <i>City of Kimberley</i>	McLean Kennedy McLean Kennedy
Port Said.....	March 20-25		
Eire—			
Dublin.....	March 22	<i>Irish Elm</i>	Shipping Limited
Cork.....	March 12-16	<i>Lord Glentoran</i>	McLean Kennedy
France—			
Marseilles.....	March 15	<i>Fort Perrot</i>	Montreal Shipping
Le Havre.....	March 15	<i>Marchport</i>	March Shipping

Departures from Saint John—Continued

Destination	Loading Date	Vessel	Operator or Agent
Germany—			
Hamburg.....	March 15	<i>Marchport</i>	March Shipping
Hamburg.....	March 25	<i>Marchdale</i>	March Shipping
Greece—			
Piraeus.....	April 15	<i>Mont Sorrel</i>	Montreal Shipping
Hong Kong.....	Early April	<i>A Ship</i>	McLean Kennedy
	April 10	<i>Lakeside</i>	March Shipping
India—			
Karachi.....	March 10-15 March 20-25 April 15	<i>Clan MacKinnon</i> <i>City of Kimberley</i> <i>Catrine</i>	McLean Kennedy
Madras.....			McLean Kennedy
Bombay.....			McLean Kennedy
Calcutta.....			
Bombay.....	April 10	<i>Lakeside</i>	March Shipping
Iraq—			
Basra.....	April 10	<i>Lakeside</i>	March Shipping
Italy—			
Genoa.....	March 15	<i>Fort Perrot</i>	Montreal Shipping
Genoa.....	April 15	<i>Mont Sorrel</i>	Montreal Shipping
Venice.....			
Venice.....	March 25	<i>Mont Gaspe</i>	Montreal Shipping
Mediterranean—			
Central and	March 15 March 25 April 15	<i>Fort Perrot</i> <i>Mont Gaspe</i> <i>Mont Sorrel</i>	Montreal Shipping
Western Areas.....			Montreal Shipping
			Montreal Shipping
Mexico—			
Vera Cruz.....	March 30	Bell Park	McLean Kennedy
Tampico.....			
Morocco—			
Casablanca.....	March 15	<i>Fort Perrot</i>	Montreal Shipping
Netherlands—			
Rotterdam.....	March 15	<i>Marchport</i> <i>Stad Maassluis</i> <i>Marchdale</i>	March Shipping
Rotterdam.....	March 18		Shipping Limited
Rotterdam.....	March 25		March Shipping
Rotterdam.....	March 12-20	* <i>Beckenham</i>	Cunard White Star
Amsterdam.....			
Northern Ireland—			
Belfast.....	March 8-12	<i>Fanad Head</i>	McLean Kennedy
Philippines—			
Manila.....	Early April	<i>A Ship</i> <i>Lakeside</i>	McLean Kennedy
Manila.....	April 10		March Shipping
Poland—			
Gdansk.....	March 15	<i>Marchport</i> <i>Marchdale</i>	March Shipping
Gdansk.....	March 25		March Shipping
Portugal—			
Lisbon.....	March 15	<i>Fort Perrot</i>	Montreal Shipping
Singapore.....	April 10	<i>Lakeside</i>	March Shipping
Trieste.....	March 25	<i>Mont Gaspe</i> <i>Mont Sorrel</i>	Montreal Shipping
	April 15		Montreal Shipping
United Kingdom—			
Avonmouth.....	March 11-19	<i>Dorelian</i> <i>Deed</i>	Cunard White Star
Avonmouth.....	March 14-17		Furness Withy
Glasgow.....	March 4-10	<i>Gracia</i> <i>Salacia</i>	Cunard White Star
Glasgow.....	March 18-24		Cunard White Star
Hull.....	March 18-22	<i>Consuelo</i>	McLean Kennedy

Departures from Saint John—Concluded

Destination	Loading Date	Vessel	Operator or Agent
Liverpool.....	March 2-9	<i>Fort Beausejour</i>	Cunard White Star
Liverpool.....	March 8-14	<i>Beaverburn</i>	Canadian Pacific
Liverpool.....	March 12-16	<i>Lord Glentoran</i>	McLean Kennedy
Liverpool.....	March 25-31	* <i>Fort Ticonderoga</i>	Cunard White Star
Liverpool.....	April 10	<i>Beaverford</i>	Canadian Pacific
Liverpool.....	April 19	<i>Beaverburn</i>	Canadian Pacific
London.....	March 5-13	<i>Trewellard</i>	Cunard White Star
London.....	March 19	<i>Beaverlake</i>	Canadian Pacific
London.....	March 22-29	<i>Hillcrest Park</i>	Cunard White Star
London.....	April 14	<i>Beaverdell</i>	Canadian Pacific
London.....	April 18	<i>Beaverglen</i>	Canadian Pacific
Manchester.....	March 17-20	<i>Manchester City</i>	Furness Withy
Manchester.....	March 24-27	<i>Manchester Regiment</i>	Furness Withy
Newcastle.....	March 19-22	<i>Cairnvalona</i>	Furness Withy

Departures from Vancouver

Ships listed under "Departures from Vancouver" may possibly be loading in addition at New Westminster. Exporters should communicate with agents in Vancouver to obtain further information concerning loading dates, loading berth, available cargo space and rates.

Destination	Loading Date	Vessel	Operator or Agent
Africa—South—			
Cape Town.....	Mar. 26-April 10	<i>Lake Kamloops</i>	North Pacific Shipping
Port Elizabeth.....			
East London.....			
Durban.....			
Australia—			
Sydney.....	Mid-April	<i>Kookaburra</i>	Empire Shipping
Melbourne.....			
Adelaide.....			
Sydney.....	March 13	<i>Mt. Holyoke Victory</i>	Canadian Australasian
Hobart.....			
Melbourne.....			
Melbourne.....	March 20	<i>Wairuna</i>	Canadian Australasian
Sydney.....			
Sydney.....	Mid-April	<i>Suva</i>	W. R. Carpenter
Sydney.....	May	<i>Rabaul</i>	W. R. Carpenter
Melbourne.....	Early May	<i>Lautoka</i>	W. R. Carpenter
Chile—			
Arica.....	March 13-16	<i>Omar E. Chapman</i>	C. Gardner Johnson
Antofogasta.....			
Valparaiso.....			
China—			
Shanghai.....	March 7-19	<i>Turan</i>	Anglo Canadian Ship-
Shanghai.....	Mid-April	<i>Vingnes</i>	ping Empire Shipping
Shanghai.....	March 25	<i>Mangarella</i>	Empire Shipping
Tsingtao.....			
Taku Bar.....			
Shanghai.....	March 7-15	<i>Lake Sumas</i>	Canada Shipping
Chinwangtao.....			
Colombia—			
Buenaventura.....	March 13-16	<i>Omar E. Chapman</i>	C. Gardner Johnson
Ecuador—			
Guayaquil.....	March 13-16	<i>Omar E. Chapman</i>	C. Gardner Johnson

Departures from Vancouver—Concluded

Destination	Loading Date	Vessel	Operator or Agent
Guatemala— San José.....	March 13-16	<i>Omar E. Chapman</i>	C. Gardner Johnson
Mediterranean Ports.....	Mar. 20-April 5	<i>Lake Pennask</i>	Anglo Canadian Ship- ping
New Zealand— Auckland.....	March 20	<i>Wairuna</i>	Canadian Australasian
Wellington.....	Mid-April	<i>Suva</i>	Canadian Australasian
Panama— Balboa.....	March 13-16	<i>Omar E. Chapman</i>	C. Gardner Johnson
Peru— Callao.....	March 13-16	<i>Omar E. Chapman</i>	C. Gardner Johnson
Puerto Rico— Punta Arenas.....	March 13-16	<i>Omar E. Chapman</i>	C. Gardner Johnson
Salvador— La Libertad.....	March 13-16	<i>Omar E. Chapman</i>	C. Gardner Johnson
United Kingdom— Hull.....	Mid-March	<i>Empire Guinevere</i>	Furness Pacific
Liverpool.....	Late March	<i>Pacific Shipper</i>	Furness Pacific
London.....	March 6-20	<i>Lake Okanagan</i>	Empire Shipping
London.....	Mid-March	<i>Empire Guinevere</i>	Furness Pacific
Manchester.....	Late March	<i>Pacific Shipper</i>	Furness Pacific

Mexico Needs Lumber for Construction

Mexico City, February 27, 1947.—(FTS)—Exploitation of national forests for lumber has been forbidden by Presidential Decree, published in the *Diario Oficial* of Mexico on February 6. Lumber concessions in effect for government lands will not be renewed, the decree stated. Only fruit orchards, gum and resin trees, or sisal plants were exempted from the ruling covering all federal lands.

The measure has been taken in an effort to conserve Mexico's rapidly diminishing forests, which, in many cases, have been exploited indiscriminately and with no provision for reforestation. The decree of February 6 was preceded, in January, by a decree forbidding export of any Mexican mahogany or other hard or fine woods.

In view of continued construction in all major cities of the Republic, it was evident that the market for foreign lumber would immediately begin to return to its former volume.

Egypt Receives Shipment of Canadian Wheat

Cairo, February 19, 1947.—(FTS)—Nine thousand tons of Canadian wheat have arrived at Alexandria on a British ship. This shipment is part of the wheat supply which Egypt will receive in exchange for the surplus of the rice crop.

DIRECTORY INFORMATION

The Foreign Trade Service head office directory, as well as the directory of Foreign Commercial Representatives in Canada, appears only in the last issue of each month.

Foreign Trade Service Abroad

Cable address:—*Canadian*, unless otherwise shown.

Note.—Bentley's Second Phrase Code is used by Canadian Trade Commissioners.

Argentina

Buenos Aires—H. L. BROWN, Commercial Secretary, Canadian Embassy, Bartolomé Mitre 478.

Territory includes Uruguay and Paraguay.

Australia

Melbourne—F. W. FRASER, Commercial Secretary for Canada, 44 Queen Street.

Territory includes States of Victoria, South Australia, Western Australia, and Tasmania.

Sydney—C. M. CROFT, Commercial Counsellor for Canada, City Mutual Life Building, Hunter and Bligh Streets. Address for letters: Post Office Box 3952V.

Territory includes the Australian Capital Territory, New South Wales, Queensland, Northern Territory and Dependencies.

Belgian Congo

Leopoldville—L. H. AUSMAN, Canadian Government Trade Commissioner, Palace Hotel. Address for letters: Boîte Postale 373.

Territory includes Kenya, Uganda, Tanganyika, Angola and French Equatorial Africa.

Belgium

Brussels—B. A. MACDONALD, Commercial Secretary, Canadian Embassy, 46 rue Montoyer.

Brazil

Rio de Janeiro—MAURICE BÉLANGER, Commercial Secretary, Canadian Embassy, Ed. Métropole, Avenida Presidente Wilson, 165. Address for letters: Caixa Postal 2164.

Chile

Santiago—J. L. MUTTER, Commercial Secretary, Canadian Embassy, Bank of London and South America Building. Address for letters: Casilla 771.

Territory includes Bolivia.

China

Shanghai—L. M. COSGRAVE, Commercial Counsellor for Canada, 27 The Bund.

Colombia

Bogotá—M. T. STEWART, Canadian Government Trade Commissioner, Edificio Colombiana de Seguros. Address for letters: Apartado 1618. Address for air mail: Apartado Aereo 3562.

Territory includes Republic of Panama and the Canal Zone.

Cuba

Havana—R. G. C. SMITH, Commercial Secretary, Canadian Legation, Avenida de las Misiones 17. Address for letters: Apartado 1945.

Territory includes Haiti, Dominican Republic and Puerto Rico.

Egypt

Cairo—R. CAMPBELL SMITH, Acting Canadian Government Trade Commissioner,

22 Shari Kasr el Nil. Address for letters: Post Office Box 1770.

Territory includes the Sudan, Palestine, Cyprus, Iraq, Syria and Iran.

France

Paris—YVES LAMONTAGNE, Commercial Secretary, Canadian Embassy, 3 rue Scribe. Territory includes Switzerland, Algeria, Morocco and Tunisia.

Paris—J. H. TREMBLAY, Commercial Secretary (Agricultural Specialist), Canadian Embassy, 3 rue Scribe.

Territory includes Belgium, the Netherlands and Denmark.

Greece

Athens—T. J. MONTY, Commercial Secretary, Canadian Embassy, 31 Queen Vassilissis Sophias Street.

Territory includes Turkey.

Guatemala

Guatemala City—C. B. BIRKETT, Canadian Government Trade Commissioner, Post Office Box 400.

Territory includes Costa Rica, El Salvador, Honduras and Nicaragua.

Hong Kong

Hong Kong—K. F. NOBLE, Canadian Government Trade Commissioner, Hong Kong Bank Building. Address for letters: Post Office Box 126.

Territory includes South China, the Philippine Islands and French Indo-China.

India

Bombay—RICHARD GREW, Canadian Government Trade Commissioner, Gresham Assurance House, Mint Road. Address for letters: Post Office Box 886.

Territory includes Burma and Ceylon.

Ireland

Dublin—H. L. E. PRIESTMAN, Canadian Government Trade Commissioner, 66 Upper O'Connell Street.

Belfast—H. L. E. PRIESTMAN, Canadian Government Trade Commissioner, 36 Victoria Square.

Italy

Rome—J. P. MANION, Canadian Commercial Representative, Casella Postale 475.

Territory includes Czechoslovakia, Malta, Yugoslavia and Libya.

Jamaica

Kingston—M. B. PALMER, Canadian Government Trade Commissioner, Canadian Bank of Commerce Chambers. Address for letters: Post Office Box 225.

Territory includes the Bahamas and British Honduras.

Malayan Union

Singapore—PAUL SYKES, Canadian Government Trade Commissioner, Room D-2, Union Building.

Territory includes Singapore, North Borneo, Brunei, Sarawak, Siam and Netherlands East Indies.

Foreign Trade Service Abroad

Mexico

Mexico City—D. S. COLE, Commercial Counsellor, Canadian Embassy, Edificio Internacional, Paseo de la Reforma. Address for letters: Apartado Num. 126-Bis.

Netherlands

The Hague—J. A. LANGLEY, Commercial Counsellor, Canadian Embassy, Sophialaan 1-A.

Newfoundland

St. John's—J. C. BRITTON, Commercial Secretary for Canada, Circular Road.

New Zealand

Wellington—P. V. McLANE, Commercial Secretary for Canada, Post Office Box 1660. Territory includes Fiji and Western Samoa.

Norway

Oslo—S. G. MACDONALD, Commercial Secretary, Canadian Legation, Fridtjof Nansens Plass 5.

Territory includes Denmark.

Peru

Lima—W. G. STARK, Commercial Secretary, Canadian Embassy, Edificio Boza, Carabaya 831, Plaza San Martin. Address for letters: Casilla 1212.

Territory includes Ecuador.

Portugal

Lisbon—L. S. GLASS, Canadian Government Trade Commissioner, Rua Rodrigo da Fonseca 103.

Territory includes the Azores and Madeira, Spain, Spanish Morocco, the Canary Islands and Gibraltar.

South Africa

Cape Town—S. V. ALLEN, Commercial Secretary for Canada, New South African Mutual Buildings, 21 Parliament Street. Address for letters: Post Office Box 683. Territory includes Cape Province, Orange Free State, South-West Africa, Mauritius and Madagascar.

Cable address, Cantracom.

Johannesburg—J. H. ENGLISH, Commercial Counsellor for Canada, Mutual Buildings, Harrison Street. Address for letters: Post Office Box 715.

Territory includes Transvaal, Natal, Southern Rhodesia, Northern Rhodesia, Mozambique or Portuguese East Africa, and Nyasaland.

Cable address, Cantracom.

Sweden

Stockholm—F. H. PALMER, Commercial Counsellor, Canadian Legation, Strandvägen 7-C. Address for letters: Post Office Box 14042.

Territory includes Finland.

Trinidad

Port-of-Spain—T. G. MAJOR, Canadian Government Trade Commissioner, Colonial Life Insurance Building. Address for letters: Post Office Box 125.

Territory includes Barbados, Windward and Leeward Islands, British Guiana, Dutch Guiana, French Guiana, and the French West Indies.

United Kingdom

London—A. E. BRYAN, Commercial Counsellor for Canada, Canada House, Trafalgar Square, S.W.1.

Cable address, Sleighing, London.

London—R. P. BOWER, Commercial Secretary for Canada, Canada House, Trafalgar Square, S.W.1.

Territory includes the South of England, East Anglia and British West Africa (Gold Coast, Sierra Leone and Nigeria).

Cable address, Sleighing, London.

London—W. B. GORNALL, Commercial Secretary for Canada (Agricultural Specialist), Canada House, Trafalgar Square, S.W.1.

Cable address, Canfrucom.

London—Acting Animal Products Trade Commissioner, Canada House, Trafalgar Square, S.W.1.

Cable address, Agrilson.

London—R. D. ROE, Commercial Secretary for Canada (Timber Specialist), Canada House, Trafalgar Square, S.W.1.

Cable address, Timcom, London.

Liverpool—M. J. VECHSLER, Martins Bank Building, Water Street.

Territory includes the Midlands, North of England and Wales.

Glasgow—G. B. JOHNSON, 200 St. Vincent Street.

Territory covers Scotland.

Cable address, Cantracom.

United States

Chicago—J. M. BOYER, Canadian Government Trade Commissioner, Suite 1607, 188 West Randolph Street.

Los Angeles—V. E. DUCLOS, Canadian Government Trade Commissioner, Associated Realty Building, 510 West Sixth Street.

New York City—J. A. STRONG, Canadian Government Trade Commissioner, British Empire Building, Rockefeller Centre.

Territory includes Bermuda.

Cable address, Cantracom.

Washington—H. A. SCOTT, Commercial Counsellor, Canadian Embassy, 1746 Massachusetts Avenue, N.W.

Venezuela

Caracas—C. S. BISSETT, Canadian Government Trade Commissioner, Canadian Consulate General, Edificio America.

Address for letters: 8° Piso. Esq. Veroes. Territory includes Netherlands West Indies.

Foreign Exchange Quotations

The following are nominal quotations, based on rates available in London or New York and converted into Canadian terms at the mid-rate for sterling or par for United States dollars, as furnished by the Foreign Exchange Division of the Bank of Canada. These quotations may be found useful in considering statistics and prices generally, but Canadian exporters are reminded that the kinds of currency which may be accepted for exports to different countries are specifically covered by the Foreign Exchange Control Act and Regulations, and that funds may sometimes be tendered in payment for exports which cannot, in fact, be transferred to Canada. Both importers and exporters are advised to communicate with their bankers before completing financial arrangements for the sale or purchase of commodities, to ensure that the method of payment contemplated is not only possible but that it is in accordance with the Foreign Exchange Control Act and Regulations.

Country	Monetary Unit		Nominal Quotations Feb .24	Nominal Quotations March 3
Argentina.....	Peso	Off. Free	.2977	.2977
			.2440	.2440
Australia.....	Pound		3.2240	3.2240
Belgium and Belgian Empire.....	Franc		.0228	.0228
Bolivia.....	Boliviano		.0238	.0238
British West Indies (except Jamaica).....	Dollar		.8396	.8396
Brazil.....	Cruzeiro		.0544	.0544
Chile.....	Peso	Off. Export	.0517	.0517
			.0322	.0322
Colombia.....	Peso		.5714	.5714
Cuba.....	Peso		1.0000	1.0000
Czechoslovakia.....	Koruna		.0200	.0200
Denmark.....	Krone		.2083	.2083
Ecuador.....	Sucre		.0740	.0740
Egypt.....	Pound		4.1330	4.1330
Eire.....	Pound		4.0300	4.0300
Fiji.....	Pound		3.6306	3.6306
Finland.....	Markka		.0073	.0073
France and French North Africa.....	Franc		.0084	.0084
French Empire—African.....	Franc		.0142	.0142
French Pacific Possessions.....	Franc		.0201	.0201
Haiti.....	Gourde		.2000	.2000
Hong Kong.....	Dollar		.2518	.2518
Iceland.....	Krona		.1541	.1541
India.....	Rupce		.3022	.3022
Iraq.....	Dinar		4.0300	4.0300
Italy.....	Lira		.0044	.0044
Jamaica.....	Pound		4.0300	4.0300
Mexico.....	Peso		.2059	.2059
Netherlands.....	Florin		.3769	.3769
Netherlands East Indies.....	Florin		.3769	.3769
Netherlands West Indies.....	Florin		.5302	.5302
New Zealand.....	Pound		3.2402	3.2402
Norway.....	Krone		.2015	.2015
Palestine.....	Pound		4.0300	4.0300
Peru.....	Sol		.1538	.1538
Philippines.....	Peso		.5000	.5000
Portugal.....	Escudo		.0403	.0403
Siam.....	Baht		.1000	.1000
Spain.....	Peseta		.0916	.0916
Straits Settlements.....	Dollar		.4701	.4701
Sweden.....	Krona		.2783	.2783
Switzerland.....	Franc		.2325	.2325
Turkey.....	Piastre		.0035	.0035
Union of South Africa.....	Pound		4.0300	4.0300
United Kingdom.....	Pound		4.0300	4.0300
United States.....	Dollar		1.0000	1.0000
Uruguay.....	Peso	Controlled	.6583	.6583
		Uncontrolled	.5629	.5629
Venezuela.....	Bolivar		.2985	.2985