

foreign **trade**



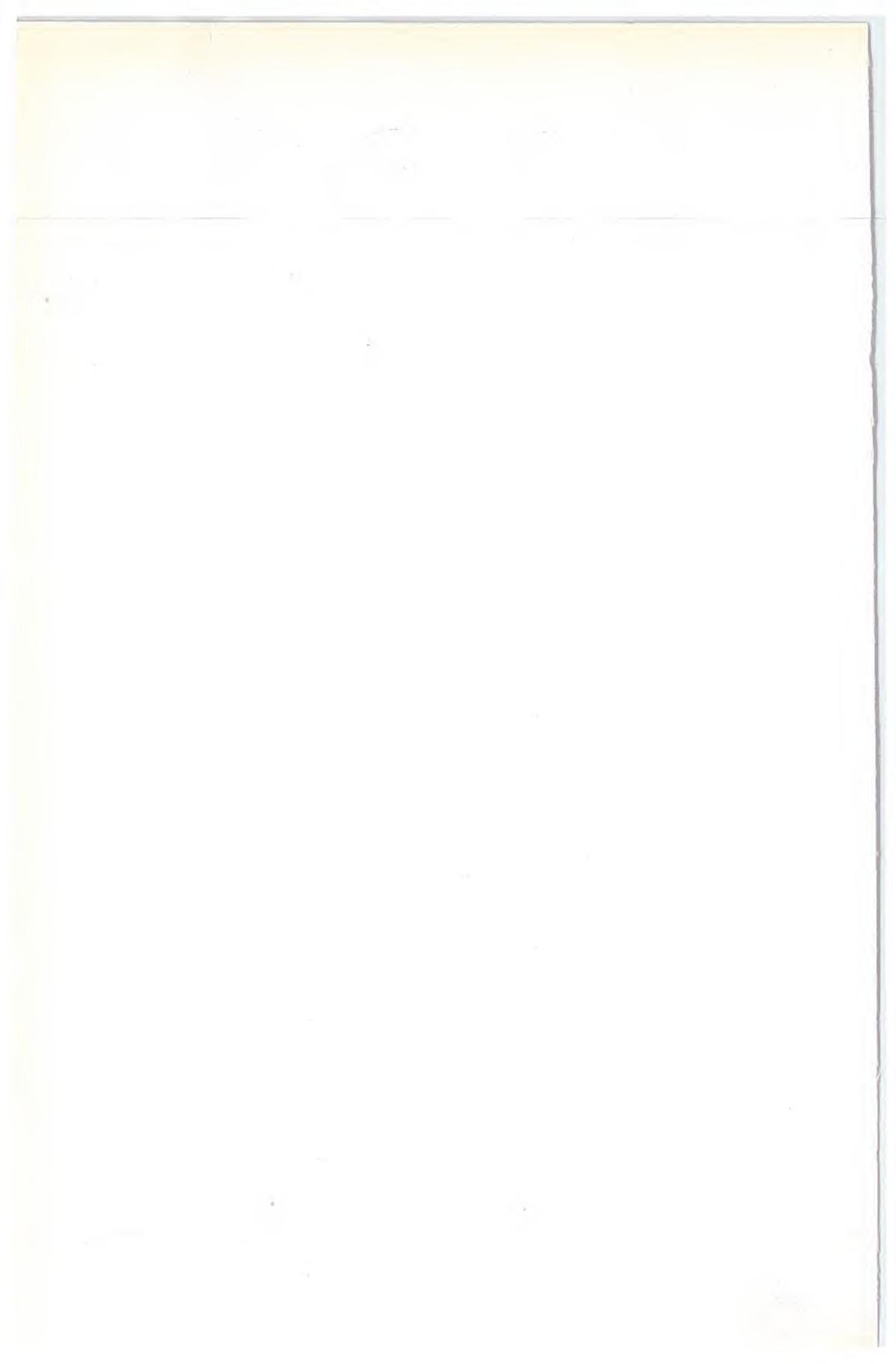
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CANADA



Queen's Island and Its Ships (page 2)





foreign trade

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COVER . . . A view of the world's largest shipbuilding yards—Harland and Wolff's at Queen's Island, Belfast, which has been awarded the contract for Canada's new aircraft carrier. For a report on Northern Ireland's important shipbuilding industry, which dates from 1636, see page 2

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Queen's Island and Its Ships

Northern Ireland's great shipyards, near Belfast, find peacetime orders flowing in; are building an aircraft carrier for the Royal Canadian Navy.

BELFAST—The history of Belfast's important shipbuilding industry goes back to 1636. In that year a wooden vessel of 150 tons register was built to the order of the city's Presbyterian clergymen. The foundations of today's great industry, however, were not laid until the early 1840's when the Belfast Harbour Commissioners, supported by local merchants, undertook the development of the port. The course of the Lagan River was changed and two deep channels were cut to give access to the port from Belfast Lough. The excavated material from one of these cuts was used to form a 17-acre island between the old river and its new course. This island was named the "Queen's Island" in honour of Queen Victoria, who officially opened the new waterway in 1849. Later the old riverbed was filled in and the island disappeared. But its name remains and is famous today as the site of the largest shipyard in the world.

Harland and Wolff

In 1854 the Belfast firm of Robert Hickson & Company began to build iron and steel ships. The Hickson yard was bought in 1858 for £5,000 by a Yorkshire engineer, Edward James Harland. Later Harland took Gustav Wilhelm Wolff into partnership and the firm became known as Harland and Wolff. From 1880 until 1935 the firm of Workman and Clark Limited was also active in the shipbuilding industry. In that year, however, their yard and works were absorbed by Harland & Wolff Limited, and now the industry is concentrated at Queen's Island. Many acres of land added to the original works have made it the largest single unit of its kind in the world, employing more than 20 thousand men and covering 240 acres.

Shipbuilding is distributed over four yards:

- Musgrave Yard, with six berths suitable for the construction of aircraft carriers and the largest passenger liners.
- Queen's Yard, with three berths for tankers and passenger vessels.
- Abercorn Yard, with five berths suitable for medium-sized passenger ships, general cargo liners, and tankers.
- Victoria Yard, with four berths, used mainly to build cargo vessels.

Large marine steam turbines and water-tube boilers, marine and stationary diesel engines and diesel locomotives—all of the most modern design—are turned out in the engine-building department. General engineering work is also done, and the electrical shops are equipped with modern facilities to produce A.C. and D.C. machinery, control gear, switch-gear, etc.

At the Sydenham works (a self-contained unit) the design, fabrication and erection of all classes of structural steelwork are undertaken.

Additional improvements made by the Belfast Harbour Commissioners in 1867 included the construction of a new graving dock and the linking-up of Queen's Island with the mainland. Thus improved and extended, the shipyard was inspected by the British Admiralty and placed on their "first class" list. Between the building of H.M. gun vessel *Lynx* in 1868 and the delivery in 1951 of H.M.S. *Eagle*, the largest, fastest and most modern aircraft carrier in the Royal Navy, the yard has carried out much important naval construction.

Many great passenger vessels have been launched from the yards. These include the *Oceanic*, built for the White Star Line in 1870, the ill-fated *Titanic*, the *Asturias* and *Alcantara*, and the various *Castle* liners. Output in recent years has included refrigerated cargo and cargo and passenger liners, oil tankers of the largest size, cross-Channel vessels, and the whale-factory ship *Juan Peron* of 32,000 tons deadweight, delivered in 1951 to the Compania Argentina de Pesca. Other famous companies with Belfast-built ships include the Union Castle, Royal Mail, P. & O., Shaw Savill, Elder Dempster, Lamport and Holt, and many of the tanker companies.

Wartime Construction

During the Second World War the company's resources were about equally divided between naval and merchant work. For the Navy, the yards built aircraft carriers, cruisers, depot ships, corvettes, minesweepers, frigates, and motor torpedo boats. H.M.C.S. *Ontario*, the first cruiser built in Belfast for the Royal Canadian Navy, was commissioned in 1945. Between September 1939 and October 1945, 54 merchant ships, with a total gross tonnage of 441,280, were completed.

Despite the heavy damage to machinery and buildings by enemy air raids in 1941—about 60 per cent of Queen's Island was wiped out—production remained high and reconstruction and repairs were speedily carried out.

In 1950, eleven ships of 131,720 tons were launched from the yards; in 1951, ten ships of 118,554 tons. The number of new contracts is satisfactory and there is a possibility that production this year will reach 150 thousand tons, but much depends upon the allocation of steel.

Aircraft Carrier for Canada

Harland and Wolff were recently commissioned to build an aircraft carrier for the Royal Canadian Navy. This is intended to replace the carrier *Magnificent*, loaned to Canada by the Royal Navy. The new ship will cost more than \$20 million and will be a so-called "light" carrier of about the same tonnage as *Magnificent*. It will have the latest devices for handling jet aircraft, as well as radar and submarine-detecting equipment.

The industry has made a good adjustment to peacetime conditions. The experience gained during the war years has resulted in many improvements in production efficiency and techniques, and the yards are better equipped and more efficient today than at any time in their history.

—H. L. E. PRIESTMAN
Canadian Government Trade Commissioner

Tangier: Businessman's Utopia

With no income tax, import or exchange restrictions, business booms in this International Zone--and luxury articles find a ready market.

MADRID—Tangier is almost a businessman's Utopia. There are no income taxes; the few other taxes are moderate; exchange and import restrictions are unheard of, and customs duties are a straight 12·5 per cent ad valorem for most goods. World currencies can be bought or sold in its money market.

Tangier lives on its transit trade and the financial services it provides. It is also a haven for flight capital. There is no industry to speak of in the Zone and its fortunes rise and fall with the severity of unsettled political problems, taxation, currency and trade difficulties in other countries. As one might expect, Tangier has been booming since 1945. There are now signs that activity is levelling off, principally because of better economic conditions in Spain on which it depends for much of its livelihood.

Population and Government

The International Zone, which covers an area of 144 square miles, has only the one city, Tangier, with a population of about 139 thousand. This total is made up of 86 thousand Moslems, 8,000 non-Moslem Moroccans, 25 thousand Spanish, 9,250 French, 2,000 Belgians, 2,000 Italians, 1,500 British and 5,250 other nationalities. The Zone is governed by an Administrator appointed by the Board of Control. The Board is composed of the Consuls General of the countries signatory to the Act of Algeciras, by which the Zone was created. The present Administrator is Belgian.

Port facilities are inadequate. There is room for only one, or perhaps two, deep-sea ships to come alongside. A new jetty for deep-sea ships is under construction, a cold storage warehouse was recently completed and several storage sheds are being built. There is a free port area.

Transit Trade

A large volume of goods enters the free port area in transit. No records of these are kept but it is estimated that more than 50 per cent of goods shipped to Tangier are re-exported. The bulk of the products passing in transit are luxury items from the United States. Cigarettes and nylon stockings are the leading commodities in this trade.

In 1951, Tangier exported goods to Spanish and French Morocco valued at \$2,998,115 and imported goods valued at \$4,203,205. Imports consisted chiefly of goods from Morocco—vegetable fibre, fresh eggs, canned fish, fresh vegetables, and dairy produce. Exports were mainly luxury goods of foreign origin passed through the Tangier customs. This trade was in addition to goods shipped in and out of the Moroccos and passing through Tangier. No records of these are kept.

According to Tangier Administration statistics, 165,752 metric tons of goods valued at \$26,883,897 were entered through the customs in 1951. Exports amounted to 15,721 tons valued at \$1,937,147. (These amounts do not include transit and interzonal trade.) The wide gap between the value of exports and of imports was balanced by currency movements, either legal or clandestine. A fair percentage of goods which have been passed through the customs later leaves the Zone as exports or in the form of purchases made by visitors—some 211 thousand in 1951.

The United States was the principal exporter to Tangier in 1951, followed by Spain, France and the United Kingdom. Canada was seventh on the list. United States shipments were valued at \$6,076,385; the main commodities were cars and trucks, rayon textiles and nylon hosiery, vegetable oil and antibiotics. Shipments from Spain and France were valued at \$4,717,195 and \$3,975,635 respectively, United Kingdom exports were valued at \$2,753,010. Gold bullion was an important item in the French and U.K. export lists. It is interesting to note that Britain shipped 610 tons of laundry and toilet soaps worth \$168,077. Canadian exports amounted to 5,624 tons valued at \$794,357, and wheat flour accounted for a high percentage.

Tangier as a Market

Moslems form about 60 per cent of the population and in general have low incomes and are relatively unimportant consumers. The remaining 50 thousand inhabitants, mostly European, are the real consumers in the Tangier market. To their requirements can be added the demands of the over 200 thousand visitors passing through the city each year. These visitors usually are domiciled in countries where there are rigid import controls and they take the opportunity to stock up with luxury articles.

Because it is small and compact, the Tangier market does not need the services of distributing organizations at the wholesale level. The large retail merchants either import directly from overseas suppliers (with whom they may or may not have exclusive connections) or they place orders with local agents of these suppliers. In some lines of goods, particularly foodstuffs, retailers purchase from the stocks of importer distributors. Importer distributors seldom buy through local agents of overseas suppliers; they prefer to have their own connections abroad.

Since there are no import or currency restrictions, Tangier merchants have the whole world at their feet when exercising buying preferences. Price, quality and brand name are all, in consequence, important. In luxury articles brand is even more important than price or quality, and products without international reputations do not stand a chance. This also applies to luxury articles moving through Tangier in transit. Other brands which are just as good, perhaps cheaper, but comparatively unknown are ignored. In the more basic items, such as margarine, laundry soap, and flour, price and quality are the ruling factors. If these are favourable a single brand can capture the market. For instance, a Dutch manufacturer appears to supply all Tangier's needs in margarine, and an English manufacturer in laundry soap.

—E. H. MAGUIRE

Canadian Government Trade Commissioner

✓ New Zealand's Trading Position

The system of exchange control, introduced this year to cut imports, is beginning to work; production is holding up well; but conserving dollars still remains a difficult problem.

WELLINGTON—The sterling crisis and New Zealand's balance of payments troubles dominated the economic scene during the first half of 1952. On March 11, the Prime Minister announced that New Zealand had undertaken to create a surplus of £25 million with non-sterling countries for the twelve months ending June 1953. He added that no general licensing of imports from the sterling area countries or from European Payments Union countries was considered necessary, but the import of motor cars from all countries would be controlled. All licences issued for imports from schedule countries (mainly the U.S.A., Canada and Japan) were cancelled and fresh licences would be required for all future imports.

Unforeseen difficulties at once developed and a number of exceptions had to be made, whereby licences were automatically revalidated. As the licences were well screened before they were issued, opinion was that no great volume of trade from Canada would be affected. The situation remained chaotic for some time and is still not fully clarified. Many licences have been re-issued, some have been cut, and others refused. Decisions are still pending on others.

Drastic Action Needed

In the meantime, the New Zealand balance of payments situation deteriorated rapidly. Wool prices fell, goods became more readily available from sterling countries, and private importers placed large orders for all types of products. Politically, the re-imposition of import controls was not acceptable. The Reserve Bank therefore announced a scheme of exchange control under which importers would be limited to 80 per cent of the amount of exchange which they bought from their trading banks in 1950. For additional requirements, permission from the Reserve Bank was needed.

Each importer had to lodge an import program with his trading bank by April 24, 1952. Some importers had already overspent; others decided to cancel orders. Because of the loss of other sterling markets, many United Kingdom manufacturers shipped well ahead of schedule. Warehouses became full. Gradually the necessary procedure for handling these applications is being worked out and most of the goods imported will be of use to the country.

The following figures show that drastic action of some kind was imperative. In the year ended June 30, 1952, New Zealand had a deficit of £51.3 million in her overseas payments, contrasting with a surplus

of £39.1 million for the year ending June 30, 1951. Payments in the year ended June 30, 1952, totalled £316.6 million—an increase of £112.5 million over the total for the previous June year of £204.2 million.

The sharpest increase was in payments for non-government imports, which rose by £101.1 million to the record figure of £249.2 million in the June year recently ended, compared with £148.3 million the previous year. Receipts for exports rose by more than £22 million, a decline of £20 million in wool receipts being more than offset by increases in the income derived from New Zealand's other exports.

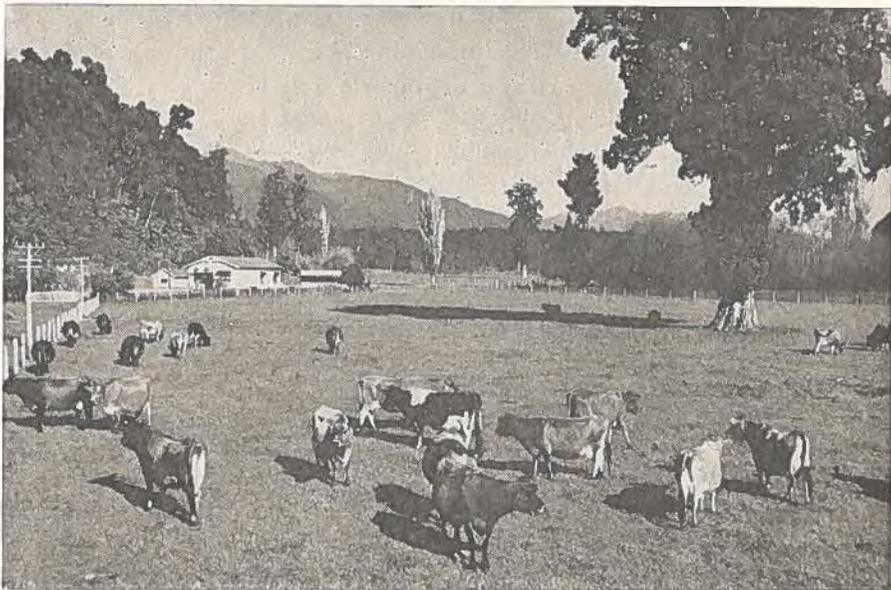
Following the Government's announcement that interest rates would not be increased and that control over capital issued would be tightened, yields on long-term government stock declined from about £3.17.6 to about £3.11.3. This level was maintained through April and May but there was some weakening at the end of May. Share prices have also improved from their February low, but the market is still uncertain.

The demand for long and medium-term capital remains good as higher prices, larger stocks and higher bank credit force firms (many of them under-capitalized) to seek finance from the market.

The Consumers Price Index again rose during the March quarter, although the rate of increase appears to have slowed down. The 16-point rise since December compares with rises of 30 points in the fourth quarter of 1951, 38 in the third, 48 in the second, and 16 in the first quarter.

Locally produced items in the wholesale prices index fell slightly during January and February but this fall was outweighed by increases in the imported items index, which rose 2.5 per cent in February and 3.3 per cent in January.

The export prices index for the December quarter was 5 per cent higher than in the September quarter but should decline again in the March quarter because of the fall in wool prices.



Dairy production in New Zealand during the first half of 1952 showed a sharp decline, largely because dry weather during April and May had a bad effect on pasturage. Prospects for winter feed supplies are good.

Climatic conditions were favourable for pasture in March but dry weather persisted in several areas during April and May. Although production up to the end of May was 2.3 per cent higher than for the same period last season, dairy production has shown a sharp seasonal decline. Prospects for winter feed supplies are better than last year. Meat killings are larger than last season but below the 1949-50 level. Shipping difficulties have slowed up killing at some works and an extended season is likely.

Timber and Coal Production

For the year ended March 31, timber production in New Zealand was over 575 million board feet. This was a record, and almost 50 million board feet more than was produced in the previous year. The increased production of timber has made it possible to do away with the subsidy on overtime pay in sawmills. Because of the restricted buying in Australia and the falling-off in local demand, over-production has developed. Stocks of imported timber are large and, although dollar licences have been cut, they appear sufficient to take care of requirements.

New Zealand's coal production last year was the lowest for any year since 1939, mainly because of the coal field strike at the time of the waterfront dispute. The figures show that 2,425,683 tons of coal were produced from underground and opencast mines last year, compared with 2,669,451 tons the year before. In spite of the fall in production, supplies are adequate to meet consumer demand.

Import Schedule

The import licensing schedule for 1953 was issued at the beginning of August and reflects few changes from that of 1952. The general policy is still to protect New Zealand industries, but licensing of goods from dollar countries and licensing of motor vehicles from all sources to save exchange were important considerations in drawing up the schedules.

Licences for these two classes of imports will be carefully screened in relation to the supply of overseas funds, and the Reserve Bank will provide the full amount of exchange under current licences, subject to the right of the Reserve Bank to spread allocations at its discretion. Other licences will not carry an assurance that exchange will be provided and allocations will, therefore, be made only if and to the extent that exchange is available.

It must be realized, however, that New Zealand importers are keen to maintain their close contacts with Canada. They have done an excellent job for their Canadian principals under difficult conditions. On the other hand, the Government has taken what it considers its obligation to the sterling area seriously. Some of the scarce goods scheduled from dollar areas are now available from soft currency areas. In fact, surplus stocks have been accumulated in a number of such lines and it will thus be some time before the New Zealand trading position clears up. The sterling question will continue to be the uncertain feature in an otherwise fairly sound economy.

—P. V. McLANE
Commercial Counsellor for Canada

Canadian Barley Finds a Market in Japan



TOKYO — Traditionally, barley has formed an important part of the Japanese diet. Consumption began to fall in 1915, however, when the standard of living rose, and rice and wheat gained in popularity with the Japanese people. However, in the past few years the consumption of barley has increased substantially and is now estimated at three times the prewar level. Domestic production of barley which, as a crop, ranks next to rice in importance, established a 30-year record in 1951. Even so, production could not meet demand and had to be augmented by large imports.

Imports Increasing

Before the war Japan's barley imports were negligible and the small quantities which did enter the country were used for malting. Rice requirements were easily met and local production provided all the barley needed. The first barley imports were made early in the occupation period and came from the United States. Imports from the U.S. in 1947 and 1948 totalled 193 thousand metric tons and 168 thousand metric tons respectively. Several other countries participated in the trade in 1949, including Iraq, Australia, Algeria, and French Morocco. Canada sent her first shipment of barley to Japan in 1950 and in 1951 sales of Canadian barley in the Japanese market increased sharply. The trade considers

Japanese Imports of Barley

Country	(In metric tons)		
	1951	1950	1949
United States	669,913	79,402	371,606
Canada	123,762	12,049	.....
Australia	110,659	26,062	.....
Iraq	47,176	69,572	60,462
Tunisia	8,500	.....	.....
Argentina	5,385	26,227	.....
Others .....	.....	46,471	9,137
Total	965,395	259,783	441,205

the Canadian product competitive both in quality and price. This is good news in Canada today, with the West expecting a record barley harvest of 280 million bushels.

Private Firms Import

Purchasing of imported barley is controlled by the Food Agency of the Department of Agriculture and Forestry. Tenders are called for at frequent intervals throughout the year and private Japanese trading firms, many of them specialists in the grain trade, submit bids. Private trading firms, not the Government, carry on negotiations with foreign suppliers. The Food Agency sells the barley to processing firms which in turn sell to consumers through normal trading channels. The farmers now offer locally grown barley directly to barley processors. Throughout the war and during most of the occupation, barley processing and sales were controlled by the Government.

Faced with a shortage of cheap staple foods in recent years, the Japanese Government has, with considerable success, encouraged farmers to increase their barley production. Output in 1951 was 87.9 million bushels, compared with 78.9 million in 1950. A five-year program to increase rice and barley production by 18 per cent has been instituted by the Government to meet the growing demand for staple foods from Japan's steadily increasing population.

Japanese Barley Production

Year	Acreage	Crop (bushels)	Yield per acre (bushels)
1948	2,114,228	56,778,608	26.9
1949	2,482,708	80,749,296	32.5
1950	2,520,903	78,915,088	31.3
1951	2,418,358	87,957,168	36.0

The 2.3 million acres sown to barley in 1952 was 4 per cent less than in 1951—the result of poorer weather, anticipation of a price decline, and the Government's decision to decontrol barley.

Japanese barley is usually sown in rows; spot sowing is done only rarely. The fields have an orderly appearance, the rows are uniformly nine inches apart and four to five inches wide at the base. At the harvest the barley is cut by hand, tied into bundles and dried in the sun. It is then threshed and winnowed several times by sieving. These processes are largely carried out by hand but the use of electric threshing machines is increasing.

Two Types Grown

Two types of barley are grown: ordinary, largely confined to the northern sections of the country, and skinless or naked barley, grown mainly in the south. There is no essential difference between ordinary and naked barley, but the husks of the skinless variety are easily detached from the grain after drying and it does not need hulling. Fifty per cent of the ordinary barley and of the naked barley is grown in rice fields as a winter crop. Naked barley is much more susceptible to cold than ordinary barley and production is therefore confined to the area lying south of the Kanto plain where Tokyo is situated. The winter climate in Japan's northermost island of Hokkaido is too cold for barley and sowing takes place in the spring, with harvesting in the summer. Spring barley is generally inferior in quality and yield to autumn barley.

Barley mixed with rice is one of Japan's popular staple foods. It is also used for brewing and for the manufacture of confectionery and soy-bean paste which provides the base for soup, a popular dish. Barley by-products include bran for cattle and poultry feed, raw material for bean paste, and seed germ for oil extraction and medicinal purposes. Domestically grown barley, which the brewing industry generally uses, is expected to produce 60 million gallons of beer in 1952.

The Japanese barley processing industry has grown steadily since the beginning of the occupation. The present consumption of rolled barley is estimated at one million tons, three times the prewar level. Processing capacity is placed at two million tons, more than sufficient to meet the present demand. The barley processing plants produce a type of pressed or rolled barley which, mixed with rice, provides a boiled grain food highly palatable to the Japanese. In addition, rolled barley contains protein and vitamin B, lacking to some degree in rice, and thus balances a straight rice diet.

—J. C. BRITTON

Commercial Secretary for Canada

Canada's Trade with Ceylon

COLOMBO—Canadian exports to Ceylon usually fall far below Canadian imports from that country. The reason is a simple one—Ceylon has always been an important supplier of such important products as tea, rubber and coconut. In 1950 and 1951, for example, the value of Ceylon's exports to Canada was approximately four to five times as large as the volume of Canadian sales to Ceylon.

However, during the first six months of 1952 Ceylon's trade with Canada has shown a different trend—an encouraging one for Canadian exporters. During this period, Canadian products going to Ceylon totalled Rs.23,414,000 compared with Rs.5,184,000 in the same period in 1951, an increase of over 400 per cent. This means that Canada is becoming more important to Ceylon as an overseas supplier, and also that the trade between the two countries is closer to balance. (In certain years, the ratio between Ceylon's exports to and imports from Canada has been as high as three or four to one.) Ceylon's exports to Canada declined from a value of Rs.45,032,000 during the first six months of 1951 to Rs.35,135,000 in the same period this year.

During the period January-June 1952, the value of practically all imports into Ceylon of any consequence increased. Among the Canadian commodities showing substantial rises are flour, fish, lumber, agricultural machinery, newsprint and other papers, motor vehicles and parts, batteries, tires, and clocks and watches. The only notable decrease was milk foods.

Study of Ceylon's exports to Canada shows that the trade in tea has been maintained at even levels and exports of desiccated coconut increased. On the other hand, quantities and values of rubber and coconut oil exports to Canada decreased sharply.

—PAUL G. SYKES

Canadian Government Trade Commissioner

Transportation Notes

CEYLON

Parcel Post from Canada—The parcel post route from Canada to Ceylon via Vancouver and Hong Kong has been discontinued by the Canadian Post Office because of delays in transmission. In future, all parcels from Canada for Ceylon are to be forwarded to "Montreal British & Foreign" for onward despatch via England. The following parcel post rates, currently in effect, will apply:

1 lb.	\$.65	6 lb.	\$1.70
2 lb. ....	.80	7 lb.	1.80
3 lb.	1.35	8 lb.	2.45
4 lb.	1.45	9 lb.	2.60
5 lb.	1.60	10 lb.	2.70

CHILE

Service to Brazil—The Aerovias Brasil Company of São Paulo will inaugurate an air service to Chile in September. Details of the proposed route have not yet been announced—Santiago, August 28.

INDIA

Railway Coaches Ordered—The first samples of 100 railway coaches, ordered from a Swiss firm in 1950, have now been received and two of them have been on view at New Delhi railway station. These all-metal lightweight coaches will be gradually introduced into service. An order for 250 metre-gauge coaches of the same design has also been placed with an Indian firm, and a factory will shortly be set up in Madras to produce 350 a year. Plans are to replace gradually all wooden-body carriages now on the Indian railways—New Delhi, August 15.

Locomotive Works—The locomotive manufacturing workshop of Chittaranjan in West Bengal, India, was started early in 1948 and is now almost completed. Total estimated cost is Rs.105 million and the estimated annual production capacity is 120 locomotives and 50 spare boilers on single shift working. This target, it is expected, will be attained in 1956. When fully developed, this factory will be the largest manufacturing unit of its kind in Asia—Bombay, August 15.

JAMAICA

New Steamship Service—Saguenay Terminals recently began a steamship service from Eastern to Western Canada, calling at certain Caribbean ports. Previously service was only between Eastern Canada and the Caribbean. The new service is monthly and is provided by two 10-thousand ton freighters with limited passenger accommodation. Leaving from Halifax or Montreal, they go to Kingston, Port Limon and Cristobal

in that order, and then through the Panama Canal to Los Angeles and Vancouver. On the return trip they call at all these ports except Los Angeles—Kingston, August 28.

JAPAN

Port and Harbour Conference—An International Port and Harbour Conference will be held at Kobe in October. Delegates from Port Associations or similar organizations in 19 countries are expected to attend the conference, which coincides with the thirtieth anniversary of the Japan Port and Harbour Association—Tokyo, August 30.

NEW ZEALAND

Control of Airways—The Government has decided that the existing system of corporation control of the National Airways Corporation is to continue. The Minister of Civil Aviation said that no suitable applications were received when the Government made its original offer to sell the Corporation to private investors, nor had it been possible to arrange a mutually acceptable method of joint management and ownership—Wellington, August 25.

Railway Report—The recent report of the Royal Commission on the New Zealand Railways recommended that the railways be managed by a corporation, which would take over, manage and develop the railways system and its subsidiary services.

The report describes the general state of transport in New Zealand today as "chaotic" with much unnecessary duplication and says that the public has to pay too much in transport charges. It expresses concern at the shortage of staff in the railways department and suggests incentives to attract workers to the service and encourage them to remain in it. It recommends recruiting immigrants, the provision of better housing and other accommodation, and incentives to those who would make a career in the department. Other recommendations in the report cover the discontinuing of uneconomic routes, overhaul of the refreshment services, and the need for local bodies to bear a share of the costs of suburban services—Wellington, August 25.

PORTUGUESE EAST AFRICA

Port Facilities Improved—Construction of a new pier at the Port of Quelimane in Portuguese East Africa, north of Beira, is expected to be completed about the end of this year. The pier is 120 metres long and 15 metres wide and will have railway facilities. In addition, trucks will be able to drive alongside ships for loading and unloading. It is reported that some electric cranes will be transferred from Lourenço Marques to Quelimane. With the completion of this new pier at Quelimane, the pressure on the port of Beira should ease considerably.

Israel's New Economic Policy

Intended primarily to step up production, encourage exports, the policy has met unexpected difficulties which have retarded progress.

ATHENS—Israel's economic outlook at the beginning of 1952 gave its Government cause for concern. The trading deficit totalled \$225 million, with exports covering only 13·6 per cent of imports. This deficit had to be made up by foreign grants, contributions of international Jewry, loans and credits, transfers of gifts, capital and personal effects of immigrants. Dollar purchases were restricted to essentials unobtainable elsewhere. Bilateral barter trading was carried on in an endeavour to obtain essential supplies and, at the same time, find an outlet for the sale of Israeli products.

Among the pressing problems, the following loomed large:

- High production costs, because of high wages, some inefficiency of labour and machinery, irregular supplies of raw materials.
- Too-high prices for Israeli products on world markets, a result of the high production costs.
- Friction between manufacturers and the government-supported General Federation of Labour (Histadrut).
- Enforcement of price controls on manufacturers of goods (especially for export) which, added to rising raw materials prices and new wage claims, cut down the incentive to produce for export; encouraged black-market activities.
- The policy of unrestricted immigration, which more than doubled the population of Israel in just over 3½ years. This, through stark economic necessity, has been changed to selective immigration.

Against the official rate of \$2.80, the Israel pound was quoted as low as 30 cents on the free market, both at home and abroad, while the gold sovereign was as high as I£ 38·400 on February 7th. On the same date, the foreign currency cover was as little as I£ 1·76 million.

The New Economic Policy

Faced with this dismal outlook and in an endeavour to bring some kind of order out of economic chaos, the Government, on February 13, introduced a series of economic and fiscal reforms designed to stabilize the currency and encourage exports. The Prime Minister defined the three basic problems as the curbing of inflation, encouraging the flow of investment capital, and increasing productivity.

Vital part of the new policy was the introduction of multiple rates of exchange to encourage investment and increase exports. Second, to support the export drive, wage levels, it was recommended, should be based on production norms and premiums and wage increases should, on the whole, depend upon increased output. Histadrut and the Manufac-

urers' Association reached agreement on the establishment of efficiency production boards. The establishment of an Economic Advisory Council, an Export Institute and an Export Bank was proposed, to encourage, assist and facilitate the export drive.

To curb the inflationary trend, the Prime Minister reiterated his pledge that no more Treasury Bills or Land Bonds would be issued and that there would be strict control of credit to unessential industries, with priority given to those likely to increase agricultural and industrial production. Budgets, previously largely financed by loans, would in future be covered by internal revenue.

Briefly, the main points of the new economic policy were as follows:

- The current exchange rate of \$2.80 retained for purchases of wheat and other essential foodstuffs.
- The rate for tourists, fund-raising institutions, diplomats, set at \$1.40 to the pound. This is also the rate for the import of meat, fish, coffee, tea, pharmaceuticals, seeds and fertilizers.
- Rate for investors, \$1 to the pound.
- Investors not henceforth required to turn over to the Treasury a dollar at the official rate of exchange for every dollar's worth of non-payment imports.
- Exporters allowed to retain part of proceeds of foreign currency from overseas sales for the acquisition of raw materials; also permitted to bring in raw materials as non-payment imports.
- Cost-plus system of calculating prices dropped. Prices fixed to allow greater profits for more efficient enterprises.
- Raw materials distributed according to the efficiency of the enterprise.
- Preference given to import of essential foodstuffs and items needed for food production and agricultural expansion, e.g., pipes, fertilizers, seeds, etc.
- Majority of exports at the third rate of exchange (\$1 to I£1).

Achievements

It is not yet known whether one of the main purposes of the policy, the expansion of exports, has been achieved. Certain developments made it difficult to bring export prices down. One was the decision of the authorities to value manufacturers' inventories at new import prices and collect the difference as a surcharge. Another was the breakdown of the proposed wage-freeze. Wages are pegged to the cost-of-living index, which has risen every month since the new economic policy was introduced. A third was the difficulty in ironing out the many wrinkles which appeared after the reforms were introduced. These have all but offset the exchange advantage granted to Israeli exports.

The cost of living has shown a sharp increase following the doubling and trebling of prices for imported products. By the end of April it stood at 144, compared with 120 in February and 100 in September 1951. Wages have followed suit. Though Histadrut promised to hold wages in check if everyone else did the same, its efforts have not been successful. Manufacturers must try to foot the mounting wage bill and, at the same time, keep the prices of their products stable to combat inflation at home and to compete abroad.

Despite the promises not to issue further Treasury Bills, the amount in circulation had risen by June 4 to I£38.3 million, while the total currency circulation had increased to I£115.5 million. However, as an anti-inflationary measure, and to help finance development projects, on June 8 a compulsory loan of 10 per cent, both on notes and on bank deposits, was introduced. This coincided with a new issue of banknotes and exchange of these for old notes on the basis of one to one.

Production Problems

Because of lack of foreign exchange to make purchases and general shortages on the world markets, raw material shortages in Israel during the past twelve months have been steadily throttling industrial production. A number of key enterprises have closed down completely and many others, including basic textile, metal and rubber plants, have been compelled to lay off workers and reduce output. Higher prices for raw materials and continuous wage adjustments have aggravated the problem.

Despite these setbacks, however, there has been a fair amount of industrial expansion in all branches, though whether production can be maintained and new enterprises started is another question. The inauguration of an assembly plant for trucks, two rubber tire plants, and the development and expansion of the local chemical and fertilizer industry using Israeli mineral resources have marked the last few months. Agriculture has made generally good progress and crop prospects are bright. This helps to relieve a somewhat dark picture.

—T. J. MONTY

Commercial Secretary for Canada

CHILE BUYS CANADIAN BULLS

The first shipment of Canadian cattle to leave for South America since the foot and mouth outbreak last February took to the air at Malton Airport Sept. 8. Eleven richly bred Holstein bulls, including the Junior Champion at the recent C.N.E., made up the cargo. The bulls, including one from the U.S., were purchased for the Institute of Inter-American Relations by Ismael Jordan of Santiago. Assisting in making the selections was Dr. Guillermo Gomez, head of the Animal Husbandry Department of the Chilean Ministry of Agriculture.

Five head came from Rosafe Farms, Brampton, Ont.; two each from J. J. E. McCague, Alliston, Ont. and Hays Ltd., Oakville, Ont.; and one each from G. Leslie Peer & Son, Milton, Ont., and Butterfly Farms, Mexico, N.Y.

The flight marked the first time that a Chilean plane, either commercial or military, has visited Canada. In fact, it was the first South American commercial plane to pick up a cargo at Malton for several years.

CLOSE ISTANBUL OFFICE

The Trade Commissioner Service has decided to close its office in Istanbul, Turkey, on September 30.

Commodity Notes

BRAZIL

Rubber—Over one million rubber trees are ready for tapping on the Northern Agronomic Institute's Belterra plantations in the Amazon Basin. The plantations now contain 2.5 million trees, only a few of which have been tapped, because of the scarcity of labour. Brazil's rubber production totalled 11,914 tons during the first quarter of 1952, a 24 per cent increase over the same period last year—Rio de Janeiro, August 30.

Castorseed—All old stocks of castorseed have now been disposed of, it is reported, and the new crop (which is expected to be small) has started to come in. Since demand from the oil factories and abroad is good, the crop is not expected to meet the demand—Rio de Janeiro, August 30.

CHILE

Sulphite—The new sulphite plant being constructed by the Chilean Exploration Company in Chuquicamata is now partially in production, it is reported. At present, production is by superficial development of the oxides, but will be progressively increased as the construction (ultimately to cost US\$100 million) is completed—Santiago, August 13.

COLOMBIA

Bicycles—The first bicycles made in Colombia are now being produced in Cali, fourth largest city of the Republic. The operation is basically one of assembly. Some months ago the company "Monark de Colombia, S.A." was formed and capitalized at 750 thousand pesos. A large percentage of the stock was taken up by Swedish interests with the purpose of duplicating the Swedish "Monarch" bicycle. Because it has the advantage of tariff protection, the plant is expected to prosper and eventually to export to Ecuador and Venezuela—Bogotá, August 18.

FRANCE

Haute couture—French fashion designers are to receive 400 million francs in subsidies to help combat rising costs of materials and overhead. Firms such as Fath, Dior and Schiaparelli—if they use at least 90 per cent French textiles, present sixty models during the season and employ thirty permanent workers—will receive assistance up to this amount. Three-quarters of this sum is contributed by the "Fund to Encourage Textile Production" (publicly financed), and the rest by the Textile Manufacturers Association—Paris, August 7.

INDIA

Machine Tools—Value of India's annual demand for machine tools is roughly estimated at Rs.100 million (one rupee equals 22 cents Canadian), and the present production hardly satisfies 3 per cent of the country's

requirements. The Government of India has decided to set up a machine tool factory at Jalahall near Bangalore, and has completed preliminary stages such as entering into agreements to obtain equipment. The annual value of the output of the factory, when it reaches full production in 1955-56, is estimated at Rs.40 million—Bombay, August 10.

SOUTH AFRICA

Cotton—South African cotton-growers have this year harvested the biggest crop in the history of the country, officially estimated at 31 million lbs. of cottonseed. The previous record, which has stood for 25 years, was 24 million lbs. Good prices in the last few years have encouraged farmers to cultivate cotton. If the present prices are maintained, cotton farmers will realize £1.6 million for this year's crop, which is now arriving at the ginneries—Johannesburg, July 18.

Canned Goods—According to the Chairman of the Industrial Development Corporation, the value of canned goods exported from South Africa last year was £9 million. The United Kingdom was the Union's biggest customer, taking about two-thirds of the total exports. Other important customers were the Rhodesias, Malaya, Canada, the United States, Belgium, Eire, Ceylon, Israel and France—Johannesburg, July 18.

SWEDEN

Cellulose—Because of the uncertainty of the cellulose market, the Swedish Cellulose Company (incorporating nine industrial concerns) has decided to limit production at a number of their factories. Unless sales soon improve, storage space will be insufficient for full production—Stockholm, July 24.

UNITED STATES

Broilers—In a country whose annual consumption of poultry is 31 pounds a person, compared with 72 pounds of pork and 56 pounds of beef, the production and sale of broilers has shown a remarkable increase since the war. According to the Federal Reserve Bank of Atlanta, which serves the 6th Federal Bank District of Tennessee, Georgia, Alabama, Mississippi, Louisiana and Florida, there has been a 220 per cent increase in broiler output in this district in the past five years—148 million in 1951, compared with 45.2 million in 1945.

The expansion of the industry has been aggressively financed by feed dealers backed by their feed companies. The feed dealers operate under contract in which the grower and representative of the feed company have well-defined responsibilities. The feed dealer supplies the chicks, feeds, and medicines on credit, and assists in marketing the broilers. The farmer furnishes housing, equipment, fuel, litter and labour. There has been evidence in recent weeks of over-expansion, and a need for greater stability in the industry. But if high prices for meat hold, the industry is likely to continue operating on a large scale. This development is of interest to Canadian exporters as a potential market for such poultry feeds as fishmeal—New Orleans, August 7.

Mozambique's Exchange Problems

JOHANNESBURG—The outstanding economic developments in Portuguese East Africa during the past twelve months have been the sharp drop in dollar earnings and the very large favourable balances established with countries within the European Payments Union. Both have caused the exchange control authorities considerable anxiety and have made the adoption of control measures necessary.

Import Control

Lower sales of tea and sisal to American buyers were largely responsible for the serious decline in dollar receipts. This dollar shortage has brought Mozambique to the point where it has had to reduce imports from hard currency areas to the absolute minimum. In effect, the tightened control permits only strictly essential goods and materials not available from soft currency areas to enter. In 1951 and previous years, definite allocations of dollars were granted and gazetted to purchase a reasonably wide range of Canadian and United States products, with emphasis on essential and non-luxury items. No schedule of dollar allocations has been drawn up for 1952. Instead, import permits are being granted on an *ad hoc* basis and only after the closest examination of the supply position, the degree of essentiality, etc., for each product. Imports from the United States and Canada are thus being confined to minimum quantities of wheat, agricultural implements, motor cars and trucks, chemicals, drugs, timber, and a few other essentials that can qualify for a permit.

Export Control

Measures to control exports of the Colony's produce to countries within EPU—the result of much increased favourable trading balances—were first taken in February last, when all exports to those areas were prohibited. Later the prohibition was altered to apply only to sisal, copra, tea, wax and timber.

A further decree allowed the export of the above products to EPU countries to the extent of 70 per cent of the 1951 value. Any trade over this figure incurs a penalty of 30 per cent of the excess. This amount is frozen and the exporter cannot use it.

Another form of export control recently adopted was a tax on excess income, designed to force exporters to return to the Colony all proceeds of sales, rather than maintain a percentage in foreign accounts. The law is that 85 per cent of the difference between the 1949 price and the 1952 price (as quoted in London or New York) for copra, sisal, cashew nuts and cottonseed is to be taken by the Government and used generally for the benefit of each separate industry.

All these changes indicate that the authorities feel somewhat confused over the situation. The control of imports from dollar sources, however, causes no hesitation or indecision. The policy is to prohibit or cut imports to the bare minimum.

General business conditions in Portuguese East Africa have been good during the first five months of 1952. The demand for goods is firm; imports have been sufficient to enable merchants to meet most requirements. There has been, however, some dislocation on the export side as a result of the dwindling American markets for tea and sisal and the restriction on exports to EPU countries. Nevertheless, the ports of the Colony continue to record fair tonnages of general cargo and substantial quantities of tea, vegetable oils, copra, cottonseed and timber, destined for Europe and South Africa. The cashew nut trade with India is being maintained satisfactorily.

Oil expressers and soap manufacturers—who experienced a bad year in 1951 because of lack of primary products, particularly ground nuts and mafurra—are optimistic this year. Good crops of these products seem assured.

Second plantings of maize and rice have done well and good yields are expected. The food outlook is therefore much brighter than it was earlier in the year.

Port Facilities Improved

Throughout the past twelve months, the congestion that developed in Lourenço Marques from time to time was never very serious. Today the port can be described as operating normally. The arrival of six or seven ships at the same time, of course, causes delays but such delays are slight compared with those experienced at Beira until recently. Lourenço Marques is soon to receive 100 new trucks for harbour services. This will improve service considerably and may raise the handling capacity to 1,500 tons of cargo a day.

In Beira too, good progress has been made towards restoring normal working conditions. Since the arrival last March of ten new locomotives, the tonnages handled by the railways have increased substantially and the accumulation of cargo awaiting discharge has been reduced. All congestion was expected to be overcome by summer. A new wharf to be completed in October will provide much needed additional accommodation.

—BLAIR BIRKETT

Canadian Government Trade Commissioner

TRANSPORTATION

The Transportation and Communications Division of the Department of Trade and Commerce will be glad to supply shippers and others interested with information on water, rail, air and road transport services to and from Canada.

The Division has compiled a list of the principal Canadian trade routes and of the steamship companies maintaining services on them. To obtain this list and any further help with international transportation problems, write to the Director, Transportation and Communications Division, Department of Trade and Commerce, Ottawa.

General Notes

AUSTRALIA

New Distilling Company—A company known as Sunraysia Co-operative Distillery Ltd. has been registered in Melbourne, with a nominal capital of £A250 thousand, to carry out a co-operative scheme of manufacturing, producing and marketing spirits and other grape products. The registered office will be at Mildura, the centre of the Victorian grape-growing industry—Melbourne, August 25.

CHILE

Census Figures—Latest figures on the recent census give a total of 5,915,376 people. This compares with 5,023,539 at the last census in 1940, and is an increase of 17·8 per cent. The most important increases are in the Province of Santiago—1,748,609, an increase of 37·8 per cent—and in the Province of Concepcion, 409,919, an increase of 33 per cent—Santiago, August 5.

DENMARK

Dollar Premium Scheme—To increase dollar earnings, the Danish Government recently adopted a dollar premium scheme, effective August 15, 1952, whereby exporters of Danish goods to dollar areas will be allotted 10 per cent of the value of their dollar exports. This amount will be placed at their free disposal in European currency and may be used without restriction for imports of European goods. Import licences obtained in this manner will be transferable. It is expected that these free import permits will largely be used to import passenger automobiles—Oslo, August 19.

PHILIPPINES

Dollar Allocations Cut—The Central Bank of the Philippines has announced that the dollar allocation for imports during the second half of 1952 will be \$160 million, compared with \$190 million in the first half of 1952. The reduction was undertaken to comply with the Government's dollar retrenchment policy. Both controlled and decontrolled commodities will be affected—Manila, August 15.

SWEDEN

Dollar Imports Cut—Sweden has announced a reduction of imports from the dollar area for the second half of 1952 of 100 million kronor (about \$19 million Canadian at the present rate of exchange). A number of goods, including metals, chemicals and machines, will be affected.

The reason for this action is reported to be an expected decline in dollar earnings this year because of a weakening in the U.S. market for Swedish pulp—Stockholm, August 15.

Trade and Tariff Regulations

Bermuda Permits Import of Onions

The Bermuda Supplies Commission advised importers on August 5 that onions may now be imported into the Colony from Canada and U.S.

A notice of August 14 informed importers that permits will no longer be considered for the import of work gloves from dollar sources.

Jamaica Lifts Ban on Canadian Meats

Kingston, August 28—FTS—Because of the outbreak of foot and mouth disease in Canada, Canadian meats originating in provinces west of Ontario have not been allowed entry to this Colony during the past few months. Now that Canada has been officially declared free of the disease the ban has been lifted.

Indonesia's New Foreign Exchange Regulations

Singapore, August 26—FTS—Indonesia has introduced new foreign exchange regulations, effective August 12, under which importers of goods not deemed essential from all sources must purchase inducement certificates priced at 100 or 200 per cent of the value of the goods. In addition, no foreign exchange will be made available for the importation of luxury goods. The purpose of the new regulations, it is stated, is to assure the importation of essentials and to limit imports of a less essential nature. To carry out these regulations, imports have been classified into the following four categories:

- The first category comprises essential commodities for which foreign exchange will continue to be made available at the rate of 11·40 rupiah to one United States dollar. It includes the following goods of interest to Canadian exporters: wheat flour, canned sardines, evaporated milk, linseed oil, certain cotton fabrics, builders' hardware, certain chemicals, textile machinery and needles.

- The second category, consisting of less essential goods, is subject to payment of inducement certificates costing 100 per cent of the nominal c.i.f. price of the goods, in addition to foreign exchange at the officially quoted rate. This makes the effective rate of exchange 22·80 rupiah to one United States dollar. Among the commodities in this group, Canadian exporters may have an interest in rolled oats, pharmaceutical specialties, automobiles up to 2,500 c.c., fountain pens and propelling pencils not combined with precious metals, and certain kinds of paper.

- The third category is made up of semi-luxury goods which may only be imported upon payment of an inducement certificate of 200 per cent of the c.i.f. value in addition to the regular rate of exchange, resulting in an effective rate of 34·20 rupiah to one U.S. dollar. This category includes electric refrigerators, radios and automobiles over 2,500 c.c. valued up to \$2,100.

- For the fourth category, which embraces luxuries, foreign exchange will not be made available. The only items in this category which may be of interest to Canada are automobiles valued over \$2,100, and fountain pens combined with precious metals.

The new regulations do not cancel the requirement for obtaining dollar certificates in addition to the exchange at the rates outlined above for imports from the dollar area. The price for dollar certificates is at present fixed at .60 rupiah per U.S. dollar.

Ad valorem customs duties are payable on the basis of the effective rate of exchange for the commodity concerned, thus taking into account the value of the new inducement certificates.

Exporters may obtain information as to the classification of individual goods in relation to the new categories by writing to the Foreign Tariffs Division, Department of Trade and Commerce, Ottawa.

Ceylon Revises Import Control Policy

Colombo, August 27—FTS—As a means of conserving dollar expenditure on goods of a generally non-essential type which are normally available from sterling and soft currency sources, some nineteen commodities have been removed from Open General Licence No. 2, which covers imports from Canada, the United States, Philippine Islands, and specified Central and South American countries.

By a notification of the Acting Controller of Imports and Exports, effective August 25, the following goods, when they are the product of the above named countries, become subject to individual import licence: wireless goods and apparatus, including batteries and accumulators; refrigerators and refrigerating machinery; apparel of artificial silk, wool, cotton, leather, or any material other than silk or satin (including banians, hosiery, haberdashery, hats, millinery and artificial flowers, but excluding boots, shoes and leather belts); piece goods of cotton, bleached, dyed, grey, or printed; cotton mosquito netting; cotton thread; unspecified cotton manufactures; sanitary towels; flannel; woollen and worsted manufactures other than carpets, rugs, and scarves; blankets of mixed materials; handkerchiefs of artificial silk or of mixed materials (single or in lengths); unspecified manufactures of artificial silk other than mufflers and scarves; linen manufactures other than sail cloth and canvas; gloves, other than rubber gloves.

Boots and shoes, leather belts, and rubber gloves, which are mentioned as exceptions to the above items, were excluded from O.G.L. No. 2. They continue to be subject to individual licence. The other goods mentioned as exceptions—woollen and worsted carpets, rugs and scarves, artificial silk mufflers and scarves and linen sail cloth and canvas—are still admissible under O.G.L. No. 2.

Venezuelan Regulations for Agricultural Chemicals

Caracas, August 29—FTS—A new Venezuelan regulation controlling the manufacture and importation of fertilizers, insecticides, herbicides and prepared animal feeds was published August 28, 1952. It becomes effective immediately and will be administered by the Ministry of Agriculture and Stockbreeding. This regulation requires that all such products be approved and registered by Venezuelan authorities prior to sale, through the submission of three samples of each product, complete details of the composition, and additional copies of the label. The cost of the

Venezuelan analysis and eventual registration is to be borne by the applicant and will range from a minimum of bolivares 500 to a maximum of bolivares 1,000.

Article six of the regulation refers specifically to labelling and requires that the following information be shown in Spanish:

- Name, mark or commercial denomination of the product, addresses of the manufacturing firm and their representatives;
- Declaration of the active principles, inert materials which it contains and their effective percentages;
- Net weight of the contents in a container;
- Directions for use or dosage and other particulars;
- Label clearly indicating its toxicity, if any, and antidotes;
- Number under which it was approved by the Ministry of Agriculture and Stockbreeding.

A complete copy of the regulation in English can be obtained either from the International Trade Relations Branch of the Department of Trade and Commerce in Ottawa or from the Canadian Government Trade Commissioner, Apartado 3306, Caracas.

Trade Commissioners on Tour

TO familiarize themselves with conditions in this country and the special requirements of businessmen, Canadian Trade Commissioners return to Canada periodically. Exporters and importers are invited to discuss with the Trade Commissioner the markets and sources of supply in his territory.

F. H. Palmer, Consul General of Canada and Trade Commissioner in Manila, Philippines, began a tour of Canada on June 15; will visit the following cities in the next few weeks:

Montreal—Sept. 8-19

Ottawa—Sept. 20-23

Toronto—Sept. 24-Oct. 1

F. W. Fraser, formerly Commercial Counsellor for Canada in Melbourne, is continuing his Canadian tour and will visit the following cities during September and October:

Saint John—Sept. 15

Hamilton—Sept. 30

Quebec—Sept. 18-19

Ottawa—Oct. 2-4

Toronto—Sept. 22-29

Montreal and vicinity—Oct. 6-16

Mr. Fraser will become Commercial Counsellor in Stockholm at the end of the year.

R. F. Renwick, formerly Assistant Commercial Secretary in Bombay, has been appointed Assistant Commercial Secretary in Tokyo. Before sailing for his new post he will complete his Canadian tour in Vancouver, Sept. 15-19.

Businessmen may get in touch with these officers at Boards of Trade in Halifax, Saint John, and Montreal; Canadian Manufacturers Association in Toronto; Chambers of Commerce in Quebec and Hamilton; and the Dept. of Trade and Commerce (355 Burrard St.) in Vancouver.

Foreign Trade Service Abroad

† Indicates a change since previous publication.

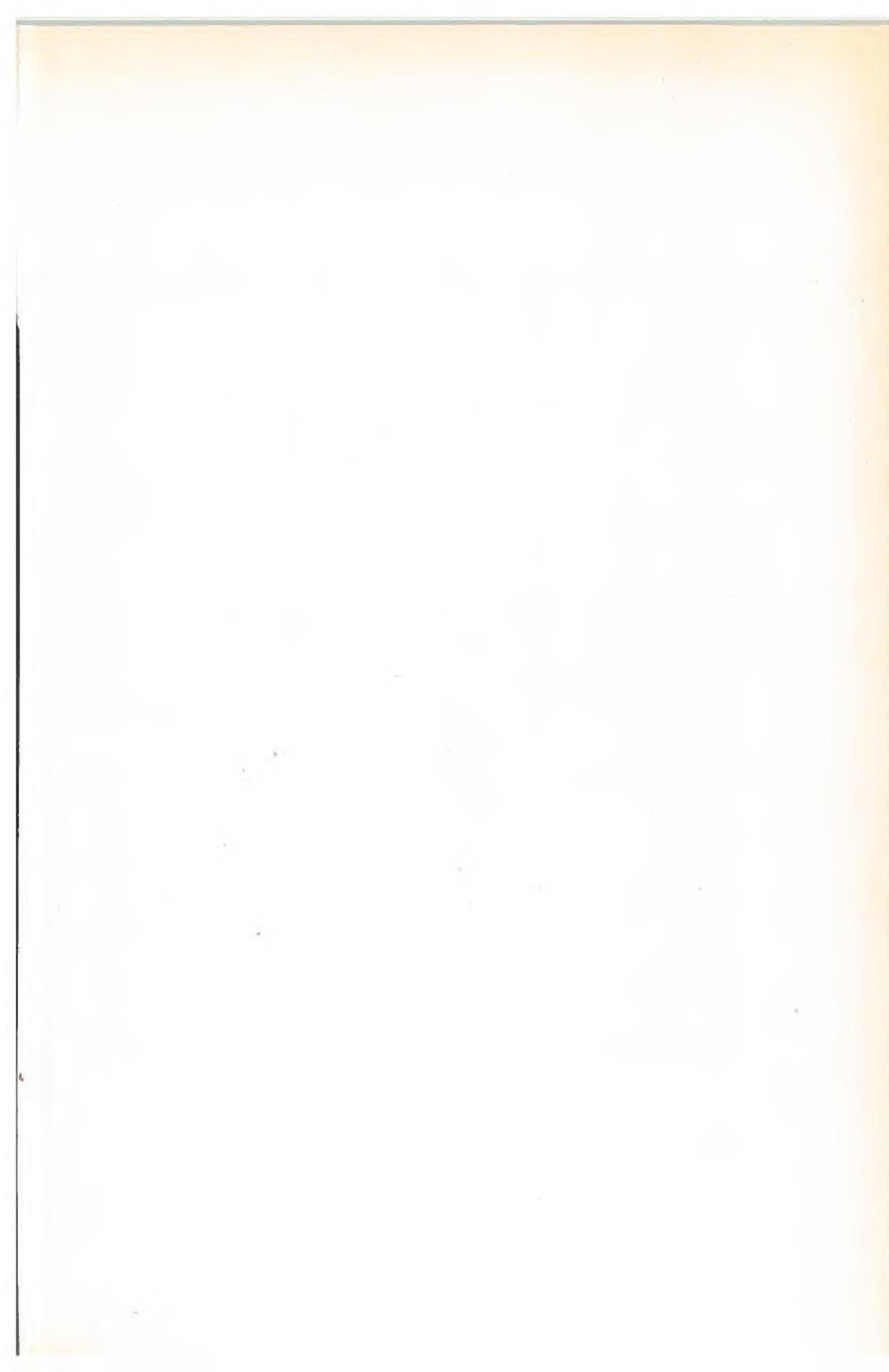
Bentley's Second Phrase Code is used by Canadian Trade Commissioners.

TERRITORY	OFFICER	CITY ADDRESS	MAIL AND CABLES, OFFICE TELEPHONE
Argentina Paraguay, Uruguay	C. S. Bissett, Commercial Counsellor W. B. McCullough, Agricultural Secretary	Canadian Embassy, Bartolome Mitre 478, BUENOS AIRES Canadian Embassy, Bartolome Mitre 478, BUENOS AIRES	<i>Mail:</i> (City Address) <i>Cable:</i> CANADIAN <i>Tel.:</i> 33-8237 <i>Mail:</i> (City Address) <i>Cable:</i> CANADIAN <i>Tel.:</i> 33-8237
Australia (Capital Territory, New South Wales, Queensland, Northern Territory) Dependencies Australia (Victoria, South Australia, Western Australia, Tasmania) Australia	C. M. Croft, Commercial Counsellor for Canada R. W. Blake, Acting Commercial Secretary for Canada R. W. Blake, Agricultural Secretary for Canada	City Mutual Life Building, 60 Hunter Street, SYDNEY 83 William Street, MELBOURNE 83 William Street, MELBOURNE	<i>Mail:</i> P.O. Box 3952 G.P.O. <i>Cable:</i> CANADIAN <i>Tel.:</i> BW 9351 <i>Mail:</i> (City Address) <i>Cable:</i> CANADIAN <i>Tel.:</i> MU 4716 <i>Mail:</i> (City Address) <i>Cable:</i> CANADIAN <i>Tel.:</i> MU 4716
Belgian Congo Angola, French Equatorial Africa	W. Gibson-Smith, Canadian Government Trade Commissioner	Forescom Building, LEOPOLDVILLE	<i>Mail:</i> Boite Postale 373 <i>Cable:</i> CANADIAN <i>Tel.:</i> 2706
Belgium Luxembourg	†T. J. Monty, Commercial Secretary	Canadian Embassy, 35 rue de la Science, BRUSSELS	<i>Mail:</i> (City Address) <i>Cable:</i> CANADIAN <i>Tel.:</i> 11-33-88
Brazil Brazil	C. R. Gallow, Commercial Secretary C. J. Van Tighem, Consul of Canada and Trade Commissioner	Canadian Embassy, Edificio Metropole, Av. Presidente Wilson 165, RIO DE JANEIRO Canadian Consulate, Edificio Alois, Rua 7 de Abril 252, SAO PAULO Galle Face Hotel, COLOMBO	<i>Mail:</i> Caixa Postal 2164 <i>Cable:</i> CANADIAN <i>Tel.:</i> 42-4140 <i>Mail:</i> Caixa Postal 6034 <i>Cable:</i> CANADIAN <i>Tel.:</i> 36-6301 <i>Mail:</i> P.O. Box 1006 <i>Cable:</i> CANADIAN <i>Tel.:</i> 5876
Ceylon	Paul Sykes, Canadian Government Trade Commissioner	Galle Face Hotel, COLOMBO	<i>Mail:</i> P.O. Box 1006 <i>Cable:</i> CANADIAN <i>Tel.:</i> 5876
Chile	M. R. M. Dale, Commercial Secretary	Canadian Embassy, Bank of London and South America Building, SANTIAGO Calle 19, No. 6-39, BOGOTA	<i>Mail:</i> Casilla 771 <i>Cable:</i> CANADIAN <i>Tel.:</i> 64189
Colombia Ecuador	W. J. Millyard, Canadian Government Trade Commissioner	Canadian Embassy, Avenida de las Misiones 17, HAVANA % Royal Bank of Canada Ciudad Trujillo	<i>Mail:</i> Apartado 1618 <i>Airmail:</i> Apartado Aero 3562 <i>Cable:</i> CANADIAN <i>Tel.:</i> 12-251 <i>Mail:</i> Apartado 1945 <i>Cable:</i> CANADIAN <i>Tel.:</i> M-9839 <i>Mail:</i> (City Address) <i>Cable:</i> CANADIAN
Cuba	A. W. Evans, Commercial Secretary	Osiris Building, Sharia Walda, Kasr-el-Doubara, CAIRO	<i>Mail:</i> P.O. Box 1770 <i>Cable:</i> CANADIAN <i>Tel.:</i> 23110
† Dominican Republic Haiti, Puerto Rico	R. E. Gravel, Canadian Government Trade Commissioner	Canadian Embassy, Avenida de las Misiones 17, HAVANA % Royal Bank of Canada Ciudad Trujillo	<i>Mail:</i> (City Address) <i>Cable:</i> CANADIAN
Egypt Aden, Anglo-Egyptian Sudan, Cyprus, Ethiopia, Hashemite Kingdom of the Jordan, Iraq, Lebanon, Saudi Arabia, Syria	Acting Canadian Government Trade Commissioner	Osiris Building, Sharia Walda, Kasr-el-Doubara, CAIRO	<i>Mail:</i> P.O. Box 1770 <i>Cable:</i> CANADIAN <i>Tel.:</i> 23110
France Algeria, French Morocco, French West Africa, Tunisia	J. P. Manion, Commercial Counsellor for Canada	3 rue Scribe, PARIS	<i>Mail:</i> (City Address) <i>Cable:</i> CANADIAN <i>Tel.:</i> OPEra 42-30
Germany Federal Republic	B. A. Macdonald, Commercial Counsellor	Canadian Embassy, 22 Zitellmannstrasse, BONN	<i>Mail:</i> (City Address) <i>Cable:</i> CANADIAN <i>Tel.:</i> Bonn 38927

TERRITORY	OFFICER	CITY ADDRESS	MAIL AND CABLES OFFICE TELEPHONE
Germany	Wm. Van Vliet, Agricultural Secretary	Canadian Embassy, 22 Zitelmannstrasse, BONN	<i>Mail:</i> (City Address) <i>Cable:</i> CANADIAN <i>Tel.:</i> Bonn 38927
Greece Israel	†H. W. Richardson, Commercial Secretary	Canadian Embassy, 31 Vassilissis Sophias Ave., ATHENS	<i>Mail:</i> (City Address) <i>Cable:</i> CANADIAN <i>Tel.:</i> 72-853
Guatemala Costa Rica, El Salvador, Honduras, Nicaragua, Panama and Canal Zone	J. C. Depocas, Canadian Government Trade Commissioner	28, 5a Avenida Sud, GUATEMALA CITY	<i>Mail:</i> P.O. Box 400 <i>Cable:</i> CANADIAN <i>Tel.:</i> 5590
Hong Kong French Indo-China, South China, Macau, Taiwan	T. R. G. Fletcher, Canadian Government Trade Commissioner	Hong Kong and Shanghai Banking Corporation Bldg., HONG KONG	<i>Mail:</i> P.O. Box 126 <i>Cable:</i> CANADIAN <i>Tel.:</i> 28336
India	Richard Grew, Commercial Counsellor	Office of the High Commissioner for Canada, 4 Aurangzeb Road, NEW DELHI	<i>Mail:</i> P.O. Box 11 <i>Cable:</i> CANADIAN <i>Tel.:</i> 40191
India Burma	B. I. Rankin, Commercial Secretary for Canada	Gresham Assurance House, Mint Road, BOMBAY	<i>Mail:</i> P.O. Box 886 <i>Cable:</i> CANADIAN <i>Tel.:</i> 20672
Ireland	†Acting Commercial Secretary for Canada	66 Upper O'Connell St., DUBLIN	<i>Mail:</i> (City Address) <i>Cable:</i> CANADIAN <i>Tel.:</i> 44251
Italy Libya, Malta, Yugoslavia	S. G. MacDonald, Commercial Counsellor	Canadian Embassy, Via Saverio Mercadante 15, ROME	<i>Mail:</i> (City Address) <i>Cable:</i> CANADIAN <i>Tel.:</i> 80-842
Italy	†C. F. Wilson, Agricultural Counsellor	Canadian Embassy, Via Saverio Mercadante 15, ROME	<i>Mail:</i> (City Address) <i>Cable:</i> CANADIAN <i>Tel.:</i> 80-842
Italy	†M. S. Strong, Commercial Secretary (Fisheries)	Canadian Embassy, Via Saverio Mercadante 15, ROME	<i>Mail:</i> (City Address) <i>Cable:</i> CANADIAN <i>Tel.:</i> 80-842
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