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Shoes Made in Canada (page 6)

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COVER . . . This craftsman, carefully shaping the ever-popular pump, is one of the 21 thousand Canadians employed in shoe manufacturing plants. Established nearly 100 years ago, when the high boot was in fashion, the industry has grown up with the country; now has a production of $111 million a year. (See story on page 6.)
—Photo by Shoe Information Bureau

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The Needle Trades
Look to New Markets

The latest exhibit in the Canadian Showroom at Rockefeller Center features fashions and footwear ---as these two Canadian industries turn to the United States for new sales opportunities.

by G. R. Poley
Chief, Textiles and Leather Section

ON August 4th, Canadian-made clothing and footwear went on display in the Canadian Showroom, Rockefeller Center. Throughout August and September, this exhibit will be focussing attention on the high quality and good styling of a wide range of Canadian goods—from women's dresses, cloaks and suits to blanket coats, slacks and other sportswear, and from children's sweaters to men's gloves and footwear.

Set up by the Canadian Government Exhibition Commission, the display is sponsored by the Department of Trade and Commerce. Because it is designed to arouse U.S. buyer interest, it features articles which have already made a reputation in that market and a number of new products which the manufacturers hope will prove popular and find a ready sale.

Space in the Showroom is limited and therefore only a small section of the industry's production could be included. This meant choosing with care and assembling a representative selection of Canadian merchandise which would appeal to a discriminating clientele. Some of the exhibitors are planning to visit New York this month to follow up trade leads.

Search for Stability

The needle trades (whose products provide the bulk of the display) are by no means new to Canada. But before the industry reached its present stage of development, it had to meet and overcome many problems. One of these was organization. Up to 1933, it was completely unorganized and at the mercy of exploiters who had no thought of building a stable, permanent business. At that time, some 250 manufacturers were operating and the average life of a firm in the needle trade group was about seven years.

A few of the responsible producers saw the need for organizing and for establishing a sound reputation throughout the industry for quality, style and good workmanship. In 1933 they founded the National Associated Women's Wear Bureau; its purpose—to supervise the trading and legislative problems of the industry. The next step came in 1937, when a number of guilds and councils were set up to look after the labour problems of the various sections of the industry. These associations, with their differing functions, have brought order and stability to an industry which today numbers approximately 1,000 manufacturers, over 300 of whom have been in operation for more than 15 years.

A long period of successful operation has enabled most firms to ride out the recent period of sub-normal business. This in itself demonstrates that the industry has developed a strength and resourcefulness that will help maintain its position as a source of employment for more than 18 thousand people. Its annual payroll totals over $25 million and the annual production is estimated at $130 million.

Promoting Sales

The chief centres of operation are Montreal and Toronto, with Winnipeg holding an enviable place in the manufacture of cloaks, suits and children's wear. Nor should Vancouver be overlooked—it is building up a worthwhile sportswear industry.

Some of the materials and fabrics which go into the making of garments are imported from the United Kingdom and the United States, but about 85 per cent of the raw material for the Canadian industry comes from domestic fabric mills.

One of the tasks which the various associations in the needle trades have undertaken is promoting Canadian fashions. High on the list of the promotion activities come the Spring and Fall Fashion Weeks. On these occasions, hundreds of buyers come together to watch trained models display what the manufacturers have to offer in dresses, coats, suits, sportswear, and allied products. By attending Fashion Week, they hope to be the first in their locality to show the newest designs and fabrics.

In style, undoubtedly the Canadian market is greatly influenced by its proximity to New York and by the garments shown in American movies and magazines. There is, however, plenty of Canadian ingenuity

This is a typical workroom scene in one of the Quebec factories turning out women's dresses. Most of the fabrics used are made in Canada and the completed frocks sold largely to Canadian customers.

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and fashion talent. This fact is evident in the type of garment chosen for the display at Rockefeller Center. Prospective American visitors to Canada will find there, for example, men's and women's blanket coats made of an all-wool fabric and 100 per cent Canadian.

Export Markets

The Canadian needle trades are already doing some export business. Several manufacturers have found a good market in the United States for sportswear, women's suits, wool slacks, etc., and this business should receive a boost as a result of the Rockefeller Center display.

Before the war, exports of rayon dresses alone amounted to approximately one million dollars a year. It reached a peak of over $3 million in 1946 when Wartime Prices and Trade Board price controls were in effect. At these low prices, the dollar value of exports represented a fairly large volume of dresses. South Africa was the best market but sales were widely distributed until import controls in other countries seriously curtailed exports. These conditions, we hope, will eventually disappear and we confidently regard the Rockefeller Center display as a primary step in improving the present limited opportunities.

Southwest Africa's Trade

CAPE TOWN—With the largest excess in the value of exports over imports in its history, the year 1951 was a successful one economically for Southwest Africa. This territory depends to a remarkable degree upon prices ruling in international markets. The limited range of the country's products—diamonds, karakul pelts, copper, lead, dairy products, wool, zinc, fishmeal and fish oil—must be exported for sale at prevailing prices. Similarly, goods consumed within the country have their costs determined abroad.

Overseas' trade of the territory last year was valued at £47·0 million, 49·7 per cent higher than in 1950. This gave a favourable trade balance of £11 million—with exports totalling £29 million, and imports, £18 million. Figures for 1950 (itself a record year) were: total trade, £34·4 million, exports, £21·4 million, and imports, £13 million.

Exports and Imports

The principal commodities contributing to the record value for exports in 1951, and compared with 1950, were:

	1951	1950
	(£000's)	
Diamonds	8,967	6,704
Karakul pelts	5,810	4,823
Lead ore and concentrates	5,350	3,259
Butter	1,185	1,137
Wool	1,528	869
Zinc ore and concentrates	1,460	919
Fishmeal	313	717
Fish, preserved	378	372

The principal buyers of Southwest African products last year were:

Buyers	1951	1950
United Kingdom	£13·3 million	£9·9 million
South Africa	5·8 "	5·2 "
Belgium	4·6 "	1·9 "
United States	3·0 "	2·7 "
Netherlands	1·4 "	1·0 "
Canada	£28,705 thousand	£112,483 thousand

Southwest Africa must import all supplies except meat, dairy produce and organic fertilizers. The major imports include:

	1951	1950
Machinery, transport and equipment for the mining industry	£6·2 million	£4·3 million
Textiles and apparel	3·3 "	2·2 "
Foodstuffs	1·9 "	1·6 "
Petroleum products	1·2 "	·9 "

Countries of origin for goods entering Southwest Africa are difficult to determine because of trans-shipment at South African ports. Almost 20 per cent of the imports are recorded as "South African—imported goods re-exported". The principal suppliers are as follows:

Suppliers	1951	1950
South Africa	£10·1 million	£7·3 million
West Germany	1·0 "	·5 "
United Kingdom	·8 "	·6 "
Canada	£202,331 thousand	£112,483 thousand

Mining and Agriculture

Export values for base metals and minerals have increased progressively in each year since 1945. Because of the high prices in world markets for base metals and minerals, the value of Southwest Africa's mineral exports during 1951 amounted to £15·9 million as against £10·5 million in 1950. There are 102 mineral producers registered in the country but of these, 20 companies contribute more than 99 per cent of the base metal and mineral output.

Diamonds, sold through the Central Selling Organization of the De Beers Group, are the largest single item in the mineral production. Proceeds in 1951 were a record £9·0 million, including £8·5 million in gem stones. The previous year's sales were £6·7 million and included £5·8 million in gem stones.

Better than average production, combined with higher prices, made the year a profitable one for the agricultural industry, whose net return exceeded £1·5 million. Beef cattle shipments declined by three per cent to 108 thousand head, but the net return was higher.

The decline in the price of karakul pelts during December 1950 was only temporary, and the average price per skin during 1951 was 42/– as against 38/10d. in 1950. Production in both years was 2·6 million skins, but the producers' returns of £5·1 million in 1951 were £400 thousand higher.

Economic activity in Southwest Africa should continue this year at the 1951 level and may well surpass it. However, declining prices for base metals may mean lower export values and a less favourable trade balance in the coming months.

—Kenneth F. Noble
Canadian Government Trade Commissioner

Shoes - Made in Canada

. . . pioneered about 100 years ago, the Canadian shoe manufacturing industry has kept abreast of technical advances and changes in fashion; seeks new markets

by F. T. Carten
Commodities Branch

THE Canadian shoe manufacturing industry is fast aproaching its 100th birthday. In the first half of the 19th century, Canadians ordered their shoes from small home workshops or bought the products of the New England factories. But in 1859, shoe manufacturers in this country received special concessions from the Government to encourage their infant industry. By 1900, some 179 plants, employing 13 thousand people, were turning out shoes valued at $18 million. In 1950, 292 shoe factories (most of them located in Ontario and Quebec) had a production valued at $111 million and employed 21 thousand persons. In fact, shoe manufacturing has become one of the forty leading Canadian industries.

The constant discovery of new techniques has made this growth possible. About 1846, Elias Howe of Spencer, Massachusetts, invented a sewing machine which could be adapted to shoemaking. Sixteen years later, Auguste Destouy developed in France a welt sewing machine which was perfected by Charles Goodyear, Jr. From the work of these two men came the well known Goodyear welt process in shoe manufacture.

Change and Growth

About 1899, the three principal companies in the shoe machinery field—McKay Shoe Machinery Company, the Consolidated McKay Lasting Machine Company, and the Goodyear Shoe Machinery Company, combined to form the United Shoe Machinery Company, which still leads the field and has branches in many countries. About a year later, the system of leasing shoe machinery made its appearance. Most manufacturers now rent or pay a royalty on their production machinery rather than purchasing it outright.

Several of the leading shoe manufacturers in Canada have been operating continuously for the past 75 or more years. In that time, they have witnessed many revolutionary changes in construction, styling and materials. Originally, shoes were made on one last only and could be worn on either foot. About 1865, right and left lasts were developed. Next came the introduction of half sizes in 1880, and this method of shoe sizing still prevails in North America. Rubber heels appeared in 1885; slide fasteners in 1893. Men's oxfords were shown for the first time in 1898. Not everyone was prepared for this last style change. The story is told that one retailer, on opening a shipment, wanted to return it to the manufacturer to have the tops attached!

The manufacturing process was speeded up with the coming, in 1928, of a new way of attaching soles to uppers. Formerly the sole was nailed, pegged or sewed to the upper. Now it was cemented, using a special cement and solvent developed by Du Pont. The cementing process has made shoes cheaper and faster to produce. It also gives a neater appearance, especially in women's shoes.

Following Fashion

No one who remembers the years 1900-1910, when women wore high-laced or buttoned walking boots or high patent-leather shoes, needs to be reminded of the style changes in women's footwear that the years have brought. The open toe, the sling back, the platform sole, the wedge heel, have all made their appearance. Casual and sports shoes have become popular. Once shoes came in black and tan only and in calf, patent leather, or kid. Now the customer can choose from many different colours, in many kinds of leather and in other fabrics, ranging from cotton and linen to nylon and other synthetics.

The synthetics have come into use for soles as well as uppers. In 1947 and 1948, about 85 per cent of the shoes made in Canada were soled with leather; today, only 45 per cent have leather soles.

Canadian shoe manufacturers employ all the standard construction methods—nailing, sewing and cementing. Usually one or two of these methods are combined in making men's, women's, children's, and babies' shoes.

In 1950, the 292 shoe manufacturing plants turned out nearly 34 million pairs of shoes, comprising:

Men's and Boys'	9,126,753	pairs
Women's and Misses'	19,196,313	"
Children's	2,753,377	"
Babies'	2,818,885	"
Total	33,895,328	"

Banner year for the industry so far was 1949, when nearly 36 million pairs were produced, some of them for distribution abroad by UNRRA.

Practically all this production is sold in Canada; in 1951, for example, only 46 thousand pairs of shoes were exported and of these, 28 thousand pairs went to the United States. Before the war, the British West Indies bought Canadian shoes but the shortage of dollars has all but wiped out this market.

If he wishes to expand his production, the Canadian shoe manufacturer has two choices: to persuade Canadians to buy more shoes, or to uncover and expand export markets. Today, shoe sales in Canada average about 2¼ pairs per person per year, compared with about three pairs per person in the United States. The United States provides the chief competition in the domestic market; in 1951, we imported about 600 thousand pairs of U.S.-made shoes.

Of recent years, men's shoes made in Canada have been finding a limited market across the border, where their high quality, appearance, and sound construction are attracting buyers. That is why the footwear display at the Canadian Showroom in Rockefeller Center this month and next consists entirely of men's shoes. Manufacturers here hope that the exhibit will arouse interest and attract discriminating buyers.

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Norway Has a Banner Year

A boom in merchant shipping and a remarkable increase in exports made possible a first postwar trading surplus in 1951.

by J. L. Mutter
Commercial Secretary for Canada

OSLO—The increase in Norway's production, so prominent in 1950, continued throughout 1951. The capacity of the more important industries was greater than ever; the agricultural and fisheries industries improved their equipment; the merchant fleet had a net increase of nearly 300 thousand gross tons. Favourable external conditions made it easy to find markets for this increased production. Price levels for the export and shipping industries were so high that, in spite of large imports, the balance of payments showed a surplus for the first time since the war ended. Foreign exchange reserves have increased.

All this activity went on against the background of an uncertain international situation and an inflationary trend. The darker side of the picture showed a decline in monetary values which still continues, and which is expected to affect both economic and social activities unfavourably in 1952.

Balance of Payments

The most striking feature in the economic development of Norway in 1951 was the marked improvement in the balance of payments. The year before, the deficit in the balance of payments amounted to approximately 940 million kroner. This deficit was reduced to 90 million by June 1951. For the whole year, the Norwegian balance of payments showed a surplus on current account of approximately 190 million kroner.* As a result of several factors, Norway's total income in foreign exchange increased from 3,726 million kroner in 1950 to 6,194 million in 1951, or approximately 66 per cent.

Money and Credit Market

The marked change in the Norwegian external economy has, of course, influenced the position of the Bank of Norway. During the first half of the year the net foreign exchange position of the Bank improved by 64 million kroner and up to the middle of December 1951 this position has been further improved. Compared with the situation at the beginning of 1951, holdings of foreign exchange increased and foreign exchange debts were somewhat reduced. The net result was an improvement in the total

* This improved position enabled Norway, on May 1, 1952, to revise and extend its import free list, placing over 75 per cent of the country's imports from Western European countries on the free list, in accordance with the OEEC trade liberalization agreement—Editor.

foreign exchange position of 251 million kroner. Figures on the foreign exchange position of the Norwegian joint stock banks show the same development.

As the Bank of Norway has acquired foreign exchange assets, it has released a corresponding amount in the form of notes or demand deposits. Certain internal financial transactions have also contributed to this move. In March, approximately 500 million kroner, formerly blocked deposit accounts ("Riksinnskudd"), were released. In May, an amount of 400 million kroner from the blocked Regulation Account was placed at the disposal of government banks. As a result of these expansive tendencies, the total volume of notes and demand deposits with the Bank of Norway rose by 879 million kroner.

The supply of fresh liquid funds to the banking system was, however, considerably less. As in former years, ERP and EPU counterpart funds were paid into special blocked accounts. By the middle of December, these accounts were 615 million kroner higher than at the beginning of the year. A corresponding amount was therefore withdrawn from circulation and to a certain degree this has outweighed the expansion mentioned above. There was, however, an improvement during the year in the liquid position of joint stock banks and savings banks. As a result, the banks have been able to expand their loans and discounts. During the first ten months of the year, short loans and discounts rose by 15 per cent, which corresponds to the increase in the wholesale price level in the same period. In real terms, therefore, the amount of short loans and discounts granted by joint stock banks and savings banks has not increased during 1951.

Bond and Share Market

Bond prices declined during 1951. At the beginning of the year, 2·5 per cent long-term government bonds were quoted at 93 per cent of par. In the middle of December, quotations generally were below 90 per cent. Mortgage banks, which are not permitted to issue bonds bearing more than 2·5 per cent nominal interest, have been unable to obtain funds in the market. Special measures have thus been necessary to furnish them with working capital. The 400 million kroner released from the blocked Regulation Account has already been spent and the mortgage banks operating under a government guarantee were again, at the end of the year, in a difficult position. The Financial and Monetary Advisory Committee is studying the problem but no decision has so far been taken. Either interest rates will have to be raised or liquid funds must be supplied from other sources than the bond market.

Share prices, on the other hand, rose steadily during the first three months of the year, the official share price index rising from 179·2 in December 1950 to 192·3 in March. There was a subsequent decline in the index which reached its lowest point, 184·9, in July, after which it again rose steadily to 192·4 in November.

Foreign Trade

Norway did not improve its balance of payments by reducing imports, which in 1951 had a value of 6,264 million kroner, or 1,419 million more than in the preceding year. The country's improved economic position stems largely from the remarkable increase in exports—from 2,780 million kroner in 1950 to 4,428 million in 1951. To some extent the exceptionally

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large export of old ships contributed towards this result. Much more significant from an economic point of view, however, was the increased export of commodities, rising from 2,669 million kroner in 1950 to 3,980 million in 1951, or by 49 per cent. The total deficit in the trade balance is estimated at 1,380 million kroner in 1951, compared with 1,332 million in 1950.

Norway's imports from Canada increased considerably—from $32·2 million as compared with $18·9 million in 1950. Most important items were wheat, rye, barley, wheat flour, nickel in matte or speiss, fine copper in ore, zinc in ore, ores n.o.p., asbestos milled fibres, drugs and chemicals n.o.p., carbon graphite electrodes, passenger automobiles, and seal oil. Exports to Canada more than doubled, totalling $3 million as against $1·4 million in 1950. The largest export items were canned anchovies and sardines, ferro silicon, butter, synthetic staple fibres, calcined magnesite, commercial fishhooks, mechanical wood pulp, salted herrings, canned kippered herrings, and sportsmen's fishing tackle.

The Labour Market

The employment situation continued satisfactory throughout the year. The number of insured workers employed in November was over 916 thousand; unemployed persons numbered 10,099, or a few hundred more than in the same month of 1950.

Like all other parties to NATO, Norway is rapidly increasing her defence expenditures. When the new three-year plan recently announced is in full operation, the demand for manpower for defence purposes of all kinds will be doubled as compared with 1949. A greater strain on the labour market is therefore to be expected. Since full employment already exists with only moderate seasonal unemployment, special measures will be needed. Scarcity of manpower is one of the main problems of the Norwegian economy, though the past few months have witnessed minor adjustments in some branches caused by a falling-off in demand. There were no labour conflicts of any importance during the year. October saw the third general increase in wages within twelve months.

Prices and Wages

Because of the wage adjustment, prices of farm products have also been raised and farmers' incomes will increase by more than 100 million kroner. The rise in prices of important foodstuffs immediately affected the cost-of-living index. As the higher cost of production coming from higher wages is felt in business generally, it will also influence the index. On December 15 this index had reached 127·1, the highest figure so far, and it is still rising. The corresponding figure for December 1950 was 111·6. The wholesale price index rose from 230·8 in December 1950 to 270·4 in December 1951. The Norwegian authorities do not, however, consider it expedient to stop the rise in prices by augmenting price subsidies. But the rise in prices and wages ranks with the scarcity of manpower as an important problem in the Norwegian economy at the moment. Readjustments of some kind will be necessary if the situation is to be kept in hand.

Shipping made the most important contribution to the improvement in Norway's balance of payments in 1951. The shipping industry had an active year, with practically no tonnage laid up. During the year the merchant fleet increased by 142 ships totalling 706 thousand gross tons, of which 47 ships totalling 73 thousand tons were built in Norway. The gross sales amounted to 143 ships totalling 420 thousand tons, mainly sold abroad. At the end of 1951 the merchant fleet, including the whaling fleet, consisted of 2,169 ships totalling 5,787,000 gross tons. The tanker fleet, excluding the whaling factories, consisted of 343 ships totalling 2,839,000 tons. At the turn of the year 1951-52 the tonnage contracted for or under erection for Norwegian account totalled 2,508,000 gross tons, of which 558 thousand tons are being built in Norway.

Apart from a slight decline during the autumn months, the freight rates rose throughout the year. The net freight earnings of the Norwegian shipping industry in 1951 are estimated at approximately 2,000 million kroner as against 1,185 million in the previous year.

Fisheries and Farming

The year 1951 proved to be a record for the Norwegian fisheries. Winter herring fisheries totalled approximately 888 thousand tons, of which the first-hand value totalled 144·5 million kroner, as compared with 819,600 tons valued at 126·9 million kroner during the previous record year of 1948. The cod fisheries yielded 149,800 tons valued at 75·9 million kroner, as compared with 108,600 tons valued at 48 million kroner in 1950.

The total catch of the Norwegian fisheries in 1951 amounted to 1,646,-000 tons with a first-hand value of 474·8 million kroner.

Agricultural production suffered somewhat from the rainy autumn of 1951. In terms of "fodder units", the total result was 1,855 million as against 2,083 million in 1950. (The average figure is 2,049 million "fodder units"; one "fodder unit" is equal to the nutritive value of one kilogram of barley.) The grain crop totalled approximately 360 thousand tons. A characteristic feature of 1951 was the increase in the barley crop at the expense of wheat. The agricultural price index (April 1, 1938-December 31, 1939, equals 100) was 283 in October 1951, as compared with 262 in October of the previous year.

Forestry

During the felling season 1950-51, the production of timber amounted to approximately 6·5 million cubic metres. The average for the last six years has been approximately 6·7 million, and for the years immediately preceding the war about 5·7 million. By the middle of December 1951, approximately three million cubic metres of the seven million planned for the 1951-52 season had been produced. This represented about 10 per cent more than in December 1950.

The development of Norwegian industry continued throughout 1951 and the more important plants have large expansion programs under way. Production increased during the year as a result of the greater capacity of the various industries and the improvement in marketing possibilities. The total index for industrial production rose from 141·4 in 1950 to 148·4 in 1951 (1938 equals 100). The index for export industries increased from 126·1 to 135·6, and for home industries from 148·8 to 154·5.

Netherlands Fishermen Face Many Problems

. . . . . chief among them--lack of capital to modernize the fishing fleet, rebirth of German competition, and the threat of over-fishing in the North Sea.

by W. G. Pybus
Assistant Commercial Secretary for Canada

THE HAGUE—The Netherlands fishing industry had a good year in 1951 though it is beset by some fears about its future. It disposed of a surplus of 400 thousand barrels[1] of salt herring, held over from 1950, and booked orders for the greater part of the 1951 herring catch for salting—an estimated 800 thousand barrels. Fish landings exceeded those of 1950 and even reached the one million box[2] mark. A firm demand helped to push up prices, on an average, by 10 to 15 per cent. Liberalization of European trade brought increased sales to Western Germany, Belgium, France, Norway and other OEEC countries. Eastern Germany and Poland took larger quantities, partly in exchange for potassium, and this helped to use up accumulated stocks. Herring sales to the United States and Canada, although relatively small, increased by 25 per cent over 1950.

Fleet Needs Modernizing

In spite of the success of its 1951 operations, the Netherlands fishing industry is gravely concerned about its inability to modernize and expand its fleet. Of the 100 odd ships operating from Scheveningen, for example, only three were built since the war. The majority are from 15 to 25 years old. One of Holland's major fishing enterprises says that it is impossible to make replacements because of the high taxes imposed on the industry by the Netherlands Government. Executives of this company estimate that only about 30 per cent of its 1951 profits will be left after taxes. Nor can the high cost of replacing ships be covered by funds available for re-investment. To illustrate the problem, the company pointed out that a new ship of 200 tons equipped with a 300 to 400 h.p. engine costs 500 thousand guilders. The scrap value of an old ship is about 20 thousand guilders. To date the Netherlands Government has not offered to put up any more than the scrap value of old ships. Consequently, for each new ship the firm must find at least 460 thousand guilders. With earnings limited by taxes, this amount is extremely difficult to raise.

The reappearance of a modern West German fishing fleet, built with ECA and West German Government assistance, is causing increasing concern. The well-equipped, faster German vessels can land fish more cheaply

[1] One barrel contains 100 kilos.
[2] One box contains 50 kilos.

than their Dutch competitors. A Netherlands fresh frozen fillet plant which owns its own fishing vessels discovered that it could buy fresh fish in Bremerhaven more cheaply than its own ships could deliver it to the plant.

Because the supply of suitable fish was inadequate, the company had to suspend its exports of frozen fillets to the United States. This lack of adequate supplies plus higher operating costs may mean, the Netherlands fishing companies fear, that West Germany will take over many of Holland's markets.

Conservation Measures

The danger of over-fishing has also received attention. In the explanatory notes to the bill submitted to the Netherlands Parliament covering the size of the meshes and minimum sizes of certain varieties of fish, the Minister of Agriculture, Fisheries and Food stated that the greatly decreased catches of round fish in the North Sea make certain measures necessary to prevent a further decline. Modernization of the fishing vessels and improved techniques have increased the threat that over-fishing presents.

In applying the law, the Government is prepared to be as flexible as possible within the scope of the London treaty. If fishing is carried out with nets having meshes wider than 80 mm. (wet measured), then the law must be observed in full. Although the chances of catching under-sized fish are small, the prescribed width of the meshes assures that important types of fish below the prescribed size can escape. Because of the strong resistance which the nets create as a result of the ship's speed, the width becomes approximately 90 mm. after a short time in the water. This would increase the possibility of escape for under-sized fish.

The difficulties which the small coastal fishermen will encounter under the proposed regulations can be partly offset by postponing the date on which the law becomes effective. Fishermen will be able to replace their present nets, and the manufacturers will have time to make nets of the new type. The new regulations will not, however, be postponed longer than is necessary.

Some people questioned whether the Government would contribute towards the cost of purchasing new nets. Its reply was that nets have only a limited life and the fishing companies must purchase new equipment from time to time. If, therefore, a transition period is observed, the normal operation costs need not be exceeded. Coastal fishermen may, in

(Right) Before the herring season opens, the Netherlands herring fleet, gaily decorated, is inspected by thousands of visitors. In 1951, herring sales to the U.S. and Canada increased by 25 per cent over 1950.

the beginning, be affected by the measures taken, because they carry on part of their operations in places where there are many under-sized fish. However, the measure may improve the fish supply so that in the near future the catch will have a greater value.

Belgium had already decided that the rule about larger meshes would become effective on April 1, 1951. This was postponed, however, when it appeared that the regulations would not be in force in the Netherlands on that date. It is expected, however, that as soon as the Netherlands puts it into effect, Belgium will follow suit. Even if Belgium does not, the Netherlands will stick to this course.

Prescribing a mesh-width of 80 millimetres for large fishing companies and one of 70 millimetres for the coastal industry is not possible under the approved London agreement.

One day of rest for all fishing companies would, if it could be introduced generally, be an important factor in reducing the chances of overfishing the North Sea. It is, however, an open question whether international agreement could be reached. In the meantime, the Government is prepared to consider this idea and to ask the views of the other governments who signed the contract.

The Minister also stated that a commission had been appointed to seek a solution to the difficulties of the sea-fishing industry. This commission will also discuss ways and means to re-organize the Netherlands fishing fleet. It is expected that the report of the commission, of which Prof. Dr. Tinbergen, head of the Netherlands Planning Bureau, is chairman, will be completed soon.

Shrimp Fishing Poor

Because of the large supply of shrimps and the consequent fall in prices, shrimp fishermen in the Province of Zealand have stopped their operations for the time being. They say that prices of Fl.0·14 to Fl.0·17 per kilo (1¾ to 2 cents a lb.) do not pay. Both the very large catches in 1951 and the liquidation of the Shrimp Purchasing and Selling Office in The Hague seem to be responsible for the fall in prices. This Bureau handled export orders and fixed the domestic prices and thus helped to regulate the market.

Forecast for 1952

The liberalization of Western European trade and the increasing demand for fish products have stimulated the fishing industry. For the first time since the war, orders have been booked in advance. Provided there are no drastic political and economic changes, the industry is optimistic about marketing possibilities for 1952. With the growing inflationary trend, lower-cost fish will supplant meat more and more on European dinner tables.

In spite of the more encouraging market prospects, the problem of renewing the fishing fleet clouds the future of the Netherlands fishing industry. The re-appearance of a modern West German fishing fleet makes it urgent to modernize equipment if the Netherlands hopes to retain a competitive position. Although the Government has this problem under study, the industry fears that the measures likely to be taken will not be strong enough to remedy the situation.

General Notes

CUBA

Cost of Living—Calculated on a basis of 100 for 1936, and covering a range of 42 food items, the Cuban Department of Agriculture announced that the cost of living stood at 251·5 for March 1952, compared with 250·1 for the same month a year ago. Meat, fish and milk came highest on the list, while lard and cooking oil remained the lowest—Havana, June 27.

HONG KONG

Open Market Steady—Throughout May and June the open market rate for U.S. dollars remained steady, varying only five points in the period. At the beginning of May, the quotation was HK$6.51 to US$1.00. It rose to $6.56 during the fourth week, eased to $6.54 at the first of June, then remained near this level for the rest of the month. On this basis, Canadian exporters to Hong Kong faced a disadvantage, vis-á-vis sterling area competitors, of an average addition of 12½ per cent to their quoted prices. This represents the mean of the ruling exchange premium unavoidably incurred by Hong Kong importers compelled to finance imports of Canadian merchandise in the open money market—Hong Kong, June 30.

Trade Values Decline—Values of Hong Kong's trade for January-May, 1952, show a marked falling-off in comparison with 1951. The monthly average in 1951 was, for imports, HK$405·9 million, and for exports HK$369·4 million. In May 1952, imports were valued at HK$300·8 million, and exports at HK$231·6 million. The decline is directly related to the curtailment of trade with China, attributable to the mainland's "anti-five-vice purge" of business (both government and private) which stalled most international trade during January to May 1952, inclusive. There were definite signs of resumption late in May—Hong Kong, June 30.

JAMAICA

Canadians Will Explore for Oil—The Jamaica Government has granted a licence to a large Canadian mining company to explore for oil and natural gas throughout the Colony. This matter first arose about a year ago when the legal adviser of the company visited Jamaica to negotiate with the local authorities. He was followed by technicians who made aerial and ground surveys—Kingston, July 14.

PHILIPPINES

New Bank For Manila—A new bank known as the Prudential Bank and Trust Company opened for business on July 3, 1952. The authorized capital of the bank is ten million pesos, of which slightly over two million pesos has been subscribed and paid in. There are now 15 commercial banks doing business in the Philippines—Manila, July 5.

SOUTH AFRICA

Unfavourable Trade Balance—Unless the value of imports during the rest of this year decreases, the value of South Africa's exports will exceed the maximum import figure of £406 million set when the import program for 1952 was announced. At the end of May imports totalled £193·6 million, an increase of £12·3 million over the same period last year. Exports were £9 million lower, at £143·5 million—Cape Town, July 4.

SPAIN

Cod-Fishing Fleet Enlarged—The Spanish cod-fishing fleet has been increased by the launching on June 10, of the new ship *Brisa,* with a displacement of 2,710 tons. This is the first of a series of four vessels to be built by the Constructora Naval de Sestao, Bilbao—Madrid, June 24.

TAIWAN

Favourable Balance of Trade—Trade returns issued by the Bank of Taiwan indicate that for the first four months of 1952, the country had a favourable balance of trade amounting to some US$3 million at April 30.

Such information must, however, be considered in conjunction with the additional value of MSA aid received, and incomplete statistics indicate this amounted to US$21·6 million for the first quarter—Hong Kong, June 27.

U.S. to Guarantee American Investments—Reports from Taipeh indicate that an agreement between the United States and Taiwan will shortly be signed whereby the United States Government will thenceforth guarantee all American private enterprise investments in Taiwan, where such investments assist industrialization—Hong Kong, June 27.

UNITED KINGDOM

Overseas Trade in June—In June, United Kingdom exports amounted to £185 million. Compared with May (a longer working month by four days) this was a reduction of 18 per cent. However, the shorter working period would mean a reduction of only 15 per cent.

Imports in June, £276·7 million, were down by 14 per cent from the May total. The excess of imports over exports for the month was £83·4 million, compared with £84·8 million in May. Exports to the United States in June totalled £11·6 million, compared with £13·5 million in May. Exports to Canada fell from £11·2 million to £9·5 million—London, July 14.

New England Buys Canadian Forest Products

Poor cutting practices in the past have depleted New England's supply of good timber and Canadian spruce, pulpwood and wood pulp thus find a good market there.

BOSTON—Canadian exporters share in the large and growing market for lumber, wood pulp and pulpwood in the six New England States. The need for imports of forest products may seem surprising because an estimated 77 per cent of New England is covered by forests—the largest percentage for any region in the country. However, because of wasteful cutting practices in the past, much of the remaining timber is of small size, inferior quality, and of an undesirable species—or grows in inaccessible locations. Yet New England is a prosperous industrial region, with highly developed wood-using industries and a high *per capita* consumption of forest products.

The region currently absorbs about $2\frac{1}{4}$ billion board feet of lumber a year. Its own production totals only one billion feet. The difference is made up principally by shipments from the west coast of the United States and Canada, from Eastern Canada, and from the Southern Atlantic States. Some specialty woods come in from other parts of North America and from foreign countries.

Eastern white pine is the most important lumber tree growing in New England and accounts for two-thirds of the region's lumber production. However, over-cutting has depleted the supply of top-quality pine and most of the current production falls into the lower grades. It is used chiefly for local construction and repairs, box shooks, and various industrial purposes. Other softwoods such as spruce and hemlock also supply limited amounts of lumber. Efforts are being made to find uses for the abundant mixed hardwoods throughout the region.

Sources of Supply

The major source of softwood lumber for New England's construction needs is the west coast of North America, comprising the states of Oregon and Washington and the provinces of British Columbia and, to some extent, Alberta. West coast hemlock finds particular favour as an all-purpose construction and industrial lumber. For shingles and siding, New Englanders prefer western red cedar. Douglas fir and western white spruce are other types of western lumber used widely in New England. Fir is assured of continuing demand because it comes in large sizes for heavy construction work. Western white spruce from British Columbia and Alberta has made remarkable gains in this market during the past two years.

Either rail or water transport is used in moving this lumber across the continent. The varying factors of railway freight rates, ocean cargo rates and availability of ships determine which means shall be used.

New England traditionally uses large amounts of spruce and augments diminishing local production with imports from eastern Canada. Active promotion by producers in Quebec and the Maritime Provinces has strengthened this trend, and it is estimated that 90 per cent of the eastern spruce used in New England is from Canada. Most of this Canadian spruce lumber moves in by rail, with occasional water shipments. The demand for spruce is general in all parts of New England, but particularly in the States of Maine, New Hampshire and Vermont, where most softwood construction work is done with spruce and domestic hemlock. For industrial uses such as crating, casing, cleating, and staging plank, spruce is still supreme. The chief limiting factor is the difficulty of obtaining spruce lumber in larger sizes.

Southern pine, cut in the southern Atlantic States, occasionally reaches the New England market. Although it is of good quality, the price fluctuates erratically and this factor, coupled with the high rail freight, tends to limit the movement.

New England must import both pulpwood and wood pulp to help meet the needs of her paper industry. This industry turns out more than $425 million worth of products a year, in terms of value added by manufacture. Although other regions of the United States are expanding their pulp and paper industries more rapidly, New England still produces one-eighth of the total U.S. production of paper and paper board. It accounts for 60 per cent of the nation's output of newsprint and smaller percentages of the cardboard, special industrial papers, fine and book papers, coarse papers, and paper board.

Purchases from Canada

Supplying some of the raw material are 38 pulp mills, which consume more than 2¼ million cords of pulpwood annually. Eastern Canada furnishes about one-fourth of this pulpwood, with shipments coming by water from Nova Scotia and by rail from New Brunswick and other provinces. The remainder comes from the region's own pulpwood production, consisting of 1¾ to 2 million cords of spruce and hemlock a year.

Wood pulp must also be imported. Nearly all of New England's domestically produced pulp is used on the spot and is not offered for general sale. Thus many paper mills, lacking their own pulp-producing facilities, must import pulp. The principal sources are Scandinavia, British Columbia and the Pacific Northwest States, Eastern Canada, and the Southern States. Water shipments from the Pacific Coast and Europe are discharged at Boston, Mass. and Portland, Maine. In recent years, wood pulp has been one of the major commodities arriving at the port of Boston, with the annual volume remaining well above 100 thousand tons.

In future, New England may have to rely more and more on imported pulpwood and wood pulp, because of a growing shortage of spruce in accessible locations. However, this may be counterbalanced by the use of pine and the mixed hardwoods found in the region. These woods are said to be well adapted to the production of kraft and paper board, a branch of the industry which is expanding rapidly.

—Roger R. Parlour
Vice-Consul of Canada and Assistant Trade Commissioner.

Australia's External Trade

Excess of imports over exports from the dollar area marked Australia's trade during 1951; from this has come a drive to cut down on imports from and increse exports to Canada and the United States.

by C. M. Croft
Commercial Counsellor for Canada

SYDNEY—Australia's exports during the financial year ended June 30, 1951, totalled £981·2 million* as against £611·7 million in the previous year. Imports were valued at £741·9 million as compared with £536·1 million in 1949-50. Exports thus exceeded imports by £239·4 million in 1950-51, as compared with £75·5 million in 1949-50—a fact that reflects the high level of export prices, particularly wool. Exports of bullion and specie reached £2·7 million (£2 million) and imports £2·5 million (£1·9 million).

Trade with Dollar Area

(year ended June 30, 1951)

	Exports to		Imports from	
Country	1950-51	1949-50	1950-51	1949-50
United States ...	£149·8 million	£49·6 million	£ 60·7 million	£ 52·2 million
Canada	17·2 "	9 "	17 "	13·3 "
Other dollar countries ...	3·6 "	2·6 "	140 thousand	153 thousand
Total	£170·6 "	£61·2 "	£ 77·7 million	£ 65·5 million

Trade with the sterling area, which included exports of £428·4 million (£347·1 million in 1949-50) and imports of £486·9 million (£362·6 million), showed an excess of imports of £58·5 million (£15·5 million). Other non-sterling area countries bought Australian goods to the value of £384·9 million (£205·3 million) and shipped to this country £179·6 million worth (£109·9 million). This left Australia with an excess of exports to those countries of £205·3 million (£95·5 million).

Trend Changes

This favourable state of Australia's trade did not continue throughout 1951. During the first five months of the current financial year (that is, the five months ended November 30, 1951) total exports, including bullion and specie, were valued at £268·5 million (£316·5 million in the corresponding months of 1950). Imports increased considerably, to £465·2 million (£285·4 million). There was, therefore, an excess of imports of £196·7 million, compared with an excess of exports of £31·1 million in the five months of 1950. This situation applied to all general areas.

* All values quoted are in the Australian pound, which fluctuated through the year in relation to the Canadian dollar. The nominal quotation by the Bank of Canada on December 28, 1951, was $2·2720 to the £1 Australian.

Australia had an excess of imports from the dollar area of £6·7 million (an excess of exports of £7·3 million in July-November 1950); an excess of imports amounting to £148·4 million (£34·3 million) with the sterling area; and an excess of imports from other non-sterling countries of £41·6 million (an excess of exports of £58·1 million).

Exports

The following were Australia's main customers in the year ended June 1951 (comparison with June 1950 included):

	1950-51	1949-50
United Kingdom	£319·8 million	£237·5 million
United States	149·8 "	49·6 "
France	90·2 "	40·7 "
Japan	61·7 "	24·0 "
Belgium	48·5 "	27·5 "
Germany	27·8 "	16·6 "
Egypt	22·5 "	9·7 "
India	22·0 "	37·0 "
New Zealand	20·3 "	21·3 "
Canada	17·2 "	9·0 "

Australia's exports were predominantly agricultural and no less than 84 per cent of the 1950-51 shipments consisted of animal substances not foodstuffs (largely wool) and foodstuffs of vegetable origin (essentially wheat and flour, fresh fruit and cane sugar).

Imports

Australia increased her purchases from abroad by over £206·3 million during this period. (Figure includes bullion and specie.) Her principal sources of supply were,

	1950-51	1949-50
United Kingdom	£357·1 million	£278·7 million
United States	60·7 "	52·2 "
India	35·3 "	27·7 "
Indonesia	21·4 "	14·7 "
Malaya	20·5 "	(figures not available)
Canada	17·0 "	13·3 million
Italy	16·6 "	9·1 "
France	16·3 "	10·6 "

Trade in July-November, 1951

In the five months ended November 30, 1951, trade changed considerably as compared with the corresponding period a year earlier and with the 1950-51 financial year. The total value of exports declined and imports expanded, leaving a substantial balance of imports as compared with a surplus of exports in the corresponding five months of 1950.

The reasons for this change were:

- Smaller volume of exports of a number of important commodities (including wool, frozen beef, lamb, mutton and pork, milk, wheat, fresh fruit and sugar) which were not offset by expanded shipments of such items as cheese, processed milk, canned meats, flour, etc.
- Lower average prices for greasy wool, scoured wool, sheepskins, wheat and wine, although higher averages prevailed for beef, butter, mutton, pig lead, raisins, sugar, tallow and zinc.
- Higher values of imports of most classes except rocks, minerals and hydrocarbons, gold and silver, and bronze specie.

In the absence of statistics showing quantities of imports of various classes, it is impossible to report accurately to what extent the increased value of imports represents higher prices abroad and to what extent it represents increased volume of imports. It seems safe to say that both of these factors are involved. In some cases, too, larger supplies available from overseas sources may be responsible but this is undoubtedly more than offset by the shortage of a number of important materials which are in universal short supply. Sulphur is one example. Imports of this amounted to £458 thousand in the five months as compared with £1,998,000 in the corresponding period in 1950.

Trade with Canada

Although details of the commodities involved are not yet available, the volume and value of trade between the two countries continues at satisfactory levels.

Australia has endeavoured to increase her exports to Canada and thus to earn much-needed dollars. Among the products which have been shipped to Canada in substantial quantities are: dried fruits (currants and raisins); canned fruits (peaches, apricots, pears, pineapple, and mixed fruits); pineapple juice; raw sugar; brandy; wines; rabbit skins; sheepskins; fresh lamb and mutton; canned beef; extracts of beef; gelatine; sausage casings; wool, including tops, and worsteds and serges.

Import Picture

Australia's purchases from Canada have been restricted to highly essential commodities and the range of goods was thus limited. Many Canadian products cannot be bought here now. An outstanding example is canned salmon, which formerly was sold extensively. The commodities which contributed largely to Australia's imports from Canada in 1951 were: tobacco; cotton tire fabrics; lumber, wood pulp, newsprint; tool steel; sewing machine needles; bookkeeping and calculating machines and parts; motor vehicles (not complete); aluminum in primary form; electric motors and parts; asbestos fibres; sandpaper and emery cloth; electrodes; sodium compounds; and motion picture film.

POINTERS ON POSTAGE

Is your company anxious to do more export business with foreign countries? Here's a point worth remembering: send all your correspondence by *airmail*. That sounds obvious, but recent letters from Trade Commissioners tell us that some firms send quotations and other information to distant countries by surface mail. The result: the letter takes six weeks to two months to reach its destination—and some more enterprising exporter gets the order.

Similarly, before your firm mails out letters containing "business reply" cards to be returnd postage-free, it is wise to make certain that none of these letters is going to a foreign address. Business reply cards with Canadian postage must be mailed *only* to addresses in Canada. If they go to the United States, naturally they must carry U.S. postage; to the United Kingdom, British postage, and so on. Business firms in Bermuda, in particular, have been complaining because both United States and Canadian companies continue to send them correspondence with business reply cards enclosed and incorrectly stamped for their return journey via Bermuda mails.

Commodity Notes

CUBA

Baby Chicks—Traditionally an importer of baby chicks (mainly from the United States), Cuba became an exporter recently with an initial shipment of 3,500 day-old chicks to Venezuela. Venezuela is switching over to Cuba as a supplier because it is nearer—Havana, June 30.

EGYPT

Cotton—A recent decree abolished the tax on cotton bought and shipped between May 19 and August 31—the unsold balance of the 1951 crop. From September on, when the 1952-53 season opens, the tax will be LE.6 per 100 kilos gross on long staple, LE.4 per 100 kg. on medium staple, and LE.3 per 100 kg. on waste cotton. Previous rates were LE.8, LE.·8 and LE.6, respectively—Cairo, July 10.

INDIA

Typewriters—The Remington Rand Company has registered a subsidiary concern, with rupee capital, to take over its business in India and begin making typewriters and other office equipment. With the growing use of Indian languages in offices, the manufacture of efficient typewriters with Indian types has become urgent. Remington's Indian factory may also become a useful earner of foreign exchange by exporting machines in languages spoken in Pakistan, the Middle East and Southeast Asia—Bombay, July 2.

Precision Tools—The government-owned high precision tool factory at Jalahall, near Bangalore, is expected to go into production by August 1953.

Two of the five hangars in which the factory will be housed have been erected. Sixty machines secured from the German reparation machinery are already at the site, and shipments from the Continent of further plant and machinery, worth Rs.8 million (Can.$1·8 million), have begun. European key technical personnel have been selected and the selection of Indian technical personnel is being considered—Bombay, June 13.

JAMAICA

Milk—In January-June 1952, Jamaican dairymen supplied the record quantity of 4,920 thousand quarts of fresh milk to the condensary, as compared with 4,190 thousand quarts in the same period of 1951. The condensary's output of condensed milk showed, of course, a comparable increase—from 114 thousand cases in the first half of 1951 to 137,900 cases in that of 1952. Good seasons are responsible for this record production.

It is expected that the condensary will receive by the end of this year 11 million quarts of fresh milk and produce 300 thousand cases of condensed —Kingston, July 14.

PHILIPPINES

Logs—The rules governing the grading and inspection of Philippine export logs by authorized lumber inspectors of the Bureau of Forestry have been revised. Formerly, grading rules for logs, veneer, and peeler logs were combined and the two grades were Veneer or Peel Log 1 and 2. In the revised grading rules, the veneer grades are separated from the peeler grades, and are classified: Peeler Log 1, 2 and 3 and Veneer Log 1, 2 and 3. Peeler logs are perfect cylindrically; veneer logs may be as much as five inches off centre. "Sawlog", representing the lowest grade for log, has been added, while the grade "merchantable" has been entirely eliminated—Manila, June 29.

PORTUGAL

Wheat—The 1951 wheat crop was considered one of the best in Portugal's history, but it still fell far behind the country's needs. Last year imports of nearly 200 thousand tons from the United States and Canada (25 thousand tons) were necessary to augment local production. Wheat is milled in Portugal to yield 78 to 84 per cent of flour. Even so, it is necessary to swell the flour produced by mixing in about 178 thousand tons of corn, rye and rice flour. Approximately one-fifth of the population consume only corn or rye bread—Lisbon, July 7.

SCOTLAND

Tools—A tool works factory in Bonnybridge has opened a branch in Inverasdale to manufacture a patent wall-fixing device. The plant has been provided by the County Council of Ross and Cromarty and leased to the company, which will employ the local crofters in this remote district to make the product—London, June 15.

SPAIN

Pulp and Paper—Spanish paper production is recovering from the difficulties of 1948 and 1949, a local trade journal reports. Peak production was reached in 1951 when 186,743 metric tons of paper and cardboard were produced—90,834 tons of printing paper and 19,774 tons of newsprint.

The use of imported pulps has been considerably reduced because of high prices. As a result, local pulps are being used in increasing quantities. During 1951, papermaking material consisted of: 81 thousand metric tons of esparto grass, 33 thousand tons of matweed, 67 thousand tons of cutting and old paper, and 91 thousand tons of wood pulp and other kinds of fibres (mainly straw—22 thousand tons). Total pulp production in 1951 is estimated at 179,569 metric tons, an increase of 50 per cent over the previous year—Madrid, June 24.

Trade and Tariff Regulations

Chilean Imports of Agricultural Machinery

Santiago, July 23, 1952—FTS—To promote increased agricultural production, a Chilean decree published January 17, 1951, provided for the duty-free and tax-free entry of the following agricultural machinery and implements:

Tractors up to 70 h.p.; all types of ploughs and harrows; cultivators; seeders and planters; fertilizer drills; manure spreaders; pulverizers; self-propelled and tractor-drawn combines; stationary threshing machines; windrowers; binders; trenching machines; elevating cutters; stock cutters; all types of rakes; hay balers; ensilage blowers; choppers; hay loaders; ensilage harvesters; corn huskers; corn binders; corn pickers; feed grinders; seed cleaners; grain sifting machines; milking and milk-cooling machines.

Irrigation equipment by sprinkling method and tree-root pullers have now been added to this list.

Irrigation pumps, pump motors, diesel-electric generating sets, and tractors of over 70 h.p. are similarly exempt from customs duties and other taxes, provided the Chilean Corporation de Fomento de la Production certifies that the end use of such items will be exclusively for agriculture and that this destination is guaranteed.

Under the 1952 Chilean Foreign Exchange Budget, by which Chile's import and exchange controls are implemented, agricultural equipment in general is grouped under the A-2 category with a quota of U.S. $1 million and the equivalent of U.S. $500 thousand in other currencies. This means that imports of agricultural machinery and implements will be licensed up to the value of U.S. $1 million from convertible currency countries during 1952. An official exchange rate of 60 pesos to the U.S. dollar applies to such imports.

Import of animal-drawn ploughs of one ploughshare into Chile is specifically prohibited under the 1952 exchange budget.

Bermuda Modifies Certificate of Origin Requirements

Government Notice No. 290 of the Bermuda Supplies Commission cancels, as from July 9, the requirement that certificates of origin should accompany invoices of all goods for which licences have been granted in dollar currency for importation from Canada and the United States. The Supplies Commission, however, reserves the right to demand a certificate of origin on any import involving dollar exchange should they deem it necessary.

(Announcement of the requirement of certificates of origin for exchange purposes appeared in *Foreign Trade* of July 19, page 21.)

The cancellation of this requirement, which was intended to strengthen control over dollar expenditure, in no way affects the need for supplying certificates of origin for the purpose of claiming tariff preference for Canadian products. Where tariff preference is not involved—for example, in the case of duty-free goods—it is recommended that all exporters follow the usual practice of typing or stamping on their invoices that the product invoiced is produced or manufactured in Canada.

Foreign Trade Service Aboard

† Indicates a change since previous publication.
Bentley's Second Phrase Code is used by Canadian Trade Commissioners.

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Territory	Officer	City Address	Mail and Cables Office Telephone
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Portugal Azores, Madeira	L. S. Glass, Commercial Counsellor	Canadian Legation, Rua Rodrigo da Fonseca 103, LISBON	*Mail:* (City Address) *Cable:* CANADIAN *Tel.:* 53117
Puerto Rico	E. Templeman, Canadian Trade Commissioner (Fisheries)	23 Clinica Miramar Apt., 604 Olimpo Avenue, Santurce, SAN JUAN	*Mail:* P.O. Box 3981 *Cable:* CANADIAN *Tel.:* Santurce 2-5626
Singapore Brunei, Federation of Malaya, Indonesia, North Borneo, Sarawak, Thailand	D. S. Armstrong, Canadian Government Trade Commissioner	Room D-5, Union Building, SINGAPORE	*Mail:* P.O. Box 845 *Cable:* CANADIAN *Tel.:* 7739
South Africa (Natal, Transvaal) Southern Rhodesia, Northern Rhodesia, Nyasaland, Portuguese East Africa, Kenya, Tanganyika, Uganda, Zanzibar	C. B. Birkett, Canadian Government Trade Commissioner	Mutual Building, Harrison Street, JOHANNESBURG	*Mail:* P.O. Box 715 *Cable:* CANTRACOM *Tel.:* 33-2628
South Africa (Cape Province, Orange Free State), Southwest Africa, Mauritius, Madagascar	K. F. Noble, Canadian Government Trade Commissioner	Grand Parade Centre Bldg., Adderley Street, CAPE TOWN	*Mail:* P.O. Box 683 *Cable:* CANTRACOM *Tel.:* 2-5134/5
Spain Balearic Islands, Canary Islands, Gibraltar, Rio de Oro, Spanish Morocco, Tangiers	E. H. Maguire, Canadian Government Trade Commissioner	70 Avenida Jose Antonio, MADRID	*Mail:* Apartado 117 *Cable:* CANADIAN *Tel.:* 21-41-13
Sweden Finland	Acting Commercial Secretary	Canadian Legation, Strandvagen, 7-C, STOCKHOLM	*Mail:* P.O. Box 14042 *Cable:* CANADIAN *Tel.:* 67-92-15
Switzerland Austria, Czechoslovakia, Hungary	Yves Lamontagne, Commercial Counsellor	Canadian Legation, Thunstrasse 95, BERNE	*Mail:* (City Address) *Cable:* CANADIAN *Tel.:* 4-59-17
Trinidad Barbados, Windward and Leeward Islands, British Guiana, Dutch Guiana, French Guiana, French West Indies	T. G. Major, Canadian Government Trade Commissioner	Colonial Building, 72 South Quay, PORT-OF-SPAIN	*Mail:* P.O. Box 125 *Cable:* CANADIAN *Tel.:* 4787
Turkey	G. F. G. Hughes, Commercial Secretary for Canada	Istiklal Caddesi, Lion Magazasi Yaninda, Kismet Han 3/4, Beyoglu, ISTANBUL	*Mail:* P.O. Box 2220, Beyoglu, Istanbul *Cable:* CANADIAN *Tel.:* 43670
United Kingdom (South of England, East Anglia, Scotland), Iceland, British West Africa (Gambia, Gold Coast, Nigeria, Sierra Leone)	R. P. Bower, Commercial Counsellor R. Campbell Smith, Commercial Secretary	Office of the High Commissioner for Canada, Canada House, Trafalgar Square, LONDON, S.W.1	*Mail:* (City Address) *Cable:* SLEIGHING *Tel.:* Whitehall 8701
United Kingdom	D. A. B. Marshall, Commercial Secretary (Agricultural)	Office of the High Commissioner for Canada, Canada House, Trafalgar Square, LONDON, S.W.1	*Mail:* (City Address) *Cable:* SLEIGHING *Tel.:* Whitehall 8701

Territory	Officer	City Address	Mail and Cables Office Telephone
United Kingdom	R. D. Roe, Commercial Secretary (Timber)	Office of the High Commissioner for Canada, Canada House, Trafalgar Square, London, S.W.1	*Mail:* (City Address) *Cable:* Timcom *Tel.:* Whitehall 8701
United Kingdom (Midlands, North England, Wales)	M. J. Vechsler, Canadian Government Trade Commissioner	Martins Bank Building, Water Street, Liverpool	*Mail:* (City Address) *Cable:* Canadian *Tel.:* Central 0625
United Kingdom (Northern Ireland)	H. L. E. Priestman, Canadian Government Trade Commissioner	36 Victoria Square, Belfast	*Mail:* (City Address) *Tel.:* 21867
United States Delaware, Maryland, Virginia, West Virginia	J. H. English, Commercial Counsellor	Canadian Embassy, 1746 Massachusetts Ave., N.W., Washington, 6, D.C.	*Mail:* (City Address) *Cable:* Canadian *Tel.:* DEcatur 1011
United States	Dr. W. C. Hopper, Agricultural Counsellor	Canadian Embassy, 1746 Massachusetts Ave., N.W., Washington, 6, D.C.	*Mail:* (City Address) *Cable:* Canadian *Tel.:* DEcatur 1011
United States (Connecticut, New Jersey, Pennsylvania, eastern New York State), Bermuda	A. E. Bryan, Deputy Consul General of Canada and Trade Commissioner	Canadian Consulate General, 620 Fifth Ave., New York City	*Mail:* (City Address) *Cable:* Cantracom *Tel.:* JUdson 6-2400
United States	M. B. Bursey, Consul of Canada and Trade Commissioner (Fisheries)	Canadian Consulate General, 620 Fifth Ave., New York City	*Mail:* (City Address) *Cable:* Cantracom *Tel.:* JUdson 6-2400
United States (Massachusetts, Maine, Rhode Island, Vermont, New Hampshire)	J. A. Strong, Consul General of Canada	Canadian Consulate General, 532 Little Building, 80 Boylston Street, Boston 16	*Mail:* (City Address) *Cable:* Canadian *Tel.:* HAncock 6-4320
United States (Illinois, North Dakota, South Dakota, Minnesota, Wisconsin, Indiana, Iowa, Kansas, Nebraska, Kentucky, Missouri)	D. S. Cole, Consul General of Canada	Canadian Consulate General, Chicago Daily News Bldg., 400 West Madison Street, Chicago 6	*Mail* :(City Address) *Cable:* Canadian *Tel.:* STate 2-7312
United States (Michigan, Ohio, western New York State)	B. C. Butler, Consul of Canada and Trade Commissioner	Canadian Consulate, 1035 Penobscot Building, Detroit, 26	*Mail:* (City Address) *Cable:* Canadian *Tel.:* WOodward 5-2811
United States (City of Los Angeles, Southern California, Arizona)	V. E. Duclos, Canadian Government Trade Commissioner	510 West Sixth Street, Los Angeles 14	*Mail:* (City Address) *Cable:* Canadian *Tel.:* VAndike 7114
United States (Louisiana, Texas, Oklahoma, Arkansas, Mississippi, Tennessee, Alabama, North Carolina, South Carolina, Georgia, Florida)	G. A. Newman, Consul of Canada and Trade Commissioner	Canadian Consulate, 201 International Trade Mart, New Orleans	*Mail:* (City Address) *Cable:* Canadian *Tel.:* RAymond 2136
United States (Northern California, Montana, Oregon, Idaho, Washington, Wyoming, Nevada, Utah, Colorado, New Mexico), Hawaii	Acting Consul General of Canada	Canadian Consulate General, 3rd Floor, Kohl Building, 400 Montgomery Street, San Francisco 4	*Mail:* (City Address) *Cable:* Canadian *Tel.:* SUtter 1-3039
Venezuela Netherlands Antilles	J. A. Stiles, Consul of Canada and Trade Commissioner	Canadian Consulate General, Edificio Pan American, Puente Urapal, Caracas	*Mail:* Apartado 3306 *Cable:* Canadian *Tel.:* 55818
Venezuela Colombia	Vice-Consul of Canada and Acting Agricultural Trade Commissioner	Canadian Consulate General, Edificio Pan American, Puente Urapal, Caracas	*Mail:* Apartado 3306 *Cable:* Canadian *Tel.:* 55818