

**OCTOBER 17. 64**

# **FOREIGN TRADE**

**DEPARTMENT OF TRADE AND COMMERCE, OTTAWA**

**Selling Sporting Goods in Europe**

**How to Succeed in Foreign Markets**

**Foreign Trade Service Abroad**



# FOREIGN TRADE

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*Europeans are sports-minded—and as keen on camping as North Americans are. That's why the Department of Trade and Commerce is sponsoring an exhibit of sporting goods and camping equipment at a Cologne trade fair next month. Our profile of six European markets is timed with the SPOGA fair in mind.*

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*Do you feel that your company is too small to make a contribution to Canada's export trade or to help influence our trade policy? Or are you uncertain about how to get, through the Trade Commissioner, an intelligent assessment of the potential demand for your product? Then you will find this article from a Trade Commissioner with many years of experience particularly pertinent.*

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*A week ago, the Trade Missions Division released the report of the Canadian Factory-Built Housing Mission that visited four West European countries. If this digest of its findings interests you, write for a copy of the full report.*

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*Three years ago the Trade Commissioner Service opened an office in Tel Aviv with the author of this report in charge. He's now back in Canada and meeting businessmen to stimulate even greater interest in the Israeli market, our largest in the Middle East, before he returns to his post.*

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**COMING—CURRENT CONDITIONS IN LATIN AMERICA, OCTOBER 31 ISSUE**



# Selling Sporting Goods in Europe

**Canadian Exports of Sporting Goods to Europe\***

|                     | 1959    | 1960    | 1961    | 1962      | 1963      |
|---------------------|---------|---------|---------|-----------|-----------|
| <b>Britain</b>      | 56,459  | 286,825 | 254,232 | 459,650   | 411,798   |
| <b>Austria</b>      | 20,498  | 24,384  | 22,195  | 75,415    | 86,423    |
| <b>Benelux</b>      | 2,948   | 2,906   | 2,204   | 4,001     | 6,365     |
| <b>Denmark</b>      | 26,370  | 3,794   | 25,609  | 11,033    | 25,340    |
| <b>Finland</b>      | 13,008  | 17,386  | 28,827  | 24,549    | 71,688    |
| <b>France</b>       | 5,815   | 12,857  | 17,092  | 21,844    | 62,279    |
| <b>West Germany</b> | 49,056  | 129,392 | 115,002 | 167,440   | 190,750   |
| <b>Netherlands</b>  | 7,095   | 10,360  | 15,814  | 83,796    | 110,445   |
| <b>Norway</b>       | 6,703   | 1,930   | 10,349  | 8,887     | 24,577    |
| <b>Sweden</b>       | 49,120  | 47,779  | 94,589  | 129,383   | 220,969   |
| <b>Switzerland</b>  | 68,832  | 73,816  | 108,624 | 96,782    | 172,900   |
| <b>Total</b>        | 305,904 | 611,429 | 694,537 | 1,082,780 | 1,383,524 |

Source: Dominion Bureau of Statistics.

\*Excluding sports clothing.

NEXT month, 18 Canadian manufacturers of sporting goods and equipment will exhibit for the first time in Western Europe's largest sporting goods fair at Cologne, Germany. Known as the International Trade Fair of Sporting Goods, Camping Equipment, and Garden Furniture (or SPOGA for short), this fair is held every year. In 1963, some 641 firms from 23 countries exhibited and 10,400 trade visitors came to see what they had to offer.

The decision to have a Canadian section at this fair under the sponsorship of the Department of Trade and Commerce reflects the interest that manufacturers of sports clothing, sporting goods and equipment are taking in the market in Britain and in Western Europe. Over the last five years, sporting goods sales to these countries have quadrupled in value (see table on opposite page). Sales to the United States, the main market, during the same period have gone up only 27 per cent.

The U.S. continues to be our best customer for sporting goods and clothing, however; exports to Europe still equal only 20 per cent of the value of exports to the United States. And the Department's trade fair program continues to stress participation in exhibitions in the U.S. as well as in Europe. Canadian firms, for example, through the facilities of the Department of Trade and Commerce, will have displays in the following sporting goods and recreation fairs in the latter part of 1964 and early in 1965:

1964 "Sporting Goods" Western Market  
Ambassador Hotel, Los Angeles, California  
October 31-November 2, 1964.

International Trade Fair of Sporting Goods  
Camping Equipment and Garden Furniture  
(SPOGA) Cologne, Germany  
November 8-10, 1964.

National Sporting Goods Association  
Convention and Show  
Palmer House Hotel and McCormick Place,  
Chicago, Illinois  
January 31-February 4, 1965.

International Boat Show  
Genoa, Italy  
February 6-21, 1965.

The positive attitude that Canada's sporting goods industry has taken towards exporting is reflected in the foreign sales figures. During the first six months of 1964, exports of sporting goods rose 74 per cent over the same period in 1963 and by the end of the year could reach the \$10 million mark. Exports of pleasure craft reached \$1,584,859 in 1963, or 60 per cent higher than in 1962, and for the first six months of 1964 were 51 per cent above those for the same period in 1963. They should achieve a new high by the end of the year. Abroad, Canadians are best known as producers of quality winter sports clothing and equipment and the industry wants to achieve an equal reputation as a supplier of equipment for summer sports.

If a sporting goods firm is interested in increasing its production and is not sure whether it can compete in foreign markets, it must take some positive step to find the answer. This step could be contacting the Commodity Officer in Ottawa who covers this field so that he can assist and advise the Canadian manufacturer in locating those markets in which his products stand the best chance. The Trade Commissioners in the area selected can then make the initial contacts with the trade.

The following pages carry reports on five European markets for sporting goods—another way of helping manufacturers to decide where to make an initial export effort or where to find additional customers. ●

## Austria

Careful survey of Austrian tastes in sports suggests that there are opportunities for Canadians in certain fields—from bowling equipment to after-ski footwear and from snorkels to skates.

H. K. ROTT, *Commercial Assistant, Vienna.*

THE 1964 Winter Olympics held at Innsbruck, Austria, focussed the attention of many people on this Alpine country in the heart of Europe. As in the past, Austrian participants in the Games excelled in various competitions, particularly in skiing, which might well be called Austria's national sport. Although Austrians do not expect to make a spectacular showing in the forthcoming Summer Olympics at Tokyo, they are certainly sports-minded and with the exception of rugby, baseball and lacrosse, there are few types of sport which are not popular here.

Does this mean that there is a good market for Canadian sporting goods in this country? The answer is a qualified yes, and there are undoubtedly some opportunities Ca-

nadian manufacturers should explore.

### Summer Sports

● **Soccer**—By far the most popular sport in Austria is soccer. The Soccer Association boasts a membership of more than 1,500 clubs and 150,000 players. Important matches are played at the monumental Vienna Stadium which seats 100,000 spectators. Because soccer is so popular, it is little wonder that practically all required equipment is locally made. Pakistan, however, recently managed to find outlets here for soccer balls and, although there is little likelihood of Canadian companies supplying any soccer equipment, the fact that such a far-away country is successful here

should encourage Canadian firms supplying other sporting goods.

● **Tennis**—Tennis has a growing number of devotees and there are many well-kept tennis courts in Vienna, the provincial capitals, and all the better summer resorts. Brand names such as Slazenger and Dunlop are firmly established and it must be remembered that British suppliers enjoy tariff preferences in EFTA markets. People in the trade tell us that, although it would be an uphill struggle, there may be some chance to sell Canadian tennis racquets and balls.

● **Golf**—Golf remains an expensive sport in Austria and attracts primarily foreign visitors or foreign residents here, plus a relatively small group of affluent Austrians. There are now eleven well-laid-out golf courses, more than twice as many as in 1945, and almost all located in some of the most scenic spots in this country. Although the pros all hail from Britain and apparently prefer British equipment, it seems not impossible to place Canadian merchandise if substantial efforts are made to gain a share of the market.

● **Water Sports**—Water sports progress year by year. Most Austrians learn to swim in childhood and there are swimming clubs in every part of the country. Although there are restrictions on the use of outboard motors on most Austrian lakes, water skiing is becoming increasingly popular. Opportunities for selling outboard motors are limited but water skis and rubber suits for water skiing should find a market.

As in most other countries, skin diving shows signs of becoming popular and the demand for snorkels, masks and fins—so far supplied by local manufacturers and companies in West Germany, Britain, France and Italy—still leaves room for Canadian participation in the market. There is also a demand for the more sophisticated types of equipment, such as oxygen tanks and depth meters. Most Austrians interested in skin diving do their training

in Austrian lakes in preparation for more adventuresome underwater diving off the coasts of Yugoslavia, Italy and other Mediterranean countries.

● **Camping**—People in this country are enthusiastic campers and, even though many people claim that the market for camping gear is close to being saturated, novel and fancy equipment, such as coolers, stoves, collapsible chairs, beds and perhaps sleeping bags from Canada might provide Canadian suppliers with new outlets. Tents, air mattresses and trailers stand no chance because they are manufactured in large quantities here or imported from neighbouring countries.

● **Fishing**—Sport fishing is now coming into its own in Austria and the number of enthusiasts is increasing. Most of these people fish for trout but perch, pike and other freshwater fish are also of interest. Austrian and West German manufacturers have been the traditional suppliers of fishing gear such as rods, tackle and rubber boots but there seems to be sufficient scope for Canadians to share in this business.

● **Physical Education**—Because physical education is compulsory in primary as well as secondary schools and recommended at universities, novel gym equipment such as trampolines, which are all but unknown here, should have a future. Athletic clubs—and there are a large number in Austria—would also be potential customers. Local manufacturers concentrate on traditional equipment and it is considered unlikely that any Canadian company could compete in this field.

### Winter Sports

● **Skiing**—Skiing is the national sport in Austria and is second only to soccer in the number of enthusiasts. Today practically all hills and mountains suitable for skiing are equipped with cable railways, chair or ski lifts so that even the least hardy manage to participate in this sport. Austria exports various

types of skis, poles and bindings throughout the world and Canadian companies can probably not compete successfully with local manufacturers here. However, after-ski moccasins and boots made of seal-skin enjoy a lively demand which cannot be met by local suppliers. The same is largely true for parkas.

● **Skating and Hockey**—Skating has a promising future and two Canadian manufacturers of both hockey and figure skates have cornered a fairly large share of the market. Indeed, they are the only Canadian suppliers of sporting goods doing a substantial trade with Austria so far and their success is in no small part due to Canada's reputation as the home of hockey. To date there are only twenty hockey clubs in Austria and about fifty teams, some of which are trained by Canadians. Hockey will probably increase in popularity provided more artificial ice rinks appear, particularly in the larger cities. At present there are only three indoor rinks of regulation size. Sales of hockey equipment other than skates, such as protective pads and uniforms, are likely to improve as more and better rinks become available.

Most Canadian hockey skates are now sold not to hockey players but to the general public who regard the Canadian product as an attractive buy. Figure skates are being sold in greater numbers because Austrians, especially the girls, have won a leading position in international figure-skating competitions and appreciate a quality product. Canadian suppliers of figure skates, however, face fierce competition from Austrian and other European manufacturers.

● **Bowling**—In recent years Austrians have developed a fairly keen interest in bowling. Within the last two or three years two modern well-equipped bowling establishments with several alleys using automatic pin-setters have been built in Vienna and some others in provincial towns. Bowling has not yet reached the high degree of organization it enjoys in Canada and most alleys are for

ten-pin bowling. The trade, however, predicts a substantial future for this sport and Canadian suppliers of equipment would be well advised to investigate the opportunities. It should be borne in mind that the establishment of bowling alleys requires a considerable investment and that it is likely to take patience and perseverance to make suitable Austrian contacts for participation in such projects.

### How to Sell

Canadian companies interested in the small but increasingly prosperous Austrian market for sporting goods are invited to get in touch with the Office of the Commercial Counsellor at the Canadian Embassy in Vienna. If literature and information on prices c.i.f. North European port are supplied with the initial letter, we will be happy to make a preliminary investigation of sales opportunities. Prices f.o.b. are not desirable because few Austrian firms are willing either to calculate ocean freight or to bear the risk of fluctuating rates. Pakistani exporters of soccer balls, incidentally, have the habit of quoting c.i.f. Vienna, which is more than importers expect.

With the exception of bowling equipment, which requires a special approach, sales ordinarily are made to wholesalers who normally insist on exclusive distribution rights. The use of commission agents is not desirable because sporting goods are sold in relatively small specialty stores which are usually unfamiliar with import procedures. If sales opportunities look hopeful, this office will be in a position to suggest possible business contacts. The impact of a personal visit at this point (see "You'll Enjoy Visiting Austria" in *Foreign Trade*, May 2, 1964) would be great.

Once a suitable importer has been chosen, the Canadian company should consider providing him with financial help in his promotion efforts. Sporting goods are usually advertised in newspapers, at trade fairs and sometimes on T.V., and this takes money. Such assistance is

standard practice for European suppliers. Similarly, terms of payment granted to reputable importers are usually more generous than those considered normal in Canada. Payment by letter of credit is often customary only for original sales.

Finally, orders for sporting goods tend to be placed between six to

eight months before the retail selling season starts—that is, in February, March and April for winter sports equipment and in September, October and November for summer lines. Thus Canadian exporters interested in this market must plan well ahead and should lose no time in contacting us. ●

## France

Winter sports and camping equipment and pleasure craft offer best possibilities for Canadian sales, this survey of popular sports points out. Exhibits at fairs or a direct approach to department-store buyers are useful methods of initiating sales.

D. H. M. BRANION, *Assistant Commercial Secretary, Paris.*

A LARGE number of Frenchmen spend a good deal of time either practising their favourite sport or attending various sporting events. French people are often said to be individualists and this is true to some extent in their sports, which favour individual rather than team effort. However, there is also a good deal of enthusiasm for team sports; the three most popular are soccer, rugby and basketball. Table I indicates future trends in sporting tastes.

The standard of living of the average Frenchman has increased appreciably in recent years, enabling him to spend more on recreation. This means that the demand for sporting goods and equipment is

greater than ever before and Canadian firms should seize this opportunity to increase their share of this market which is still marginal, as shown in Table II on page seven.

### Sports Reviewed

Sales opportunities for Canadian goods vary from one sport to another. The following paragraphs review popular sports in this country briefly and discuss the possibilities each offers for Canadian sales.

● **Cycling**—This is the national sport of France. Every year millions of people either go to see or watch on television the world-famous Tour de France. No other sport in France has such fervent fans. Unfortunately, possibilities for sales in this field are poor because France is the world's leading racing-cycle producer.

● **Soccer**—Soccer has not attained the popularity in France that it enjoys in Britain but nevertheless many Frenchmen spend their weekends either cheering on their favourite team or having a game among friends at the nearest playing field. There are possibilities for the sale of shoes and other equipment if prices are competitive with those of French-made products.

TABLE I  
STUDENT MEMBERSHIP IN MAJOR  
SPORTS ASSOCIATIONS IN 1964

|                    |         |
|--------------------|---------|
| Cycling            | 482,413 |
| Football           | 440,336 |
| Boules             | 307,163 |
| Skiing             | 214,996 |
| Basketball         | 100,173 |
| Tennis             | 82,366  |
| Physical education | 73,076  |
| Judo               | 58,000  |
| Gymnastics         | 52,148  |
| Rugby              | 44,316  |
| Swimming           | 40,093  |

Source: French Ministry of Education.

● **Physical Education**—France has not yet been inspired by a fitness plan like Canada's 5 BX but a number of Frenchmen are engaged in keeping in shape and one or two Canadian companies have been successful in selling body-building equipment.

● **Ice Hockey and Skating**—The popularity of ice hockey and skating is increasing each year. Most of the hockey skates are imported from Canada and Canadian companies are also selling figure skates and hockey sticks here. These sports will always provide a steady market for Canadian equipment, although demand will never be large because it is difficult to maintain good ice conditions in France.

● **Skiing**—France has some of the most beautiful skiing sites in the world. The most popular area is Grenoble, where the 1968 Winter Olympics are to be held. Although France is a large producer of skis and related equipment it imported six million francs worth of skis last year. There is also a good potential market for ski and after-ski boots. Ski clothes worn in France are usually in dark shades and the variety of color that one sees on the Canadian slopes is not evident here. Sportswear is very light because the French skier is much more interested in freedom of movement than in protection against the cold.

● **Other Winter Sports**—There is a market for equipment such as toboggans and sleighs. The French Government maintains a number of winter sports stations to allow people to ski and take part in other outdoor sports during the winter. There are bobsled and toboggan runs in most of these sports stations and it would be worthwhile to look into the possibilities of supplying the needs of these stations.

● **Tennis**—There is an ever-increasing interest in tennis. New clubs are being opened each year throughout France and many of the articles used in tennis (including racquets, balls and shoes) are bought abroad.



*This dashing Canadian sailboat has found favourable winds in a number of foreign markets including France, where the market for boats and water skiing equipment is promising. Canadian firms should take part in the French water-sport trade fairs.*

Large department stores stock a wide range of British and Belgian-made tennis equipment. Ping-pong and badminton are also popular and most of the articles used in these two sports come from Japan.

● **Basketball and Rugger**—It should be possible for Canadians to supply both footwear and balls for these sports. As Table II shows, in 1963 imports of balls and bladders totalled 860,000 francs.

● **Golf**—The average Frenchman finds golf rather expensive, which explains why it is not as popular as in North America. There are, however, a number of golf courses throughout the country. Clubs, bags and balls are imported essentially from Britain and Italy. There are exclusive stores which specialize in golf and tennis equipment.

● **Boating and Water Skiing**—Two large annual exhibitions, the Salon de la Navigation de Plaisance held in January and the Salon Nautique International held in September, are

devoted to nautical sports. Many middle class and upper class families have purchased yachts or pleasure craft. There are a large number of boat equipment manufacturers but in the past few years a number of boats have been imported. There is an increasing demand for outboard motors, boat accessories and water-skiing equipment. This is a most promising market and any Canadian company interested in this field would be well advised to visit or take part in one of the trade fairs specializing in it.

● **Camping**—Every French worker is entitled by law to a month's annual vacation and it is estimated that one out of every five French families takes a camping holiday. The camping equipment market is proving lucrative and French manufacturers have increased their output of tents and trailers. However, a number of imported articles, including stoves and specialized lights, are making their appearance on the shelves of French stores. A major

trade fair, the Salon Professionel International du Plein-Air, is held in Paris every fall and Canadian businessmen would be well advised either to attend this fair or to exhibit in it. Several Canadian firms have been successful in selling aluminum chairs for camping and barbecues.

● **Hunting and Fishing**—It has become a practice with many French businessmen to leave their offices on Friday afternoons to go hunting, usually in the form of organized hunts for pheasant and rabbit. Both clay pigeon and trap shooting are very popular. The French have a special taste in firearms and a num-

ber are imported into France, the larger part from other European countries. There is also a market for clay pigeons and traps.

Fishing is an extremely popular pastime in France; it is estimated that at least 6 per cent of the population are avid fishermen. French reels and rods are exported to all

**Table II**  
**Imports of Sports Equipment Into France in 1963**  
(in new francs)

|   |           |  |           |  |           |
|---|-----------|--|-----------|--|-----------|
| <b>Skis</b>   |           | <b>Balls for Golf, Baseball, Cricket, etc.</b> |           | <b>Shooting Carbines, Automatic</b>  |           |
| West Germany  | 2,553,000 | Total  | 348,000   | United States  | 399,000   |
| Austria   | 1,773,000 |  |           | West Germany   | 339,000   |
| Yugoslavia  | 825,000   | <b>Fishing Hooks</b>                           |           | Spain  | 121,000   |
| Italy   | 486,000   | Norway   | 759,000   | Other  | 85,000    |
| Switzerland   | 490,000   | Other  | 45,000    | Total  | 1,302,000 |
| United States   | 355,000   | Total  | 804,000   | <b>Pleasure and Sports Craft, Mechanically Propelled, Weighing not more than 100 Kilograms</b>     |           |
| Japan   | 205,000   | <b>Fishing Lures</b>                           |           | West Germany   | 165,000   |
| Other   | 243,000   | Total  | 50,000    | Italy  | 51,000    |
| Total   | 6,930,000 | <b>Fishing Rods</b>                            |           | Other  | 37,000    |
| <b>Skates (ice and roller)</b>                            |           | Japan  | 207,000   | Total  | 253,000   |
| Canada  | 187,000   | Other  | 67,000    | <b>Pleasure and Sports Craft, not Mechanically Propelled, Weighing not more than 100 Kilograms</b> |           |
| West Germany  | 91,000    | Total  | 274,000   | West Germany   | 280,000   |
| Britain   | 77,000    | <b>Reels for Fishing Rods</b>                  |           | Britain  | 95,000    |
| Other   | 62,000    | United States                                  | 109,000   | Japan  | 74,000    |
| Total   | 417,000   | West Germany                                   | 75,000    | Italy  | 68,000    |
| <b>Golf Clubs, Hockey Sticks and Similar Equipment</b>    |           | Other  | 90,000    | Other  | 143,000   |
| Britain   | 305,000   | Total  | 274,000   | Total  | 660,000   |
| Italy   | 202,000   | <b>Fishing Tackle</b>                          |           | <b>Pleasure and Sports Craft, Mechanically Propelled, Weighing more than 100 Kilograms</b>         |           |
| West Germany  | 154,000   | United States                                  | 109,000   | Italy  | 820,000   |
| United States   | 95,000    | Italy  | 118,000   | Norway   | 230,000   |
| Other   | 156,000   | West Germany                                   | 96,000    | Algeria  | 218,000   |
| Total   | 912,000   | Other  | 120,000   | United States  | 151,000   |
| <b>Tennis Racquets and Similar Equipment</b>              |           | Total  | 443,000   | Britain  | 118,000   |
| Britain   | 145,000   | <b>Sporting Guns and Rifles, Non-automatic</b> |           | Other  | 214,000   |
| Belgium   | 310,000   | Italy  | 3,088,000 | Total  | 1,661,000 |
| Pakistan  | 121,000   | Spain  | 1,046,000 | <b>Pleasure and Sports Craft, with Hulls of Rubber or Plastic, Weighing over 100 Kilograms</b>     |           |
| West Germany  | 82,000    | Belgium  | 934,000   | Total  | 75,000    |
| Other   | 278,000   | West Germany                                   | 298,000   | <b>Other Sporting Goods</b>  |           |
| Total   | 936,000   | Other  | 235,000   | Italy  | 383,000   |
| <b>Tennis Balls</b>                                       |           | Total  | 5,601,000 | West Germany   | 131,000   |
| Britain   | 264,000   | <b>Sporting Guns and Rifles, Automatic</b>     |           | United States  | 170,000   |
| Sweden  | 64,000    | Belgium  | 3,178,000 | Switzerland  | 80,000    |
| Other   | 12,000    | Italy  | 2,133,000 | Britain  | 67,000    |
| Total   | 340,000   | United States                                  | 288,000   | Other  | 118,000   |
| <b>Balls and Bladders (for football, volleyball etc.)</b> |           | Other  | 130,000   | Total  | 949,000   |
| Morocco   | 621,000   | Total  | 5,729,000 | <b>Shooting Carbines, Non-automatic</b>  |           |
| West Germany  | 163,000   | <b>Shooting Carbines, Non-automatic</b>        |           | West Germany   | 606,000   |
| Other   | 76,000    | West Germany                                   | 606,000   | Other  | 185,000   |
| Total   | 860,000   | Total  | 791,000   | Total  | 791,000   |

Source: French Bureau of Statistics.

corners of the world but specialized devices such as lures and fish-hooks could find a market.

All major department stores in France have sporting goods sections. The goods displayed in these are purchased by the department store buyers, generally from six months to one year in advance. In visiting these sections we discovered that almost 50 per cent of the goods on display had something to do with camping. There are several stores in Paris and in the other major centres throughout France which specialize in sporting equipment. Some of them cover the full range

of sporting goods and others devote themselves to one or two sports. For example, some handle sales of golf and tennis equipment, some hunting and fishing gear, and still others camping or boating equipment.

A number of trade fairs in or around Paris are devoted to sporting equipment, such as the Salon Nautique International and the Salon Professionel International du Plein-Air, already mentioned, and the Salon du Camping, Caravaning et des Sports (April 11-26). Canadian companies have exhibited at these fairs and their initiative has been rewarded. We strongly recommend

that any Canadian company interested in the French market attend these trade fairs to size up the competition and to meet the numerous European buyers who attend.

Canadian manufacturers who feel that they have a competitive product in any of the various fields of sport should definitely consider investigating this market. We suggest you write to this office, sending us literature and prices c.i.f. French port. If at all possible, please send literature in the French language. We feel that there is a market and that it has not been fully exploited by Canadian companies. ●

## Netherlands

Canada sells primarily ice skates and hockey sticks to the Dutch and demand is growing. Sales of other lines—camping trailers, clothes for sailing, skis—might be possible if exporters can match the prices of EEC competitors, who enjoy a tariff preference.

N. RIEMEIJER, *Commercial Assistant, The Hague.*

A population of 12.1 million squeezed into an area of only 13,000 square miles does not leave much room for sports, but even so the Netherlands is a fair market for sporting goods. In fact, the demand has increased substantially during the last ten years with the steadily rising standard of living. The market is being supplied by a large number of local producers and by foreign manufacturers. Exporters in the EEC countries naturally have an advantage because Netherlands' duties on their products are considerably lower than those on goods from countries outside the Community, as the figures below show.

|                      | EEC tariff | General tariff<br>(in per cent) | Turnover tax on duty-paid value |
|----------------------|------------|---------------------------------|---------------------------------|
| Sporting goods       | 8.0        | 19.0                            | 5.0                             |
| Pleasure craft       | nil        | 3.6                             | nil                             |
| Tents                | 7.2        | 18.0                            | nil                             |
| Camp beds            | 6.4        | 16.0                            | 8.0                             |
| Other camp equipment | 9.6        | 19.0                            | nil                             |
| Camping trailers     | 4.8        | 14.4                            | 5.0                             |

The summer sports season in the Netherlands runs from May to the middle of September (the weather is often cool and rainy), and the equipment buyers do their purchasing during September and October. For the winter season, which has little snow and not much severe frost, buying is done in February and March, with the exception of skates, which are usually purchased during November and December for the next season.

The larger Netherlands retailers and department stores prefer to buy direct from the sports goods manufacturers, although purchases are also often made through agents. The small retailers buy almost exclusively from local wholesalers who, in turn, obtain their goods direct from the producers.

Prices should be quoted c.i.f. Netherlands port. Terms of payment vary from cash against documents to 30/60 days after receipt of bill of lading. In the latter case,  $\frac{1}{2}$  per cent discount per month is granted for earlier payment.

Unquestionably, personal visits to the sporting goods buyers are the best way to promote sales; European producers make regular calls.

TABLE I  
NETHERLANDS IMPORTS OF BOATS

|                   | 1962       |                 | 1963       |                  |
|-------------------|------------|-----------------|------------|------------------|
|                   | No.        | Value (dollars) | No.        | Value (dollars)  |
| <b>Total</b>      | <b>794</b> | <b>857,100</b>  | <b>900</b> | <b>1,101,900</b> |
| Of which:         |            |                 |            |                  |
| Belgium/Luxemburg | 129        | 119,700         | 73         | 96,000           |
| Britain           | 81         | 198,600         | 81         | 159,600          |
| Denmark           | 59         | 71,700          | 55         | 113,100          |
| Italy             | 106        | 104,700         | 49         | 99,600           |
| Norway            | 132        | 77,100          | 307        | 164,400          |
| United States     | 6          | 28,500          | 18         | 131,400          |
| West Germany      | 64         | 100,200         | 72         | 131,000          |

**Table II**  
**Netherlands Imports of Camping Equipment**

|                   | Tents            |                  | Camp Beds      |                | Other Camping Equipment |                | Camping Trailers |                  |              |                  |
|-------------------|------------------|------------------|----------------|----------------|-------------------------|----------------|------------------|------------------|--------------|------------------|
|                   | 1962             | 1963             | 1962           | 1963           | 1962                    | 1963           | 1962             |                  | 1963         |                  |
|                   | (in dollars)     |                  | (in dollars)   |                | (in dollars)            |                | No.              | Value            | No.          | Value            |
|                   |                  |                  |                |                |                         |                | (in dollars)     |                  | (in dollars) |                  |
| <b>Total</b>      | <b>1,361,400</b> | <b>2,008,200</b> | <b>333,300</b> | <b>464,400</b> | <b>638,700</b>          | <b>881,400</b> | <b>2,729</b>     | <b>1,835,100</b> | <b>4,473</b> | <b>3,199,400</b> |
| Of which:         |                  |                  |                |                |                         |                |                  |                  |              |                  |
| Austria           |                  |                  |                |                | 127,800                 | 183,300        |                  |                  |              |                  |
| Belgium/Luxemburg | 585,600          | 701,100          |                |                | 56,100                  | 119,400        | 272              | 210,900          | 377          | 310,800          |
| Britain           |                  |                  |                |                |                         |                | 1,264            | 1,014,600        | 2,466        | 1,958,700        |
| Denmark           |                  |                  |                |                | 69,000                  | 90,000         |                  |                  |              |                  |
| East Germany      |                  |                  |                |                |                         |                | 866              | 216,900          | 1,087        | 276,900          |
| France            | 529,500          | 753,600          | 54,400         | 40,200         |                         |                |                  |                  |              |                  |
| Hungary           |                  |                  |                | 79,800         |                         |                |                  |                  |              |                  |
| Japan             |                  |                  |                |                | 43,100                  | 94,200         |                  |                  |              |                  |
| West Germany      | 114,000          | 393,300          | 230,400        | 304,500        | 152,400                 | 203,400        | 258              | 330,000          | 317          | 452,100          |

Most Netherlands importers and large retailers visit the sporting goods fairs in Britain, West Germany, East Germany and Italy. And of course they attend the two fairs held annually in the Netherlands—the Sports and Boat Show in Amsterdam (usually in March) and the Sporting Goods Fair in Rotterdam (January). Direct mail is also an effective promotion method in this country, but it is not recommended that manufacturers themselves advertise because it is the usual practice for retailers to take on this responsibility.

### The Summer Market

Tennis, boating, swimming and camping are the Dutchman's favourite summer sports. Very little cricket is played and few go in for golf because there are so few golf courses.

● **Tennis**—Practically all tennis equipment is imported; tennis balls come mainly from Britain. Import figures for 1963 show total imports of tennis and badminton racquets, including frames, at \$309,000; the principal supplier was Hungary, followed by Belgium/Luxemburg, Britain, Japan, Pakistan and East Germany.

● **Boating**—Situated on the North Sea and with many rivers, canals and lakes throughout the country,

it is natural for the Netherlanders to enjoy boating. Demand for all types of pleasure craft is large and imports are growing despite the extensive domestic production. Nine hundred craft worth \$1,101,900 were imported in 1963 from 14 countries; principal suppliers (and comparative figures for 1962) are given in Table I. Canadian boat manufacturers face severe price competition. However, Canadian manufacturers of clothes for sailing may well be able to do business and they should investigate the opportunities here.

● **Camping**—During the last seven years, camping has become very popular in Holland. Domestic manufacturers of camping equipment

have increased their production but at the same time imports have expanded, as Table II shows. Canadian manufacturers of a good quality medium-size camping trailer, complete with tent, could probably do business if they can deliver at a c.i.f. price of about \$360. The Dutch look for lightness and ease of handling in tents; duck tents are unknown except for circuses. High freight rates are a handicap to Canadian exporters and in addition exporters in EEC countries have a preference of nearly 10 per cent in rates of duty.

● **Water Skiing**—This sport is popular but is permitted only in certain places because most of the water-

**TABLE III**  
**NETHERLANDS IMPORTS OF ICE SKATES**

|                | 1962           |                    | 1963           |                    |
|----------------|----------------|--------------------|----------------|--------------------|
|                | No. of pairs   | Value (in dollars) | No. of pairs   | Value (in dollars) |
| <b>Total</b>   | <b>171,813</b> | <b>557,000</b>     | <b>295,859</b> | <b>1,001,400</b>   |
| Of which:      |                |                    |                |                    |
| Austria        | 1,705          | 4,500              | 1,389          | 3,300              |
| Britain        | 4,299          | 7,500              | 12,283         | 22,500             |
| Canada         | 36,994         | 70,200             | 43,867         | 80,100             |
| Czechoslovakia | 6,662          | 33,600             | 20,143         | 86,400             |
| East Germany   | 6,000          | 9,600              | 3,000          | 4,800              |
| Japan          |                |                    | 31,276         | 52,800             |
| Norway         | 34,218         | 205,200            | 66,928         | 383,700            |
| Poland         |                |                    | 2,277          | 3,300              |
| Sweden         | 10,779         | 31,500             | 32,450         | 108,300            |
| United States  |                |                    | 4,761          | 5,700              |
| West Germany   | 66,519         | 188,700            | 75,510         | 246,000            |

ways are crowded and narrow. The weather also limits the demand for water skis, practically all of which are supplied by Italian producers at c.i.f. prices ranging from \$35 to \$40 a pair.

### The Winter Market

● **Ball Games**—Soccer is by far the most popular winter sport in the Netherlands, followed by outdoor basketball, field hockey, baseball and ice hockey—a mixture which may seem strange to Canadians but which is dictated by the weather.

With the exception of better class balls and boots, which are imported from Britain, practically all soccer equipment is made locally. This is also true of basketball and baseball equipment. Canada sells small quantities of baseball equipment in this market. Field hockey sticks come mainly from Pakistan and smaller quantities from India.

● **Ice Hockey**—Three ice hockey rinks are now open in the Netherlands, in the Hague, Amsterdam and Deventer, and a fourth is expected to be completed this October in Tillburg. This new interest in hockey is responsible for larger sales of Canadian hockey sticks which boosted our exports of sport goods (exclusive of ice and roller skates) by 200 per cent over 1962—or from \$11,100 to \$33,300.

● **Ice Skating**—The new rinks, together with the long 1962/63 winter, served to raise imports of Canadian ice skates and prospects for a further increase are favourable. Table III gives Netherlands imports of ice skates in 1962 and 1963 and the supplying countries.

● **Roller Skating**—Roller skating is fairly popular. Two local firms manufacture skates; 165,259 pairs were imported in 1963 at a cost of \$425,400. The principal suppliers were Britain and West Germany, followed by Japan, France and Belgium/Luxemburg.

● **Skiing**—There is some demand for skis. They are supplied now

mainly by Austria and Yugoslavia at c.i.f. prices ranging from \$8 to \$55. Canadians might be able to do some business in this line.

### Prospects for Canadians

Canada's only sporting goods exports to the Netherlands at present are ice skates, ice hockey sticks and small quantities of baseball equipment and children's sleighs. The demand for skates and hockey sticks

is good and can be expected to improve. Dutch importers have expressed an interest in other types of Canadian sporting goods, particularly clothes for sailing. As pointed out earlier in this article, Canadians do face severe competition, particularly from the EEC countries, but this office will be glad to make inquiries for any Canadian manufacturer who believes he can quote competitive prices. ●

## Sweden and Finland

These sports-minded countries make most of their own equipment but some imports also come in. Canadians are selling some skates and hockey sticks and these lines still offer best possibilities.

E. A. DIXON, *Commercial Assistant, Stockholm.*

THERE are not many countries which, in proportion to their population and bearing in mind the climate and general facilities, take a keener interest in sports and athletic contests than Sweden and Finland. Sport is widely publicized through the press, TV, and radio—and this helps to stimulate and increase public interest in the fortunes of both individual contestants and teams at home and abroad. Sport is highly organized in both countries and young and old participate to a high degree. The desire to keep fit and vigorous and to excel at sports is strong among the outdoor-loving Swedes and Finns.

The organization of amateur sport in Sweden indicates the attention and support given to games. Though it is less organized in Finland, the somewhat smaller population shows roughly the same trend, with nearly proportionate membership, participation in, and numbers of associa-

tions and clubs. The following figures show Swedish participation in sports in 1962.

|                      |         |
|----------------------|---------|
| Total clubs          | 18,361  |
| Sports events        | 129,071 |
| Regular participants |         |
| All ages: men        | 841,690 |
| women                | 220,291 |
| Under 25: men        | 641,700 |
| women                | 172,100 |

The ten sports that attracted the greatest number of members and participants in 1962 were:

|                            | Men     | Women  |
|----------------------------|---------|--------|
| Football                   | 213,127 | 369    |
| Athletics                  | 76,254  | 31,914 |
| Ice hockey                 | 81,976  | 482    |
| Gymnastics                 | 56,258  | 90,588 |
| Table tennis               | 56,237  | 8,055  |
| Bandy (land hockey on ice) | 48,184  | 1,977  |
| Cross-country skiing       | 46,642  | 17,762 |
| Handball                   | 42,146  | 12,721 |
| Route finding              | 41,804  | 11,144 |
| Tennis                     | 25,516  | 5,881  |

It is assumed that these ten sports are also the leading ones in Finland,

TABLE I  
SWEDEN'S IMPORTS OF CANADIAN SPORTING GOODS

|                        | 1962   | 1963    | Jan.-June 1963 | Jan.-June 1964 |
|------------------------|--------|---------|----------------|----------------|
| Ice hockey sticks      | 10,858 | 23,947  | 2,341          | 4,148          |
| Skates                 | 87,773 | 146,641 | 19,630         | 32,995         |
| Other sports equipment | 30,752 | 50,219  | 8,342          | 12,238         |

**TABLE II**  
**SWEDISH IMPORTS OF SPORTING**  
**GOODS, 1963**

|                             | Value<br>(in dollars) |
|-----------------------------|-----------------------|
| <b>Ice Hockey Sticks</b>    |                       |
| Canada                      | \$ 23,947*            |
| <b>Ice Skates</b>           |                       |
| Canada                      | 146,641*              |
| Britain                     | 50,000                |
| Hungary                     | 48,000                |
| Czechoslovakia              | 26,000                |
| Total, including all others | 336,000               |
| <b>Skis and Fittings</b>    |                       |
| Finland                     | 106,000               |
| Austria                     | 88,000                |
| Hungary                     | 88,000                |
| Yugoslavia                  | 78,000                |
| Total, including all others | 420,000               |
| <b>Tennis Racquets</b>      |                       |
| Britain                     | 50% of imports        |
| Total, including all others | 158,000               |

\*Dominion Bureau of Statistics figures.

though not necessarily in the same order as in Sweden.

### Main Suppliers

In general, the domestic market in both countries is well supplied with equipment for most winter sports made by local manufacturers. Of course, there is a fairly extensive import trade in equipment of all kinds and the tendency is to buy it from the home country of the particular sport. Ice hockey sticks and skates from Canada are one example. (See Table I.) This does not, however, mean that Canada is Sweden's or Finland's sole or even main supplier of ice hockey sticks and skates. In fact, both countries purchase them from Britain and the United States as well and Sweden also imports some skates from Finland. Finland sells some skis to Sweden.

There is no precise information on the value of purchases made by each of these countries during 1963 but the supplying countries can be identified in certain instances. (See Table II.) The Swedish import statistics for 1963 do not show ice hockey sticks separately but in a composite item called miscellaneous wooden sports goods.

Finland's statistics do not show any imports of skates or hockey sticks, but DBS figures put sales of hockey sticks last year at \$30,630 and of skates at \$24,579.

For sports purposes, the year in this part of the world falls into two clearly defined seasons—one extending over the winter from October to March when ice-hockey, bandy, ice skating and skiing are the only outdoor sports—and the other from March until October, when the main outdoor sports are football (soccer), tennis, route-finding and athletics.

### Selling Methods

Exporters who wish to sell in either of these markets would be well advised to begin promoting sales at least one month before the start of each of the seasons mentioned, though distributors in both

countries have been known to inquire about hockey sticks, for example, at the start of or even after the starting of the playing season.

Domestic manufacturers channel their sales via wholesalers and the larger retailers and imports are handled by wholesalers and agents and, in some instances, directly by the largest retailers.

When quoting prices to would-be customers in these countries it is advisable always to use local currencies, (one Swedish Krona=about 21 cents Can. and one Finnish Mark=33 cents Can.). As a rule payment is made against documents or, by importing organizations, within 30 to 90 days.

Both Sweden and Finland have shown some interest in Canadian ice hockey equipment and it seems likely that concentration on this line will meet with the best response. ●

## West Germany

More and more Germans are taking winter holidays or going camping or boating in the summer. More Canadian suppliers could cater to these groups—and perhaps begin by exhibiting at the two main sporting goods fairs, where buyers come bent on serious business.

G. D. VALENTINE, *Vice Consul, Düesseldorf.*

GERMANS take sport seriously and spend large sums of money on it. Last year total turnover in the sporting and camping goods industry exceeded \$375 million, of which \$110 million was spent on actual sporting goods. The remainder—approximately 60 per cent of the total turnover—was spent on sports clothing, camping and recreation equipment.

The most popular mass sport is "Fussball" or soccer football and almost every young German boy owns a football or plays the game. Footballs and boots, the only things needed, are almost 90 per cent supplied by German manufacturers. Imports of footballs from Pakistan

have had some degree of success but these are primarily in the lower price field for amateur use.

### For Winter Sports

The highest turnover in sporting goods is in the field of winter sports. Over five million Germans visit the ski resorts of Europe regularly and many thousands spend either a part of or their entire vacation in the mountains. Approximately 480,000 pairs of skis are produced in Germany each year, plus poles and bindings. Much of this is low-cost equipment for low-income skiers. High quality imports come chiefly from Austria, Italy and France, and



*Germans are fond of camping and many apartment dwellers take their tents or camping trailers to nearby lakes and rivers during the weekends. Here a group of young German campers gather around the fire to enjoy an evening singsong. Foreign manufacturers of camping equipment are selling successfully in the German market.*

total about \$2½ million. German exports of skis total about \$2 million per year.

Other winter sports—such as ice hockey, ice skating, tobogganing, and sleighing—are enthusiastically enjoyed by young and old alike. Winter sports articles are in popular demand during the Christmas season, particularly in Southern Germany. About 70 per cent of the demand is filled by domestic production, with imports of skates coming from Canada, Czechoslovakia and the United States.

Hockey equipment for use by amateurs is not sold in large quantities because the sport is not that popular. In fact, the word hockey in Germany connotes field or grass hockey and must be preceded by the word “ice” in talking of the winter sport. Low-cost gloves and body protection equipment are imported from Japan and Hong Kong; the better qualities are produced in Germany and also imported from Canada, Czechoslovakia and the United States. Some hockey sticks are produced locally but imports from Canada are well known for

their quality. Other sticks come in from Sweden and Norway.

#### **Camping Equipment Needed**

Camping equipment and supplies constitute the next largest category of sporting goods sold in the Federal Republic. The German people like camping and on weekends it is not unusual for apartment dwellers to pitch tents along rivers and lakes not far from their homes. Close to 75 per cent of these tenting needs are made in Germany, with France and Austria accounting for more than 65 per cent of the imports.

The allied items—such as cots, sleeping bags, chairs, tables, stoves, grills, coolers, etc.—also sell well and although production is high, imports from many countries sell side by side with domestic products. Air mattresses are becoming increasingly popular and Hungary, Denmark and the United States are selling large quantities of them.

There is a growing market for compact, low-priced camping trailers in Germany, provided that they can be pulled by a low horsepower car. The demand for these trailers in the

summer months, for both purchase and rental, is rising steadily each year.

#### **Boats in Demand Too**

The market for sports and pleasure boats in Germany is developing rapidly but the domestic industry is not yet geared for mass production. The specialized small-scale production methods mean high-cost finished products and consequently imports of watercraft are rising every year. In 1963, imports of sport boats totalled \$5.8 million and in the first six months of 1964 imports reached over \$4.5 million. Although only three of the leading 10 countries exporting boats to Germany are members of the European Economic Community, they enjoy tariff-free access to the markets and account for 40 per cent of the imports.

The boats in greatest demand are conventional motor boats and small motor yachts. Although there are some restrictions against motor boats on many inland lakes, the demand in the northern coastal area and Lake Constance on the Swiss border is active and there is a good potential market.

The restrictions against motor boats benefit the small sailboat market. A portable car-top boat that can be easily launched and has a sail area of 10-15 square meters is in good demand in many parts of Germany for pleasure and for use in competitive regattas. Canoes are still popular and it is interesting to note that the common name for a canoe in Germany is “der Kanadier”.

#### **Water Sports**

Fishing for sport is actually decreasing every year, partly because of poor facilities but chiefly because of increasing pollution of lakes and rivers. Angling equipment is sold chiefly in specialized stores and not by general sports dealers; the avid fisherman can still find good fishing in Europe and is prepared to buy high-quality equipment and travel to good fishing areas. German produc-

tion is lower-priced than most imports, except for the Japanese who supply over 50 per cent of the imports.

Water sports such as water skiing, swimming, water polo, etc., are very popular. Underwater swimming or diving is increasing and although German manufacturers have placed large quantities of low-priced goods on the market to appeal to the masses, there is also a demand for better quality equipment.

### Tennis and Golf

Tennis has found a good place in German sports circles; there are numerous clubs and although fees

are relatively high, they all have large memberships. Lower-priced racquets and balls are produced in abundance and high-quality British equipment has also found a good market. Table tennis is popular in the winter in both private households and athletic clubs. There is no demand for poor-quality balls or racquets; however, high-quality merchandise can be sold.

Golf, although well known, is not the mass sport that it is in North America. There are currently only 62 golf courses in all of West Germany, one for every 900,000 people. Almost 75 per cent of the courses are privately owned by

members whose yearly dues range between \$50 to \$125.

Practically all of the golf equipment in Germany must be imported and about 90 per cent of it is sold by golf professionals and golf teachers in the clubs. There have been repeated attempts by the German sporting goods dealers to share in this business, but so far they have had little success because most golf professionals receive equipment from foreign manufacturers on consignment and get their commission only when it is sold. When a retailer begins to sell a particular make, the professional simply recommends a competitive product and the retailer is forced out of the golf business.

As weekends become longer and there is more leisure time, there is bound to be an increase in the number of golf clubs in Germany. It remains to be seen if the stranglehold on golf equipment by golf professionals and private clubs can be broken as interest in the sport grows.

### Other Sports

Other sports—such as badminton, basketball, archery and boxing—all enjoy some degree of success in Germany as amateur sports and there is some demand for the better quality equipment used in these activities. Recent comments in the press indicate that there could be a rising demand for exercising and body-building equipment, as the German people are tending to become self-conscious about their expanding waistlines.

### Selling at Trade Fairs

Sporting goods are bought throughout the year in Germany but the bulk of the business is done at the two main sporting goods fairs held in November and April. The larger and more important of the two is the International Trade Fair for Sporting Goods, Camping Equipment and Garden Furniture (SPOGA) held annually in Cologne, and in which Canada will exhibit for the first time this November. This fair has a much wider scope

#### WHERE WEST GERMANY BUYS TENTS AND CAMPING EQUIPMENT

| Tariff No.        | 1961         | 1962                  | 1963         | Jan.-June<br>1964 |
|-------------------|--------------|-----------------------|--------------|-------------------|
| 62.04             |              | (thousands of U.S.\$) |              |                   |
| <b>Total</b>      | <b>2,135</b> | <b>2,435</b>          | <b>2,746</b> | <b>2,415</b>      |
| Of which:         |              |                       |              |                   |
| France            | 1,307        | 1,267                 | 1,522        | 1,197.5           |
| Austria           | 130          | 235                   | 354          | 402.7             |
| Japan             | 42.5         | 136                   | 96.5         | 205               |
| Belgium/Luxemburg | 189.7        | 46.7                  | 283          | 188.5             |
| Switzerland       | .....        | 83.5                  | 137.5        | 118               |
| Taiwan            | .....        | .....                 | .....        | 113.5             |
| Denmark           | 68           | 91.5                  | 98           | 63                |
| Britain           | 54           | 224                   | 96           | 59.5              |
| Netherlands       | 63           | 118                   | 6            | 23                |
| Hong Kong         | .....        | .....                 | .....        | 21                |
| Czechoslovakia    | 26           | 12.7                  | 21           | 10.5              |
| United States     | 34.5         | 49.5                  | 9.7          | .....             |
| Sweden            | 165          | 159                   | 4            | .....             |

Note: Figures for 1961 and 1962 include tarpaulins, sails, awnings, tents, and camping goods. Only tents and camping equipment are included in the 1963 and 1964 figures.

#### WHERE WEST GERMANY BUYS SPORTS BOATS

| Tariff No.    | 1961         | 1962                  | 1963         | Jan.-June<br>1964 |
|---------------|--------------|-----------------------|--------------|-------------------|
| 89.01         |              | (thousands of U.S.\$) |              |                   |
| <b>Total</b>  | <b>3,002</b> | <b>4,359</b>          | <b>5,378</b> | <b>4,555</b>      |
| Of which:     |              |                       |              |                   |
| Netherlands   | 369          | 721                   | 1,415        | 1,097             |
| Denmark       | 579          | 685                   | 627          | 577               |
| Japan         | 72           | 125                   | 364          | 566               |
| Norway        | 418          | 565                   | 557          | 381               |
| Italy         | 180          | 306                   | 475          | 353               |
| France        | 139          | 189                   | 306          | 314               |
| Britain       | 479          | 560                   | 493          | 281               |
| Switzerland   | 245          | 256                   | 241          | 191               |
| United States | 239          | 553                   | 323          | 191               |
| Sweden        | 224          | 181                   | 159          | 178               |
| Austria       | 27           | 48                    | 155          | 162               |

than the International Sports Goods Fair held in Wiesbaden and usually attracts more buyers and exhibitors.

As the name implies, the SPOGA Fair is more valuable for sales of summer sports goods and camping equipment, although equipment for all seasons is displayed. For winter sport articles, the Wiesbaden Fair is more popular. Attendance at both

fairs is restricted to buyers, manufacturers and agents in the trade. Buyers usually purchase at least six months in advance of the season and some even a year ahead.

### Channels of Trade

There are few sporting goods wholesalers in Germany and the usual channel is direct from the

manufacturer to the retailer. Many retailers are not adequately financed to buy in large quantities. Replacement orders part way through a season can therefore be expected, but prompt delivery must be assured. For this reason, the majority of retailers hesitate to import from distant suppliers.

Some small manufacturers are now acting as wholesalers and importers of non-competitive lines that complement their own production. These are the chief outlets for imported goods and more and more small manufacturers are entering into this aspect of the trade. With a good clientele already built up, they are able to provide reasonably good coverage for imported articles. In addition to these wholesalers, there are the four large department store chains which also import direct. Because they prefer to sell lower-priced goods on a large scale, they seldom handle top-quality equipment. There is also one large co-operative buying organization

TABLE I  
GERMAN TARIFFS ON SPORTING GOODS

| Tariff Numbers |   | EEC           | Other                      |
|----------------|---|---------------|----------------------------|
|                |   | Members       | countries including Canada |
|                |   | (in per cent) |                            |
| 42.02          | Bags for sport from leather or composition  |               |                            |
|                | a. Of artificial plastic sheeting   | 6             | 16.8                       |
|                | b. Other materials  | 4.8           | 13.8                       |
| 42.03          | Gloves for sports from leather or composition   | 6.8           | 15                         |
| 44.28          | Oars, paddles and steering gear for boats   | free          | 6.8                        |
| 62.04          | Tarpaulins, sails, awnings, sunblinds, tents, and camping goods   | 6             | 15.2                       |
| 64.06          | Cricket pads, shin guards and similar articles  | 4.8           | 14                         |
| 87.10          | Cycles  | 4.8           | 14.9                       |
| 89.01          | Ships, boats, 100 kilos or less   | free          | 6                          |
|                | Other   | free          | 3.6                        |
| 93.04          | Sport or target shooting guns   | 4.8           | 14                         |
| 93.07          | Sport or target cartridges  | 4.8           | 14                         |
| 97.04          | Equipment for parlour, table and fun fair games for adults or children (including billiard tables and pintables and table tennis requisites)  |               |                            |
|                | a. Playing cards including toy cards  | 7.6           | 18                         |
|                | b. Other:   |               |                            |
|                | I. Coin or disc-operated machines of the kinds used in cafes, fun fairs etc., for games of skill or chance (e.g., pintables of various types); billiard tables, special tables for casino games and similar furniture; table tennis sets; table tennis nets | 4.8           | 14.9                       |
|                | II. Other   | 6             | 16.8                       |
| 97.06          | Appliances, apparatus, accessories and requisites for gymnastics or athletics, or for sports and outdoor games (other than articles falling within heading No. 97.04):  |               |                            |
|                | a. Ice skates and roller skates; skis and fixing devices therefor; ski sticks; snowshoes; fencing equipment and accessories thereto   | 4             | 13.2                       |
|                | b. Golf clubs and shafts therefor   | 3.2           | 12.4                       |
|                | c. Balls and shuttlecocks, for sports:  |               |                            |
|                | I. Shuttlecocks with from 14 to 16 natural feathers   | 4.8           | 14                         |
|                | II. Other   | 6             | 15.2                       |
|                | d. Other  | 4.8           | 14                         |
| 97.07          | Fish-hooks, line fishing rods and tackle; fish landing nets and butterfly nets; decoy "birds", lark mirrors and similar hunting or shooting requisites:   |               |                            |
|                | a. Unmounted fish-hooks   | 2.4           | 7.2                        |
|                | b. Other  |               |                            |
|                | I. Fish landing nets; line fishing equipment other than fishing rods and reels; decoy birds, lark mirrors and similar hunting or shooting requisites  | 4             | 12.2                       |
|                | II. Other   | 4.8           | 13.6                       |

TABLE IV  
IMPORTS OF SPORTING GOODS\*  
INTO WESTERN GERMANY

|                              | 1961           | 1962         | 1963         |
|------------------------------|----------------|--------------|--------------|
| (thousands of U.S.\$)        |                |              |              |
| <b>Tariff Schedule 97.06</b> |                |              |              |
| <b>Total</b>                 | <b>3,927.5</b> | <b>5,059</b> | <b>6,570</b> |
| Of which:                    |                |              |              |
| Austria                      | 1,307          | 1,859        | 2,504        |
| Britain                      | 569.4          | 466          | 562          |
| Yugoslavia                   | 171            | 171.5        | 527          |
| Japan                        | 109.2          | 219          | 448          |
| Pakistan                     | 178.2          | 369          | 431          |
| United States                | 581            | 559          | 428          |
| France                       | 299            | 334.7        | 350          |
| Italy                        | 172            | 266          | 345          |
| Sweden                       | 87             | 245          | 233          |
| Canada                       | 91             | 121.5        | 149          |
| Netherlands                  | 68             | 80           | 146          |
| Switzerland                  | 45.5           | 109          | 94           |

\*Only goods falling under section 97.06 of the German Tariff Schedule.

| <b>Tariff Schedule 97.07</b> |      |     |      |
|------------------------------|------|-----|------|
|                              | 571  | 966 | 894  |
| <b>Total</b>                 |      |     |      |
| Of which:                    |      |     |      |
| Japan                        | 220  | 475 | 416  |
| France                       | 182  | 252 | 209  |
| Norway                       | 55   | 82  | 59   |
| Italy                        | 23   | 28  | 34.5 |
| United States                | 29.5 | 54  | 34   |
| Sweden                       | 25   | 36  | 30   |
| Britain                      | 12.5 | 8   | 8.7  |



*Germans of all ages are enthusiastic about all the winter sports, but especially skiing.*

which purchases sporting goods on behalf of over 60 leading retailers. This co-op, EGESPO, located in Heilbronn/Neckar, Gymnasiumstrasse 74, maintains its own stock and distributes to its members.

### **Competition and Mark-Ups**

It is interesting to note that the leading exporters of sporting goods to Germany are not members of the Common Market, with the exception of France in the camping field and the Netherlands in the sports boats field. Canadian manufacturers therefore face the same tariffs as the

majority of their competitors and the deciding factors usually are the price and quality of the goods.

Retailers of sporting and camping goods like to get a mark-up of approximately 40-45 per cent and wholesalers get an additional 5 to 10 per cent. Because both importers and retailers prefer to know their landed cost, prices should be quoted c.i.f. German or European ports and if possible, in Deutsche Marks, because many German retailers tend to equalize the United States and Canadian dollar to the disadvantage of Canadian manufacturers. Terms

of payment vary but generally German importers expect 3 per cent discount on payments within 10 days, 2 per cent within a month, and net prices over 30 days.

### **Canada's Position**

Canada is known in Germany as a land of ice and snow, and the average German does not associate Canadians with any sports except ice hockey and skating. At the present time there are some Canadian ice skate manufacturers selling in Germany but there is room for more. Sales last year reached \$126,000, an increase of 26 per cent over 1962. For the first six months of 1964, sales were running close to \$70,000 compared with \$23,114 for the same period of 1963. These figures reflect a mounting interest and West Germany now is the fourth largest importer of Canadian ice skates.

In other lines of sports goods, such as camping and recreation equipment, Canada does not fare as well. The recent opening of Canadian Government Travel Bureau offices in Frankfurt and Düesseldorf will no doubt help in surmounting this obstacle. By publicizing Canada's vacation highlights by means of films, literature and other promotion material, the Bureau will also inform German citizens about the abundance of Canada's recreational facilities. Like most people, the Germans tend to purchase sporting goods from countries whose citizens are avid users of the equipment (e.g., skiing equipment from Austria, tennis balls and racquets from England, etc.). Once they are aware that Canadians make and use sporting equipment of all kinds, the chances of increased sales will improve. Prospects are best for winter sports equipment and clothing, marine equipment and accessories, and all items used in outdoor living and camping. The Trade Commissioners stationed at Bad Godesberg, Hamburg and Düesseldorf are waiting to assist any Canadian manufacturer of sporting goods who desires to enter the market. ●

# How to Succeed in Foreign Markets

Trade Commissioner and manufacturer working together can make the best possible use of export expertise. Here is sound advice on how they can team up, to mutual advantage—and a word on how businessmen can help to influence Canada's terms of access to foreign markets.

S. G. TREGASKES, *Commercial Counsellor, London.*

CANADIAN manufacturers who are successful in domestic trade are well aware that three factors contribute to that success. The first is a good product, offered at a competitive price that yields a profit. A manufacturer who offers an inferior product, or one priced too high, or one sold at a loss will not stay in business long. Second, the manufacturer must be prepared to sell his product. He may make a superior article and offer it at a competitive price, but unless his potential customers know about it, he will still go bankrupt. Third, he must be familiar with his market. He must know what his customers want and

the channels of trade to use to get his product to them.

These same factors apply in export business but a fourth must be added. The exporter must still offer a good product at a competitive price. He must be prepared to go out and sell it aggressively and intelligently in overseas markets. He must have what can best be described as "export expertise"—knowledge of export markets equal to his knowledge of the domestic market. The new factor of which he must be aware is summed up in the expression "terms of access to markets". Canadian manufacturers who are interested in building export

markets for the future know that the first two factors are directly within their control and that their ability to sell outside of Canada as so far as these are concerned rests with them. The other two, however—export expertise and terms of access to markets—are areas where Canadian manufacturers can expect and count on full support and assistance from the Department of Trade and Commerce and other government departments.

## Terms of Access to Markets

The phrase "terms of access to markets" might be defined as the framework of government regulations (tariffs, import restrictions, etc.) affecting the opportunities to sell Canadian goods in foreign markets. There may be a number of reasons why a Canadian firm cannot sell in other countries, far beyond the two factors over which it does have control. Tariffs in some countries may be high to give complete protection to domestic industry and exclude foreign products. Some countries have quota controls and import and/or exchange restrictions which prohibit the Canadian from offering his goods or limit his sales. In some countries where duties are low and there are no or only minor trade controls, internal arrangements such as cartel agreements, building codes, electrical standards, labelling, packaging and health regulations, pure food laws, etc., may be designed to give effective advantages to the local in preference to the overseas supplier.

It is in this general area of international trade controls and impediments that the Canadian manufacturer must depend on the Department of Trade and Commerce and other departments of government to improve and extend his commercial potential in external markets. This is accomplished by Canada's active participation in the international trade relations field—for example, in the General Agreement on Tariffs and Trade and the Kennedy Round of tariff negotiations, in the Organization for

## Want the Trade Commissioner to Help You?

When you write, give him the following specific information:

- (a) Description of items, with illustrative material if possible.
- (b) Prices, preferably c.i.f. British port.
- (c) Estimated Canadian content in your products.
- (d) Quantity available for export per month or year.
- (e) Method of selling used by your company in Canada and the type of customers to whom you sell in Canada.
- (f) Method of selling that you would prefer to use in Britain.

This information is necessary if the Trade Commissioners here in Britain are to make a preliminary assessment of the competitive position of your goods. It is surprising how frequently Canadian manufacturers neglect to supply even part of this basic information in their initial letters. One manufacturer, for example, wrote quite recently: "I make footwear. Is there a market for it in Britain?" After needless correspondence, the footwear turned out to be slippers. Additional information came in due course and now that manufacturer is doing an

expanding business in Britain. He could have got started sooner.

**Item (a)** lets the trade office know the products you wish to export, with an indication of the styling and general appearance. **Items (b) and (c)** taken together enable our offices to arrive at a landed, duty-paid price. For example, if the Canadian content of the product is known, our offices can determine whether or not it can enter Britain free of duty under Commonwealth preference and if not, the rate of duty that will be assessed. The duty, if any, added to the c.i.f. price gives the landed, duty-paid value of the product and permits our offices to determine fairly readily the competitive position of the Canadian product vis-à-vis other imported products and those produced locally.

**Item (d)** is important because it tells our offices the type of selling coverage the manufacturer will need in Britain. There are 52 million prospective consumers here and it is useless for our offices to approach national distributors if the quantity available for export can be absorbed very readily in one area—for example, in Glasgow, Belfast, Birmingham, or Manchester. The marketing area, therefore, frequently needs to be

tailored to the quantity or number of the product available for export.

**Item (e)** indicates to our offices the method of selling that you use in Canada—it may be direct to retail outlets, to wholesalers, or by mail order. Similarly, the type of customer in Canada is helpful in assessing the level of approach in Britain. There are more than sixty department stores in London alone, some of which can be classed as high-priced. But the majority are in the medium-price field and a few in the low-price field. If you make high-quality merchandise, you would be ill advised to approach all department stores in the London area indiscriminately. You should seek the advice of the London office on the retail outlets likely to be prospective customers and to give this advice the office must know the quality and prices of the goods you are offering.

**Item (f)** will assist the trade offices to approach the right level of trade—for example, agents, importers, wholesalers, retailers, mail order houses, co-operatives, etc. The trade offices can usually advise whether or not the same channel of trade used in Canada can be used in Britain and if not, why not. Other channels of trade can then be suggested.

Economic Co-operation and Development, through the UN Conference on Trade and Development held last spring, the Commonwealth Economic Consultative Council, and through membership on many international commodity councils. In addition to being an active member of most of the international trade and economic organizations, Canada strives to improve commercial relations through direct contacts with her world trading partners.

### Business Viewpoint Needed

Although many manufacturers may be aware in general terms of Canada's attempts to improve current terms of access to foreign mar-

kets through international trade forums and by other means, many are perhaps unaware of how they may be able to influence or modify international trade in their own products. Many manufacturers who are exporting now or who are trying to enter export markets for the first time may think that these trade negotiations have only academic interest but no practical application to their products. This is not so. Government representatives and officials at international conference tables cannot work in a vacuum. They depend a great deal on information and advice provided by industry on a broad range of products and on a wide variety of subjects.

Many manufacturers, producers and exporters are aware of this inter-relationship and there is a growing interchange of information between government on the one hand and commerce and industry on the other. The Department of Trade and Commerce is always ready to offer advice and assistance to firms anxious to improve the terms of access for their products in foreign markets. Trade and industry associations can often play an important part in facilitating the interchange of information between Canadian exporters and the Department in the trade field. Only through a strong working relationship of this kind can Canada's negotiators be in

the best possible position to understand the interests and ambitions of Canadian industry and to attempt to translate these into improved terms of access to foreign markets by means of international trade negotiations.

### **Export Expertise**

Manufacturers contemplating entry into export markets—and even established exporters with years of experience—cannot expect to be as familiar with several overseas markets as they are with their home market. Knowledge of each market takes years to acquire and calls for patience and a readiness to be highly flexible. It is in this area that Canadian Trade Commissioners abroad can help Canadian exporters or prospective exporters materially. Manufacturers in Canada should regard Canadian overseas trade offices as distant branches of their own sales offices and rely on them as sources of information on marketing procedures, local sales techniques, market preferences, tariff and documentation requirements, current trade statistics, trends in design, and the countless other details manufacturers must have to plan their approach to overseas markets intelligently.

Canada currently maintains 67 Trade Commissioner offices in 47 countries. Each one of these offices has a fund of export expertise for its own territory and any Canadian manufacturer or exporter can draw on it. In Britain, for example, there are Canadian trade offices in London, Liverpool, Glasgow and Belfast, and they can quickly supply market information on many Canadian products to Canadian inquirers.

### **Good Sales Opportunities**

Britain is not only Canada's best overseas customer for a wide range of forest products, minerals and metals, bulk foodstuffs, animal feeds, chemicals and raw materials generally, but also imports a remarkable variety of manufactured goods from Canada, ranging from complex electronic equipment and

sophisticated machinery to clothing and household goods. Exports from Canada to Britain may increase in 1964 by as much as 20 per cent (or \$200 million over 1963) and opportunities for even greater trade appear promising. Manufacturers and producers in Canada who are not participating in this trade with Britain should contact the appropriate Commodity Branch in the Department of Trade and Commerce in Ottawa or, alternatively, should seek directly the advice and assistance of the Canadian trade offices in Britain on how to enter this export market.

If the Canadian manufacturer writes directly to one of the Canadian trade offices in Britain, he should provide the information detailed in the attached box.

### **Following up Inquiries**

Many export inquiries received from Canadian companies by our trade offices in Britain will not result in sales. For the great majority, however, the initial market survey proves encouraging. It is here that the next action to be taken by the prospective Canadian exporter can be most important and it is here that the advice and recommendations of the trade offices are frequently of the greatest help. Here is an illustration.

You, as a manufacturer or supplier, have a product or products that you wish to export to Britain. You write to one of the Canadian trade offices there, giving the information required and asking that a preliminary market survey be undertaken. Our offices in Britain complete the survey and this shows that the sales outlook for the product is promising. In reporting this to you, our offices will recommend the next steps for your company to take. This could be one or more of several alternatives and depends largely on the product. For example, many products may require the services of a sales representative or a local agent who will act on commission, calling on the appropriate level of trade and soliciting orders.

In other instances the market may appear promising enough to warrant the Canadian company opening a sales office in Britain immediately. For certain goods, usually high-style, it may be desirable to sell direct to one or two large department stores exclusively. In other instances, the product may appear to be readily saleable but its bulk or weight may make transport costs prohibitively high. Then our offices may suggest that it be manufactured under licence in Britain—or may recommend that the manufacturer come to Britain for a brief period to show his products either to the public at a suitable exhibition or to the trade at an appropriate trade show or in the display area of our trade office in London. Many alternative proposals or combinations of proposals could be put forward which in the experience of the trade offices are the most likely to lead to introductory and then expanding export business.

Once you have decided on your course of action, the Canadian trade offices in Britain will assist in the follow-through and make whatever arrangements you require, from booking hotel accommodation to making available office or display space, placing advertisements, renting an exhibition area, arranging appointments, showing samples, locating and engaging local staff, drawing up mailing lists, or arranging warehousing.

Many companies in Canada do not realize even yet the wide range of export services that the Department of Trade and Commerce in Ottawa and the Canadian trade offices in other countries offer. This pool of knowledge or export expertise is there to help them to sell in foreign markets. Many companies, too, are not aware of how they in turn can help the Department of Trade and Commerce and the Canadian Foreign Trade Service. A greater knowledge of the interdependence of business and government in the trade field will inevitably lead to a better co-ordinated and more effective export effort. ●

# TRADE COMMISSIONERS ON TOUR

## In Canada

The following officers are undertaking tours of business centres throughout Canada as detailed below. Businessmen who wish to see them should get in touch with the Board of Trade or Chamber of Commerce in the cities mentioned, with the following exceptions: Toronto, Canadian Manufacturers Association; Windsor (Ontario), Greater Windsor Industrial Commission; St. John's, Halifax, Montreal, Ottawa, Winnipeg and Vancouver, Department of Trade and Commerce; Fredericton, Department of Industry.

**Malaysia**—E. H. Maguire, Trade Commissioner in Singapore.

Toronto—October 19-23      Winnipeg—October 28-30  
Hamilton—October 26-27      Vancouver—November 9-18

**Peru**—K. G. Ramsay, Commercial Secretary in Lima, who will be returning to his post.

Toronto—October 19-23      Edmonton—November 2  
Hamilton—October 26-27      Calgary—November 3  
Winnipeg—October 28      Vancouver—November 4-12  
Regina—October 29      Victoria—November 13  
Saskatoon—October 30

## Temporary Duty in Ottawa

**B. C. Steers**, Commercial Secretary, Tel Aviv, October 12-30. Contact Asia and Middle East Division, phone: 99-2-5642.

## In Territory

**Bahamas**—L. D. Burke, Commercial Secretary in Kingston, Jamaica, will visit the Bahamas October 15-23.

**Bermuda**—W. G. Huxtable, Consul and Trade Commissioner in New York, will visit Bermuda October 16-21.

**Communist China**—R. K. Thomson, Senior Trade Commissioner in Hong Kong, and P. M. Roberts, Trade Commissioner, will visit Shanghai, Peking and Wuhan, October 8-28.

N. R. Gish, Assistant Trade Commissioner in Hong Kong, will visit Canton November 9-13.

**Ecuador**—J. G. Ireland, Commercial Secretary in Bogotá, Colombia, will visit Quito and Guayaquil October 19-30.

**Libya**—W. J. Jenkins, Commercial Secretary in Rome, Italy, will visit Benghazi and Tripoli November 8-18.

**Malta**—J. H. Stone, Commercial Counsellor in Rome, Italy, will visit Malta October 17-24.

**Netherlands Antilles**—W. D. Wallace, Commercial Counsellor in Caracas, Venezuela, will visit the Netherlands Antilles November 8-18.

**Pakistan**—R. D. Sirrs, Commercial Secretary in Karachi, will visit East Pakistan November 30-December 4.

**Poland**—K. Nyenhuis, Commercial Counsellor in Copenhagen, Denmark, will visit Poland October 18-24.

**Portugal**—P. A. Theberge, Assistant Commercial Secretary in Lisbon, will visit Oporto October 19-26.

**Venezuela**—J. R. Caux, Assistant Commercial Secretary in Caracas, will visit the Maracaibo area October 21-31.

Businessmen who would like these officers to undertake assignments for them should write to them at their posts as soon as possible.

**Postponed**—H. E. Lemieux, Commercial Counsellor, and J. H. Nelson, Commercial Secretary, in Guatemala City, have postponed their visits to Costa Rica, El Salvador, Honduras, Nicaragua and Panama, which were announced in the October 3 issue.

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## Decimal Currency Sizes and Values

DENOMINATIONS of the New Zealand decimal currency to be introduced in 1967 will be one, two, five, ten, twenty and fifty cents, and the Government is inviting the public to suggest suitable designs for the reverse sides of the coins. Awards of £50 will be offered for each design finally accepted.

The following coin diameters, although not final, will not be materially adjusted: one-cent piece, .70 inch; two-cent, .827 inch; five-cent, .765 inch (same as present sixpence); ten-cent, .931 inch (the present one shilling); twenty-cent, 1.126 inch (the present two shilling); fifty-cent, 1.240 inch.

It was proposed that the fifty-cent coin have an incused edge to distinguish it from the twenty-cent piece. This is a motto or appropriate wording engraved around the edge in place of the milling and was recommended by the Royal Mint.

The half-crown piece will no longer be minted and will be withdrawn from circulation beginning in 1965, so as to be out of circulation by 1967. The fifty-cent coin will be introduced in July 1967, if the half-crown is then effectively out of circulation.

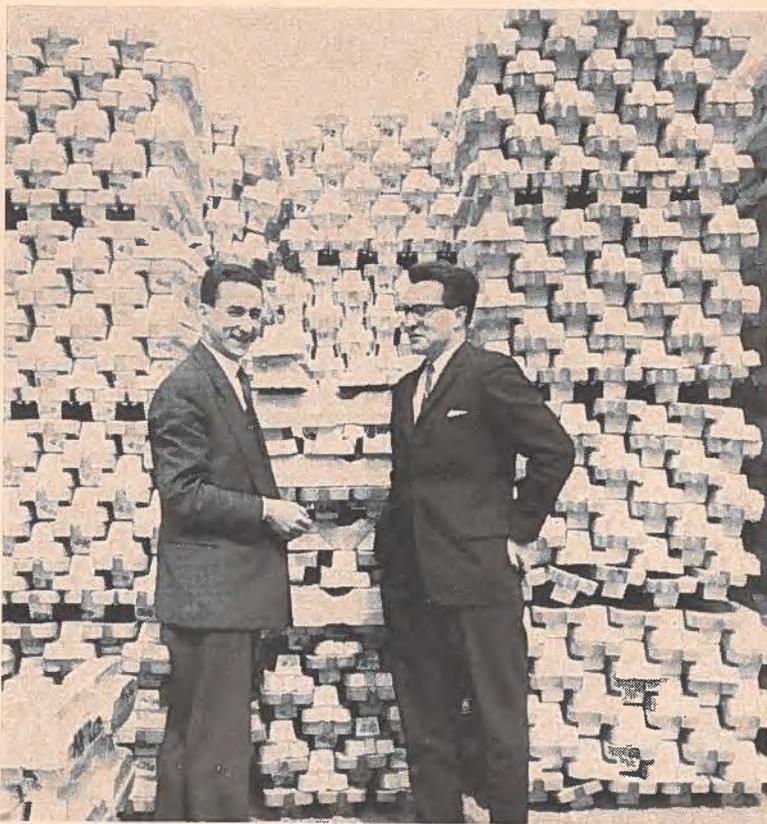
All existing coins will continue to circulate after July 11, 1967, the date of the changeover to decimal coinage, the Parliamentary Under-Secretary for Finance has stated. The present pennies, halfpennies and threepenny pieces will still be available to conduct sterling transactions in shops where sterling cash registers are operating.

The existing threepenny piece will continue to circulate as a direct equivalent for 2.5 cents and will be usable in parking meters, stamp-vending and similar coin-operated machines as at present, until these are converted. It is not intended, however, to mint a 2.5 cent coin.

The position of the halfpenny is not yet clear but the Government will decide finally as soon as current investigations by the Decimal Currency Board are completed. Present government thinking is that the halfpenny will be retained as a half cent.



If you were a Canadian Trade Commissioner stationed in Italy you'd expect to ride in a gondola once in a while—but in Finland! The picture proves it did happen to George A. Browne, Commercial Counsellor in Stockholm, (second from right), when he accompanied Pierre Dupuy, Commissioner General of Expo 67, (back to camera), on a visit to Finland. The gondola (said to be only the third exported from Venice) belongs to the owner of Valkeakoski mills where Mr. Dupuy and Mr. Browne were received under the auspices of the Finnish Fair and Central Association of Finnish Woodworking Industries.



Visits to industries help the Canadian Trade Commissioners to keep in close touch with the current business picture and increase their usefulness to Canadian exporters. Gilles Morin, Assistant Commercial Secretary in Paris, made it a point to see the new plant of Alcan Aluminium de France at Luce near Chartres. During his visit, Mr. Morin (right) was photographed (against a suitable background of aluminum ingots) with Jean Caldairou, Commercial Director of the company, who took him on a tour of the plant.

## Trade and C



Trade Commissioners return to Canada to make contacts with Canadian businessmen. Minister (Commercial), and E. J. W. the Vancouver Structural Testing Lab British Columbia. Watching a demonstration in models of fir plywood components. Manager of the Association, G. Meisl



Trade Commissioners attend many ceremonies both grand and simple, but they probably enjoy the ones that mark the successful conclusion of export arrangements for a Canadian firm best. Here, M. R. M. Dale, Consul and Senior Trade Commissioner in Boston (right) congratulates Bob Gray, President and Treasurer of Gray's Wayside Furniture Company, on his appointment as distributor in the Framington, Massachusetts, area for a line of Canadian furniture. Looking on is Willard Newhall, factory representative in the U.S. for the Canadian company.

## Commerce at Work

When the Indian Pulp and Paper Technical Association held its inaugural convention last April, Canada's senior trade representative in India, Gerald A. Newman, was a guest. Seen at the convention, above, are (left to right) V. Podder, President of IPPTA, Mr. Newman, Minister-Counsellor (Commercial) in New Delhi, and Chester A. Ronning, then High Commissioner for Canada in India, who opened the exhibition of pulp, paper and paper products that was on display at the convention.



About every three years to renew their personaling their home tour this summer, B. C. Butler, Commercial Secretary (Timber), in London, visited by the Plywood Manufacturers Association of the photo-elastic system of measuring stresses left to right, Mr. Ward, J. B. Armstrong, General technical representative in Germany, and Mr. Butler.



# The Opening Door: a Look at Europe's Prefab Market

A recent Canadian Trade Mission to Europe brought back good news for Canadian builders: single-family dwellings are gaining in popularity, and the factory-built home is among them. This article outlines some interesting facts brought back by the 12 members.

## They Went on the Mission

**Victor S. G. Lewis,**  
Mission Spokesman

Executive Vice-President of Engineered Building Limited, Calgary, Alberta.

**Harold H. Alexander**

President and General Manager of Eastern Operations, Muttart Builders Supplies (Ontario) Limited, Toronto, Ontario.

**Sol Burke**

Vice-President and General Manager, Colonial Homes Limited, Pickering, Ontario.

**Peter G. Dueck**

President of Dueck Homes Ltd., Abbotsford, British Columbia.

**Dieter K. Gerburt**

Executive Assistant, M. F. Schurman Company, Limited, Summerside, Prince Edward Island.

**Leonard Greenall**

President of Greenall Brothers, Ltd., Burnaby, British Columbia.

**Tadeusz Henryk Jankowski**

General Manager of Laminex Products Limited, Ste. Foy, Quebec.

**Robert Johansen**

Consulting Architect to Les Industries Treco Inc., St. Romuald, Quebec.

**W. Alvin Kaye**

President and General Manager of W. A. Kaye Enterprises Ltd., Haliburton, Ontario.

**Raymond Joseph Nelson**

President of Nelson Lumber Company Ltd., Lloydminster, Alberta.

**Percy M. Shearer**

President of Precision Prefab Products Ltd., Rexdale, Ontario.

**A. D. Monkhouse,**

Secretary of the Mission  
Commodity Officer, Forest Products Division, Department of Trade and Commerce, Ottawa, Ontario.

"THERE is a definite market for Canadian prefabricated buildings in Europe. The potential varies in the countries visited, and the market is open to various products . . . There is no doubt that timber-frame construction, which hitherto was not fully acceptable, is now finding its place, and will be used in all the countries visited to supplement their housing built by traditional methods if essential housing requirements are to be met."

These encouraging words come from a recently published report on the Canadian Factory-Built Housing Mission to Europe which took place recently. Sponsored by the Department of Trade and Commerce, the group included 11 senior executives from housing manufacturers across Canada, plus a Commodity Officer from the Forest Products Division of the Department. The members of the Mission took with them a descriptive brochure, *Factory-Built Housing from Canada*, and copies were distributed to interested officials. The 24-page booklet contained illustrations and floor plans of a representative selection of Canadian housing units.

The purpose of the Mission was to stimulate sales further in an export market which has been expanding rapidly in the past few years. During their three-week tour of Spain, France, West Germany and Britain, the members discussed their products with various companies and local government authorities and also investigated market potentials. They obtained first-hand information on the most effective marketing methods, the types of

houses preferred, and any changes in design needed to conform to local building bylaws.

The following are a few highlights from this report.

## Spain— Three Main Markets

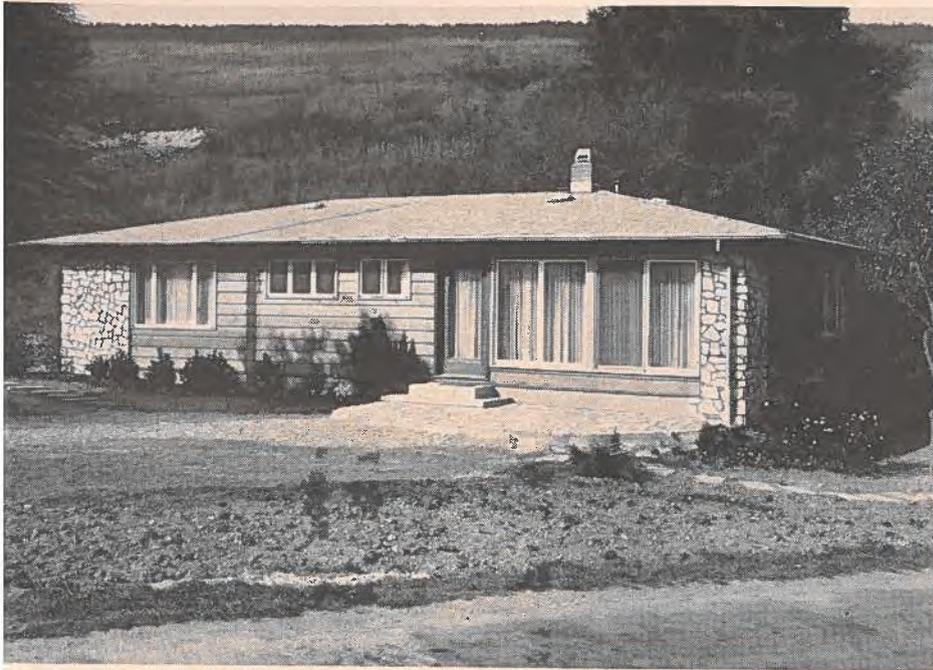
There are three main markets for factory-built units in Spain at present: cottages and summer homes, emergency housing, and retirement homes in the Canary Islands and the coastal areas of southern Spain.

Because lumber is scarce, it is not generally recognized or accepted as a structural material and local conditions also make it necessary to treat it against insects and decay. Although housing authorities advised that building codes allowed timber-frame construction, a considerable amount of education and promotion would be needed to sell the individual on it.

There is plenty of land for private building and financing charges are much lower than in Canada (4 per cent per annum with amortization over a period of 15 to 20 years). Relatively unskilled labor with a low wage level is in good supply, although skilled workers are being drained off to other European countries. Transportation facilities (both rail and truck) are adequate.

## France— Regulations Strict

The present housing shortage has created a definite market for prefabs, and growth prospects are good because there is an increasing trend toward single-family units. Summer cottages are now being imported



*Nestling in pleasant countryside near Frankfurt, West Germany, this factory-built house is one of the models that a Canadian company is exporting to Germany, France and Britain. Stone veneer and cedar siding create an attractive exterior; the design provides four bedrooms, living room, and a large dining-family room.*

from Britain and Canadian designs should create a considerable demand.

France's building bylaws and regulations are the most difficult to comply with in Europe, and although there is a National Code, local authorities still have some control over designs. There are two requirements worth special mention. First, the minimum clear ceiling height allowance for the first floor is 8.2 feet, a significant consideration bearing in mind the Canadian material module. Second, the builder is legally responsible for the performance of the house for a period of ten years after it is built.

Land is available for private development on terms similar to those in Canada. The French Government will not at this time sponsor mortgages on houses which have timber framing. Private mortgages can be obtained for short terms with interest at 10 per cent amortized over ten years. Down payments are usually one third of the total cost.

The building trade is organized in the same way as in Canada, and homes should be distributed through a qualified construction firm. In general, labor is easy to find—with the exception of some skilled workers such as plaster-board applicators. Transport facilities include trucks, railways and canals, and service is excellent.

#### **West Germany— Finished Houses**

German building codes require that houses clad with combustible material be widely spaced and this, coupled with the extremely high cost of land, inhibits the use of wood-frame construction. However, single-family frame housing is increasing. Competition in this market is very keen with about 440 German firms and 100 foreign companies offering prefabs. Extensive research and market surveys will be necessary before entering this market, says the Mission, and only a long-range program should be considered.

The Ministry of Housing has set out the minimum standards permitted in the construction of factory-built homes in the German Industrial Standards and these specifications are most important. Loan companies hesitate to accept mortgages on non-approved homes and government officials at the district level are not likely to allow non-approved buildings to be erected.

Germany is short of land (a common complaint in European countries), and a trend toward suburban living is now apparent. Because this land in most instances is being used for agriculture, complete development procedures will be necessary. These may be costly because present facilities (such as trunk sewers) are being used to capacity.

There are several ways to arrange financing, but two plans in particular are worth mentioning. Private institutions, insurance companies and banks are the basic lenders in the free market. Generally, first mortgages can be obtained up to 40 per cent of the value at interest rates of 6.5 to 7 per cent amortized over 33 years. Second mortgages can usually be obtained for the same rates of interest but terms over 10 years are extremely hard to arrange. An equity of over 30 per cent is required.

The tax-assisted mortgage market is open to anyone, but processing may take a long time. There is basically no difference from the free-market scheme, except that the borrower may obtain an additional DM.30,000 from his bank at 6.5 per cent for 33 years and thereby reduce the amount of equity needed. There are also other types of financial assistance.

The building trade in Germany is organized into one union, the Deutscher Gewerkschaftsbund. Full employment has meant that the union has no objection to the concept of factory-built homes. As a matter of fact, part of its funds are used for a building program which includes prefabricated components. The members of the mission were

told that only completely finished houses should be offered to the public, because arranging for sub-contractors is very difficult and there is an acute shortage of skilled labor. Selling should be done through an established agent or developer.

#### **Britain—**

#### **Most Competitive Market**

Demand for housing is very brisk, but land is scarce and prices are high and continuing to rise. The British market was the most competitive of those the Mission visited, and members felt that an on-the-spot Canadian planning and development organization was necessary. Growth prospects are good (350,000 new housing units is the industry's goal for 1964), and timber-frame dwellings are becoming more and more acceptable.

The regulations governing residential construction in Britain are currently being revised and the changes are aimed at providing more flexibility and allowing the use of new materials and methods. Many of the recommendations contained in the report by the British Housing Mission to Canada in 1963 have been taken into account. Local authorities retain a good deal of jurisdiction over building regulations and this has been something of a problem in the past. Decisions have often reflected personal prejudices. The new regulations may help to ease this problem.

The scarcity of land for building purposes is mirrored in current prices, which may range from \$30,000 to \$36,000 per acre. However, lots are smaller than in Canada. The average frontage for single units is 35 feet and in row housing about 20 feet. All lots must be serviced before building permits are issued.

Mortgages may be obtained from building societies, insurance companies and local authorities. When the mortgage is placed with one of the first two sources, the usual amount advanced is about 85 per cent of estimated value where the purchase price does not exceed \$15,000, or 80 per cent if the price

is higher. The usual interest rate at present is 6 per cent, but with the provision that the rate may be adjusted if necessary during the term of the mortgage. The repayment period may be up to 35 years. The insurance companies tend to have a shorter repayment period, while the local authorities may advance money on very long terms (60 to 70 years). Mortgage lenders work on quota capital and quotas are generally used up before the middle of the calendar year.

The availability of labor, both skilled and unskilled, largely depends on location. For instance, in Southern England and all of the industrial areas, labor is scarce. Wages also vary according to location. Transportation in Britain may

pose some problems because of load limits, and costs will depend on such factors as size, weight, distance and frequency of transport.

#### **Plan Ahead**

Although the over-all picture is bright, Canadian builders should not rush headlong into these markets. Companies considering exporting packaged housing must plan their approach with care and submit only detailed proposals. Rough specifications and approximate prices simply will not do.

Many more facts of interest to Canadian builders are contained in the Mission's full report. If you wish a copy, write to the Trade Fairs and Missions Branch, Department of Trade and Commerce, Ottawa. ●

### **South Africa Encourages Textile Expansion**

THE South African Government has taken positive steps to stimulate the further development of the textile industry—a move that should offer future opportunities to Canadian industry for the supply of equipment and raw materials.

The decision to make the equivalent of Can.\$67.5 million available for stimulating research and development in the textile industry over the next ten years has given impetus to the plans of industrialists to expand existing plants and to establish new ventures. This amount will be over and above the investment made by private business and expenditures by local authorities on services and employee housing. It has been estimated that investment in South African textile manufacturing facilities over the next decade will total more than Can.\$150 million, and that it will provide employment for approximately 40,000 people.

South Africa already has a textile industry (located mainly in the coastal cities of Cape Province) that supplies over 30 per cent of the total annual demand for all types of cloth. The weaving mills can supply about 50 per cent of the demand for wool and wool mix-

ture cloth, 41 per cent of all cotton and 15 per cent of rayon and cotton mixtures. The rate of development of the textile industry is clearly illustrated by the local consumption of cotton fibre, which has increased from 33,000 bales of 500 pounds each in 1952 to 120,000 bales in 1962. As a result, the local cultivation of cotton has gone up from 27,000 bales in 1952 to 52,000 bales in 1963. In view of the requirements of new industries and of the expansion schemes being undertaken by existing mills, there is still scope for much additional cotton production, as well as for the raw materials for synthetic fibre mills.

It is estimated that the total consumption of textiles within South Africa will increase from 385 million square yards in 1962 to 500 million in 1970 and to nearly 600 million in 1975. It is clear that the industry is assured of a rapidly expanding domestic market, probably of a growth in textile exports and textile industry suppliers should soon plan for the opportunities stemming from this future growth.

—H. W. RICHARDSON,  
*Trade Commissioner, Cape Town.*

# Israel Offers Opportunities



B. C. STEERS, Commercial Secretary in Tel Aviv, Israel, is now touring Canada to acquaint more Canadian businessmen with prospects for selling their products in dynamic Israel. Here is a profile of this market; for further information, arrange an appointment with the author when he visits your area.

ON most maps of the Middle East, the name Israel must be printed out in the sea, because there is no space inside the borders. Lake Erie is, in fact, 2,000 square miles larger in surface area. Yet this tiny nation, populated by only two and a half million people, buys more from Canada than any other country in the Eastern Mediterranean. Indeed, its total import bill is one of the largest in the region.

Israel looks west from two ports—Haifa and Tel Aviv-Jaffa—and to the Orient through Eilat on the Red Sea. Through these ports flows its vital foreign trade. Few countries are more dependent on what they buy and sell abroad. The foreign trade of Israel amounts to some 70 per cent of its gross national product, compared with 19 per cent in Canada and 50 per cent in Britain. This means that Israel must be continually awake to commercial and technological changes that affect international trade.

## Oranges and Diamonds

Agriculture provided about a quarter of total Israeli exports of some U.S.\$350 million last year, and this despite the fact that half the country's 8,000 square miles is desert. The remainder has a mild climate and with irrigation produces abundantly. Moreover, only 22 per cent of its population lives on farms. The Bible describes Israel as land of wheat and barley, vines, fig trees and pomegranates, a land of olive oil and honey. These are all still

produced but export earnings come from something entirely unknown in Biblical times—the orange, introduced from the Orient by Arab traders during the Middle Ages. The orange and to a very much smaller extent its relatives the lemon and the grapefruit provided Israel with 83 per cent of its nearly U.S.\$90 million of agricultural export earnings last year.

Three quarters of Israel's export commodity earnings come from the products of industry. Today it has become one of the world's main centres for the cutting and polishing of diamonds, accounting for 30 per cent of total world production. Pioneers in the diamond business were skilled immigrants from Holland and Belgium who arrived before the outbreak of World War II. Originally the industry concentrated mainly on small brilliants averaging 130 to 150 stones per carat, but in the fifties changed over to the manufacture of meles, averaging 4 to 25 stones per carat. Local manpower has been successfully trained and the industry now employs some 8,200 workers as opposed to only 1,500 a decade ago.

The export value of polished diamonds in 1963 stood at U.S.\$115.9 million, up nearly tenfold from a decade earlier. To produce these earnings the outlay on the raw material imported (because Israel possesses no diamond deposits) amounted to U.S.\$93 million. Canada, though not an important customer, purchases more than \$1.7 million of diamonds a year.

## Textiles and Foods

The Israeli textile industry in the past few years has become big business, and now comes next to diamonds as the second industrial export earner. Weavers and designers from Lodz in Poland, knitters from the Sudetenland in

Czechoslovakia, leatherworkers from Budapest, developed the fashion industry, with exports now to virtually every Western country, including Canada. The industry here in the main is a processing one which works on imported raw materials.

Employment has risen from 9,000 in 1955 to 35,000 today. Cotton spindles have increased from 61,000 to 312,000, worsted wool spindles from 5,500 to 39,000. As a result, exports have climbed during the period from U.S.\$5.6 million to U.S.\$30.5 million.

The development of the food industries parallels that of textiles. Exports in 1963 were valued at U.S.\$24.4 million. Some 63 per cent of these exports derive from citrus; the industry produces juices and concentrates as well as other by-products. Elsewhere production of food products has been oriented largely towards the needs of the local market, though certain branches do export in volume—for example, a substantial demand has been created for Israeli wines and brandies. There is also the beginning of a deep freeze and baby food export industry. Local production meets the demand for flour, canned fruit and vegetables, milk products, oils, fats, margarine, chocolates and candies.

### Mineral Earnings

Israel possesses few natural resources to provide exports other than potash dredged from the Dead Sea and relatively low-grade copper mined in the south. Exports in 1963 reached U.S.\$7.3 million. Expansion of the Dead Sea mining now under way should produce annual exports of U.S.\$25 million in the next few years. In addition to potash, bromine, magnesium compounds and common salt are extracted from the Dead Sea.

### Foreign Trade

The main sources of Israel's imports are the United States, Britain and West Germany, which together supplied 55 per cent of total imports in 1963. Canadian exports to Israel,

### WHAT ISRAEL BUYS (millions of U.S. dollars)

|                         | 1956         | 1957         | 1958         | 1959         | 1960         | 1961         | 1962         | 1963         |
|-------------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| <b>Consumer Goods</b>   | <b>50.8</b>  | <b>52.5</b>  | <b>54.7</b>  | <b>45.1</b>  | <b>46.0</b>  | <b>47.4</b>  | <b>48.0</b>  | <b>58.3</b>  |
| <b>Raw Materials</b>    | <b>245.2</b> | <b>285.0</b> | <b>272.5</b> | <b>289.7</b> | <b>330.8</b> | <b>361.5</b> | <b>407.5</b> | <b>475.6</b> |
| Of which:               |              |              |              |              |              |              |              |              |
| for agriculture         | 19.1         | 20.1         | 27.3         | 28.9         | 29.5         | 27.6         | 29.7         | 31.8         |
| for industry            | 164.2        | 192.2        | 187.3        | 207.5        | 250.4        | 284.2        | 320.8        | 351.2        |
| <b>Investment Goods</b> | <b>82.4</b>  | <b>97.4</b>  | <b>95.9</b>  | <b>95.2</b>  | <b>129.9</b> | <b>183.1</b> | <b>172.6</b> | <b>140.1</b> |
| Of which:               |              |              |              |              |              |              |              |              |
| for agriculture         | 11.4         | 8.2          | 7.9          | 9.3          | 8.8          | 11.6         | 11.4         | 6.3          |
| for industry            | 37.4         | 35.4         | 50.7         | 50.7         | 54.5         | 66.7         | 84.5         | 75.0         |
| for transportation      | 27.9         | 48.3         | 31.4         | 29.3         | 55.0         | 90.2         | 59.4         | 38.0         |
| <b>Total Imports</b>    | <b>378.4</b> | <b>434.9</b> | <b>423.1</b> | <b>430.0</b> | <b>502.7</b> | <b>592.0</b> | <b>628.1</b> | <b>674.0</b> |

Source: Statistical Bulletin of Israel 1964.

at \$8.2 million for the year 1963, showed an increase of \$2 million over 1962.

The annual value of commodity imports into Israel has risen from U.S.\$240 million in 1949 to U.S.\$674 million in 1963 and the composition of imports has changed greatly. In the beginning consumer goods accounted for 35 per cent of the total. With the development of local industry these imports were shut off so that in 1963 consumer goods represented only 8 per cent of the total. Raw material imports, principally finished and semi-finished industrial goods, have increased in absolute terms and also as a percentage of total imports, rising from 36 per cent in 1949 to 70 per cent in 1963. During this period, capital goods imports have expanded at a rate somewhat below that of total imports. Table I shows the structure of imports between 1956 and 1963. It confirms that purchases of consumer goods have risen very little during the period but those of raw materials for industry have doubled, and of investment goods for industry have more than doubled. Note that the market for industrial materials is seven times as large as that for consumer goods, mainly because of high tariffs and import restrictions.

Since independence Israel has maintained a system of controls over imports through licensing. In brief, imports were not permitted if the products concerned or reason-

able substitutes for them were made or produced in Israel. The Government of Israel in drawing up these regulations considered among other things the safeguarding of slender foreign currency resources and the protection of developing local industries. In the past two years the Government has begun a partial dismantling of this protective structure. Among the items no longer requiring import licences or for which import licences are readily granted, industrial products necessary for Israeli factories predominate. Many consumer products have also been freed, though in most cases the tariffs are such as to limit trade to a small volume. Very few food products, especially processed foods, are among the liberalized items. Full details of the regulations concerning particular products that interest you can be obtained from the Office of Trade Relations, Department of Trade Commerce.

### Canadian Sales Rising

A glance at Canadian exports to Israel over the past five years shows consistent growth. In 1959 they totalled \$4.5 million. By 1963 they had reached \$8.2 million and last year Canada ranked as Israel's fourteenth largest supplier.

Wheat has always led Canadian sales to Israel. Purchases (made by the Government of Israel through its Supply Mission located in New York City) approximate 40,000 metric tons a year and in 1963 had

a value of \$3.8 million. In the last two years flaxseed has joined wheat, with exports valued at \$177,000 in 1963. For some years cattle hides and calfskins have been marketed in Israel, to a value of about \$100,000 a year. Tobacco exports to Israel from Canada began in late 1963 with trial orders valued at \$48,000 from two of Israel's three leading cigarette companies. Shipments were made at the beginning of 1964. In July the third company placed its first order and repeat orders came in from the others. Our tobacco is therefore well introduced into this

market and should now be a continuing export.

Marked success has resulted from the efforts of Canadian salesmen of chemicals in Israel. With the growth of industry continuing on a broad scale, export opportunities for Canadian chemicals should expand as well.

There are two good reasons for the fact that lumber has been a leader in Canadian sales to Israel: keenness on the part of the exporter and a top-notch agent who can put together orders large enough for charter vessel loads. There is room

for more people in the business, but it is not easy. Wood pulp sales stopped in 1963, not because Israel ceased buying but because purchases are now made from Scandinavia. The Israelis have allowed the low freight rates from the Baltic compared with those from Canada to outweigh other factors.

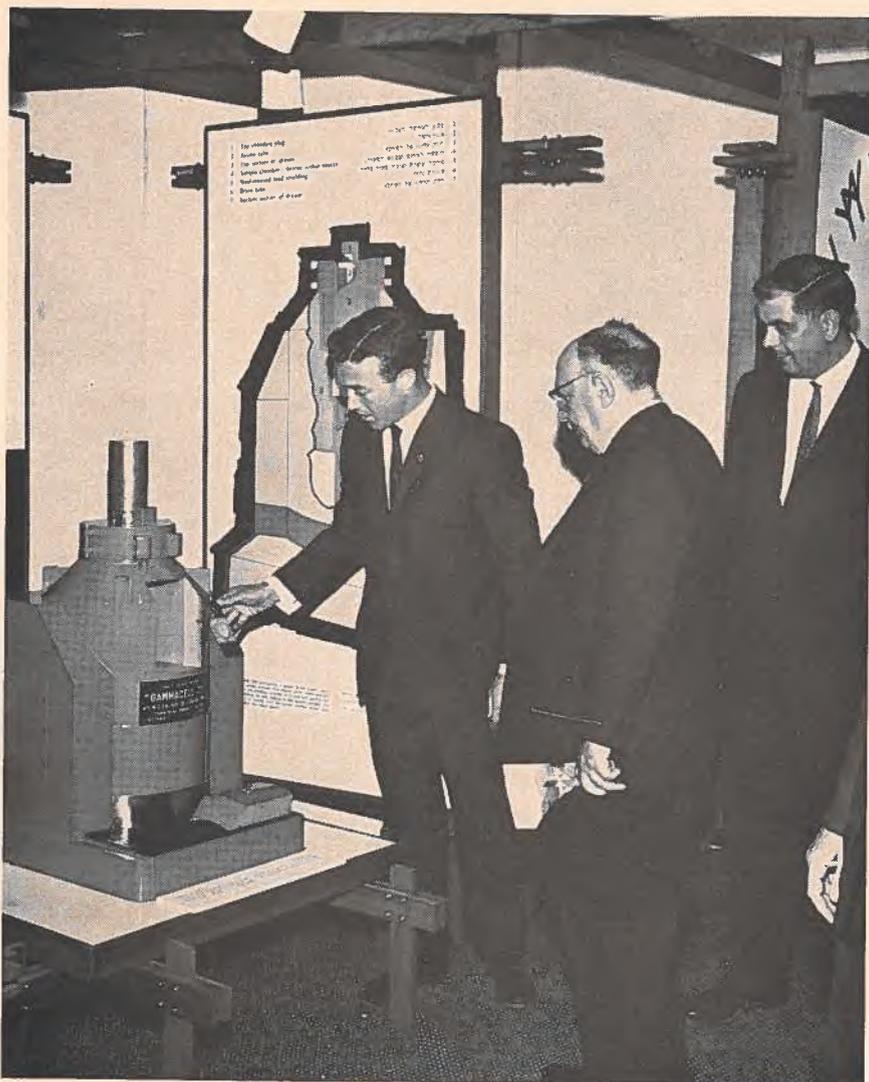
Canadian metals and basic metal products, led by aluminum, find in Israel a competitive but worthwhile market. The largest single order Canada has obtained in the manufactured metals section in Israel was, of course, telephone switching equipment sold on medium-term credit financed under section 21A of the Canadian Export Credits Insurance Act.

### Future Opportunities

The rapid industrial growth of Israel since independence shows no signs of abating and Canadian exports to feed Israel's industries should continue to expand. Recently the Israeli Ministry of Commerce and Industry published a forecast of industrial development 1965 to 1970, outlining the planned growth rate of various industries during this period. It thus provides an indication of where the best prospects for industrial exports lie. Materials to build these industries and materials to be processed by them will be needed. Outstanding growth is forecast for the following:

|                                   | per cent<br>a year |
|-----------------------------------|--------------------|
| Electric and electronic equipment | 14.1               |
| Mines and quarries                | 13.5               |
| Chemicals and refining            | 13                 |
| Automotive industry               | 12.9               |
| Printing and publishing           | 12.2               |
| Lumber and carpentry              | 10.9               |
| Rubber and plastics               | 10.7               |
| Diamonds                          | 10.6               |
| Textiles                          | 10.4               |
| Machinery                         | 10.3               |
| Clothing                          | 10.2               |
| Paper and cardboard               | 9.8                |

It may well be that your company can share in this booming economy. Why not find out? Write to the Commercial Secretary, Canadian Embassy, P.O. Box 20140, Tel Aviv, Israel. ●



The President of Israel, Mr. Zalman Shazar (centre), visited the Canadian exhibit at the Tel Aviv International Fair last summer. Here, accompanied by B. C. Steers (right), Commercial Secretary for Canada, he listens to D. L. Golding, Commercial Assistant, describing the Gammacell 200, one of the Canadian products displayed.

# FOREIGN TARIFFS

# AND TRADE REGULATIONS

## Brazil

**PRIOR DEPOSITS AND EXCHANGE SURCHARGES**—On August 3, 1964, the two categories of prior deposits for imports into Brazil were reduced from 200 per cent and 100 per cent to 100 per cent and 60 per cent respectively. However, at the same time, a new surcharge of 20 per cent on the amount of the exchange transaction was introduced.

On September 22, the 20 per cent exchange surcharge was increased to 30 per cent, the maximum permitted under the present Brazilian law.

On October 1, the prior deposits were reduced to 90 per cent and 50 per cent respectively.

## Ceylon

**FOREIGN EXCHANGE BUDGET**—In its recent budget, the Ceylon Government announced that a foreign exchange budget, introduced for the first time last year, would also be drawn up for 1965. In view of the further limitations on the country's foreign exchange resources, restrictions are to be imposed on imports for the industrial sector as well as for the trade sector. Foreign exchange is to be allowed for the import of raw materials and machinery only for industries approved under a scheme of national priorities.

The total foreign exchange available for imports for 1965 will be slightly less than in 1964. However, since the prices of essential food imports are expected to be somewhat lower in 1965, the exchange allocation for imports other than food may actually be larger than in 1964. Import quotas will be announced later in the year.

The Open General Licence system has been ended and all imports are being brought under licensing control including imports by government departments and state corporations.

The only import duty changes announced in the Budget were increases in the import duty on petroleum products.

*Further details are available from the Commonwealth Division, Office of Trade Relations, Department of Trade and Commerce, Ottawa.*

## Israel

**MARKING OF GOODS REGULATED**—The Ministry of Commerce and Industry of Israel issued in June, effective from date of publication in the official *Gazette*, regulations affecting the marking of imported foods. Each label or wrapping material on imported food

products must carry, in both the language of country of origin and in Hebrew, the name of the product, the name and address of the manufacturer or importer, the weight or size in grams, and a list of the ingredients or raw materials of which it is composed.

An application for endorsement of the label or wrapping must include (1) three sample wrappings for each type of merchandise to be imported, and (2) proposed marking label or wrapping printed in Hebrew (printer's proof of label or wrapping). The label must cover the entire area of the wrapping at least on one side and should include the above details. The Hebrew letters should be no smaller than half the size of the lettering in the foreign language but not less than two millimetres. This material should be submitted to the Food Import Division of the Ministry of Commerce and Industry. After the label or wrapping has been endorsed by the Food Import Division and printed by the importer, the latter must then submit to the Food Import Division five printed labels or five specimens of each type of wrapping. If the importer wishes to print the required details in Hebrew on the original wrapping, he may do so only after details have been proofread and accepted by the relevant authorities.

The Israeli Ministry of Commerce and Industry will approve the import of wrapped food and food products for consumption only if they conform to the weights and sizes set out in the regulations.

## Japan

### IMPORT DEPOSIT REQUIREMENTS AMENDED

—The Japanese Ministry of International Trade and Industry has lowered, effective August 29, 1964, the rate for advance deposits on some imports—on 45 items the rate has been reduced from 5 per cent to 1 per cent, and on 26 other items from 35 per cent to 5 per cent.

Commodities on which the rate of deposit has been reduced from 5 per cent to 1 per cent that are of interest to Canada include:

- Powdered skim milk
- Equine or bovine animal hair
- Rye
- Oats
- Maize
- Flour and meal of meat, fish and crustaceans
- Brans, sharps and other residues
- Oil cake and other residues
- Vegetable products for animal feeds
- Sweetened forage and other kinds of animal feeds

Phosphate chalk, natural calcium phosphate  
 Hydrocarbons, cyclohexanes  
 Lactones and lactanes  
 Sultones and sultanes  
 Natural animal or vegetable fertilizer  
 Synthetic organic dyestuffs  
 Chemical pulp (sulphite, kraft and others)  
 Cotton linter pulp  
 Silk and cotton waste  
 Sliver and roving of cotton  
 Waste of man-made fibres

Commodities that appear to be of interest to Canadian exporters on which the rate was reduced from 35 per cent to 5 per cent include:

Plant and parts used for perfumery or pharmacy  
 Vegetable materials for tanning  
 Gums, resins  
 Malt extract  
 Other vegetable saps and extracts  
 Unspecified varnishes, paints, distempers and other coatings  
 Albumen and derivatives thereof  
 Peptones and their derivatives  
 Prepared culture media for development of micro-organisms  
 Unspecified other chemical products and preparations of allied products

*Detailed information on the commodities affected by this amendment may be obtained from the Asia and Middle East Division, Office of Trade Relations, Department of Trade and Commerce, Ottawa.*

**CERTAIN RESTRICTED COMMODITIES LIBERALIZED**—Effective from October 1, the Japanese Government has liberalized imports of 13 additional items, thereby removing these items from the Negative List of restricted imports. These commodities include: preparations of roes of cod and herring, gin, a number of fertilizers, colour film, outboard motors of less than ten horsepower, crawler tractors, certain lathes, drilling and grinding machines, tractors other than wheel type, building boards of pulp.

**TARIFF QUOTAS ANNOUNCED**—The duty-free tariff quotas for the second half of fiscal year 1964 were announced on October 1 by the Japanese Ministry of International Trade and Industry. The quotas for this period, October 1964 to March 1965, include: molybdenum ore 3,705 metric tons, nickel (excluding anodes) 1,760 tons, silica sand 94,000 tons.

At the same time, the Japanese Government cancelled the tariff quota for copper and reduced the basic rate of duty to Yen 27 per kilogram from Yen 30 per kilogram. The unofficial levy of Yen 27 per kilogram on copper entering under quota has thus been cancelled. On copper ores and concentrates the unofficial levy of Yen 2 per kilogram was removed on the same date.

*Complete information on these changes will be available shortly from the Asia and Middle East Division, Office of Trade Relations, Department of Trade and Commerce, Ottawa.*



Dan Sarazen, Chief White Eagle of the Golden Lake Algonquin band, demonstrates the use of the unique ironwood mallet to peg together a birch-bark canoe. The Chief hand-built the canoe at the Canadian exhibit in the Marine Trades Show in Chicago, September 17-20. Dr. Charles F. Wilson, Canadian Consul General, presented the canoe to the Boy Scouts of America. The Chief's interested audience are, left to right, Donald H. Cheney, Consul and Senior Trade Commissioner, James M. Swofford, Deputy Regional Scout Executive who received the canoe, Explorer Scouts Gary Hurd and Glen Wallenta of Chicago, and George A. Taylor, Commodity Officer, Department of Trade and Commerce.

# Foreign Trade Service Abroad

## Mail and Cables, Office Telephone & Telex

| Territory  | Officer  | City Address  | Mail and Cables,<br>Office Telephone & Telex  |
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| <b>Argentina</b><br>Paraguay   | M. B. Bursey<br>Commercial Counsellor<br>H. E. Ryan<br>Assistant<br>Commercial Secretary<br>(Agriculture)  | Canadian Embassy<br>Bartolome Mitre 478<br>BUENOS AIRES                               | <i>Mail:</i> (City Address)<br><i>Cable:</i> CANADIAN<br><i>Phone:</i> 33-8237  |
| <b>Australia</b><br>(Capital Territory<br>New South Wales,<br>Northern Territory<br>Queensland)<br>Dependencies                                | J. A. Stiles<br>Commercial Counsellor<br>for Canada<br>R. L. Richardson<br>Assistant<br>Commercial Secretary<br>E. E. Price<br>Assistant<br>Commercial Secretary   | 21st Floor<br>A. M. P. Building<br>Circular Quay<br>SYDNEY                            | <i>Mail:</i><br>P.O. Box 3952 G.P.O.<br><i>Cable:</i> CANADIAN<br><i>Phone:</i> 27-7565<br><i>Telex:</i> SYD 20600<br>(CANGOVY AA 20600)                  |
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| <b>Australia</b>   | J. B. O'Neill<br>Commercial Secretary<br>D. I. Campbell<br>Assistant<br>Commercial Secretary   | Office of the High Commissioner<br>for Canada<br>Commonwealth Avenue<br>CANBERRA      | <i>Mail:</i> (City Address)<br><i>Cable:</i> DOMCAN<br><i>Phone:</i> 7-2541<br><i>Telex:</i> CBA C217<br>(DOMCAN CBA)                                     |
| <b>Austria</b><br>Albania, Bulgaria,<br>Czechoslovakia, Hungary,<br>Rumania, Yugoslavia  | W. J. Collett<br>Commercial Secretary<br>L. R. Wilson<br>Assistant<br>Commercial Secretary   | Obere Donaustrasse 49/51<br>VIENNA II   | <i>Mail:</i><br>P.O. Box 190, Vienna 1/8<br><i>Cable:</i> CANADIAN<br><i>Tel.:</i> 23-32-94<br><i>Telex:</i> 1-3380<br>(DOMCAN VIENNA)                    |
| <b>Belgium</b><br>Luxemburg,<br>European Economic<br>Community, European<br>Atomic Energy Com-<br>munity, European Coal<br>and Steel Community | L. H. Ausman<br>Commercial Counsellor<br>M. Faguy<br>Assistant<br>Commercial Secretary   | Canadian Embassy<br>35 rue de la Science<br>BRUSSELS 4                                | <i>Mail:</i> (City Address)<br><i>Cable:</i> CANADIAN<br><i>Phone:</i> 13.38.50<br><i>Telex:</i> 0-2613<br>(DOMCAN BRU)                                   |
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| <b>Brazil</b>  | D. M. Holton<br>Consul and Trade<br>Commissioner   | Canadian Consulate<br>Edificio Alois<br>Rua 7 de Abril 252<br>SÃO PAULO               | <i>Mail:</i><br>Caixa Postal 6034<br><i>Cable:</i> CANADIAN<br><i>Phone:</i> 36-6301  |
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| <b>Colombia</b><br>Ecuador  | J. G. Ireland<br>Commercial Secretary<br>J. C. Bradford<br>Assistant<br>Commercial Secretary  | Canadian Embassy<br>Edificio Banco de Los Andes<br>Carrera 10, No. 16-92<br>BOGOTA               | <i>Airmail:</i><br>Apartado Aereo 8582<br><i>Surface Mail:</i><br>Apartado 1618<br><i>Cable:</i> CANADIAN<br><i>Phone:</i> 43-00-65 |

| <b>Territory</b>   | <b>Officer</b>   | <b>City Address</b>   | <b>Mail and Cables,<br/>Office Telephone &amp; Telex</b>  |
|--|--|---|---|
| <b>Congo</b>   | Chargé d'Affaires  | Canadian Embassy<br>C.C.C.I. Building<br>Boulevard Albert 1er<br>LEOPOLDVILLE 1     | <i>Mail:</i><br>Boîte Postale 8341<br><i>Cable:</i> CANADIAN<br><i>Phone:</i> 2706<br><i>Telex:</i> LEO 68<br>(DOMCAN LEO)      |
| <b>Cuba</b>  | Commercial Division  | Canadian Embassy<br>Calle 30 No. 518<br>esquina 7ª Avenida<br>Miramar<br>HAVANA     | <i>Mail:</i> Gaveta 6125<br><i>Cable:</i> CANADIAN<br><i>Phone:</i> 32-3526   |
| <b>Denmark</b><br>Greenland, Poland  | K. Nyenhuis<br>Commercial Counsellor<br><br>G. H. Musgrove<br>Assistant<br>Commercial Secretary<br>(Agriculture)   | Canadian Embassy<br>Prinsesse Maries Allé 2<br>COPENHAGEN V                         | <i>Mail:</i> (City Address)<br><i>Cable:</i> CANADIAN<br><i>Phone:</i> Hilda 3306   |
| <b>Dominican Republic</b><br>Puerto Rico   | K. F. Noble<br>Commercial Counsellor<br>and Consul   | Canadian Embassy<br>Edificio Copello 408<br>Calle El Conde<br>SANTO DOMINGO         | <i>Mail:</i> Apartado 1393<br><i>Cable:</i> CANADIAN<br><i>Phone:</i> 2-8138  |
| <b>France</b><br>Algeria, Morocco  | R. Campbell Smith<br>Minister-Counsellor<br>(Economic/Commercial)<br><br>J. E. Montgomery<br>Assistant<br>Commercial Secretary<br>(Agriculture)<br><br>G. P. Morin<br>Assistant<br>Commercial Secretary<br><br>D. H. M. Branion<br>Assistant<br>Commercial Secretary | Canadian Embassy<br>35 Avenue Montaigne<br>PARIS 8e                                 | <i>Mail:</i> (City Address)<br><i>Cable:</i> CANADIAN<br><i>Phone:</i> BALzac 99-55<br><i>Telex:</i> 2-0600<br>(DOMCAN PARIS)   |
| <b>Germany</b><br>Federal Republic<br>(States of Baden-Wurt-<br>temberg, Bavaria, Hesse,<br>Rhineland-Palatinate,<br>Saar) | H. J. Horne<br>Commercial Counsellor<br><br>W. F. Hillhouse<br>Commercial Counsellor<br>(Agriculture)<br><br>C. Renaud<br>Assistant<br>Commercial Secretary  | Canadian Embassy<br>Kennedy-Allee 35<br>BAD GODESBERG                               | <i>Mail:</i> (City Address)<br><i>Cable:</i> CANADIAN<br><i>Phone:</i> 76995<br><i>Telex:</i> 886421 OR 886422<br>(DOMCAN BONN) |
| <b>Germany</b><br>(State of North Rhine-<br>Westphalia)  | H. E. Campbell<br>Consul<br><br>J. A. Elliott<br>Consul<br><br>G. D. Valentine<br>Vice Consul  | Canadian Consulate<br>Koenigsallee 82<br>4 DUESSELDORF 1                            | <i>Mail:</i> (City Address)<br><i>Cable:</i> CANADIAN<br><i>Phone:</i> 2-05-25  |
| <b>Germany</b><br>(City States of Bremen<br>and Hamburg, States of<br>Lower Saxony and<br>Schleswig-Holstein)              | R. W. Blake<br>Consul General<br><br>D. S. McCracken<br>Vice Consul  | Canadian Consulate General<br>Ferdinandstrasse 69<br>HAMBURG                        | <i>Mail:</i> (City Address)<br><i>Cable:</i> CANADIAN<br><i>Phone:</i> 326149   |
| <b>Ghana</b><br>Guinea, Ivory Coast,<br>Liberia, Mali, Maure-<br>tania, Togo, Upper Volta                                  | M. S. Strong<br>Commercial Counsellor<br><br>R. A. Kilpatrick<br>Assistant<br>Commercial Secretary   | Office of the<br>High Commissioner for Canada<br>E 115/3 Independence Ave.<br>ACCRA | <i>Mail:</i> P.O. Box 1639<br><i>Cable:</i> CANADIAN<br><i>Phone:</i> 4824  |
| <b>Greece</b><br>Turkey  | B. A. Macdonald<br>Commercial Counsellor<br>(absent)<br><br>F. I. Wood<br>Acting<br>Commercial Secretary   | Canadian Embassy<br>31 Vassilissis Sophias Ave.<br>ATHENS 138                       | <i>Mail:</i> (City Address)<br><i>Cable:</i> CANADIAN<br><i>Phone:</i> 714-041  |

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| <b>Guatemala</b><br>Costa Rica, El Salvador, Honduras<br>Nicaragua, Panama<br>and Canal Zone  | H. E. Lemieux<br>Commercial Counsellor<br>J. H. Nelson<br>Commercial Secretary<br>P. D. Donohue<br>Assistant<br>Commercial Secretary   | Canadian Embassy<br>5a Avenida 11-70, Zone 1<br>GUATEMALA CITY, C.A.                              | <i>Airmail:</i> P.O. Box 400<br><i>Surface Mail:</i> P.O. Box 444<br><i>Cable:</i> CANADIAN<br><i>Phone:</i> 28448 |
| <b>Haiti</b>  | Chargé d'Affaires, a.i.<br>and Consul  | Canadian Embassy<br>Route du Canape Vert<br>St. Louis de Turgeau<br>PORT AU PRINCE                | <i>Mail:</i> P.O. Box 826  |
| <b>Hong Kong</b><br>Cambodia, Communist<br>China, Laos, Vietnam,<br>Macao   | R. K. Thomson<br>Senior<br>Canadian Government<br>Trade Commissioner<br>P. M. Roberts<br>Trade Commissioner<br>R. G. Woolham<br>Assistant<br>Trade Commissioner<br>N. R. Gish<br>Assistant<br>Trade Commissioner | Hong Kong and Shanghai<br>Banking Corporation Bldg.<br>HONG KONG                                  | <i>Mail:</i> P.O. Box 126<br><i>Cable:</i> CANADIAN<br><i>Phone:</i> 224087<br><i>Telex:</i> DOMCAN HKG 391        |
| <b>India</b><br>(except States of Gujerat,<br>Maharashtra, Andhra<br>Pradesh, Mysore, Madras,<br>Kerala) Bhutan, Nepal,<br>Sikkim                             | G. A. Newman<br>Minister-Counsellor<br>(Commercial)<br>for Canada<br>W. G. Roberts<br>Assistant<br>Commercial Secretary  | 13 Golf Links Road<br>NEW DELHI 1   | <i>Mail:</i> P.O. Box 11<br><i>Cable:</i> CANADIAN<br><i>Phone:</i> 61-8254  |
| <b>India</b><br>(States of Gujerat,<br>Maharashtra, Andhra<br>Pradesh, Mysore, Madras,<br>Kerala)   | W. G. Brett<br>Canadian Government<br>Trade Commissioner   | Gresham Assurance House<br>Mint Road<br>BOMBAY 1-BR   | <i>Mail:</i> P.O. Box 886<br><i>Cable:</i> CANADIAN<br><i>Phone:</i> 255154  |
| <b>Iran</b>   | Commercial Division  | Canadian Embassy<br>Bezrouke Building<br>Corner of Takht Jamshid Ave.<br>and Forsat St.<br>TEHRAN | <i>Mail:</i> P.O. Box 1610<br><i>Cable:</i> CANTRACOM<br><i>Phone:</i> 4-9291                                      |
| <b>Ireland</b>  | P. V. McLane<br>Commercial Counsellor<br>for Canada  | 66 Upper O'Connell St.<br>DUBLIN  | <i>Mail:</i> (City Address)<br><i>Cable:</i> CANADIAN<br><i>Phone:</i> 44251                                       |
| <b>Israel</b><br>Cyprus   | B. C. Steers<br>Commercial Secretary<br>for Canada<br>(absent)<br>G. L. Gagne<br>Acting<br>Commercial Secretary  | 84 Hahashmonaim St.<br>TEL AVIV   | <i>Mail:</i> (P.O. Box 20140)<br><i>Cable:</i> CANADIAN<br><i>Phone:</i> 37161/2                                   |
| <b>Italy</b><br>(Toscana, Marche,<br>Umbria, Lazio, Abruzzi-<br>Molise, Puglia, Cam-<br>pania, Basilicata,<br>Calabria, Sicilia, Sar-<br>degna), Libya, Malta | J. H. Stone<br>Commercial Counsellor<br>W. J. Jenkins<br>Commercial Secretary<br>J. J. R. Gagnon<br>Assistant<br>Commercial Secretary  | Canadian Embassy<br>Via G. B. De Rossi 27<br>ROME   | <i>Mail:</i> (City Address)<br><i>Cable:</i> CANADIAN<br><i>Phone:</i> 864-327<br><i>Telex:</i> DOMCAN ROM 61056   |
| <b>Italy</b><br>(Emilia-Romagna, Lom-<br>bardia, Piedimonte,<br>Trentino-Alto Adige,<br>Veneto, Liguria, Trieste,<br>Valle D'Aosta, Friuli-<br>Venezia)       | A. B. Brodie<br>Consul General and<br>Trade Commissioner<br>N. R. Cumming<br>Consul and Assistant<br>Trade Commissioner  | Canadian Consulate General<br>Via Pirelli 19<br>MILAN   | <i>Mail:</i> C.P. 3977<br><i>Cable:</i> CANTRACOM<br><i>Phone:</i> 652-485/652-600<br><i>Telex:</i> 31368          |

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| <b>Jamaica</b><br>Bahamas, British<br>Honduras                               | L. D. Burke<br>Commercial Secretary<br><br>R. H. M. Cathcart<br>Assistant<br>Commercial Secretary  | Office of the High Commissioner<br>for Canada<br>32 Duke St.<br>(corner Duke and Barry Sts.)<br>KINGSTON      | <i>Mail:</i> P.O. Box 225<br><i>Cable:</i> CANADIAN<br><i>Phone:</i> 26948  |
| <b>Japan</b><br>Korea, Okinawa   | R. G. C. Smith<br>Minister (Commercial)<br><br>P. A. Savard<br>Commercial Counsellor<br><br>J. D. Blackwood<br>Commercial Secretary                        | Canadian Embassy<br>16, Omote-Machi<br>3-chome, Akasaka, Minato-ku<br>TOKYO                                   | <i>Mail:</i> Canadian Embassy<br>c/o Akasaka Post Office,<br>Tokyo<br><i>Cable:</i> CANADIAN<br><i>Phone:</i> 408-2101/8<br><i>Telex:</i> TK 2218<br>(DOMCAN TK 2218) |
| <b>Lebanon</b><br>Iraq, Jordan, Persian<br>Gulf area, Saudi Arabia,<br>Syria | L. A. Campeau<br>Commercial Counsellor<br><br>C. E. Rufelds<br>Assistant<br>Commercial Secretary<br><br>V. G. Lotto<br>Assistant<br>Commercial Secretary   | Canadian Embassy<br>Alpha Building<br>Rue Clemenceau<br>BEIRUT  | <i>Mail:</i><br>Boîte Postale 2300<br><i>Cable:</i> CANADIAN<br><i>Phone:</i> 250955  |
| <b>Malaysia</b><br>Burma, Thailand,<br>Brunei                                | Geo. Hazen<br>Acting<br>Trade Commissioner<br><br>F. M. Mulkern<br>Assistant<br>Trade Commissioner   | American International Building<br>Robinson Road and Telegraph St.<br>SINGAPORE                               | <i>Mail:</i> P.O. Box 845<br><i>Cable:</i> CANADIAN<br><i>Phone:</i> 74633  |
| <b>Mexico</b>  | M. B. Blackwood<br>Commercial Counsellor<br><br>H. S. Hay<br>Assistant<br>Commercial Secretary<br><br>J. E. G. Gibson<br>Assistant<br>Commercial Secretary | Canadian Embassy<br>Melchor Ocampo 463, 7th Floor<br>MEXICO 5, D.F.   | <i>Mail:</i> Apartado Postal 5-364<br><i>Cable:</i> CANADIAN<br><i>Phone:</i> 25-15-60<br><i>Telex:</i> 0001716   |
| <b>Netherlands</b>   | D. A. B. Marshall<br>Commercial Counsellor<br><br>J. B. McLaren<br>Assistant<br>Commercial Secretary   | Canadian Embassy<br>Sophialaan 5-7<br>THE HAGUE   | <i>Mail:</i> (City Address)<br><i>Cable:</i> CANADIAN<br><i>Phone:</i> 61-41-11<br><i>Telex:</i> 31270<br>(DOMCAN HAGUE)  |
| <b>New Zealand</b><br>Fiji, Tahiti, Tonga,<br>Western Samoa                  | W. B. McCullough<br>Commercial Counsellor<br><br>C. A. Carruthers<br>Assistant<br>Commercial Secretary   | Office of the High Commissioner<br>for Canada<br>Government Life Insurance Bldg.<br>WELLINGTON                | <i>Mail:</i> P.O. Box 1660<br><i>Cable:</i> CANADIAN<br><i>Phone:</i> 70-644<br><i>Telex:</i> WGN 9<br>(DOMCAN WGN)   |
| <b>Nigeria</b><br>Dahomey, Gambia,<br>Niger, Senegal, Sierra<br>Leone        | G. F. Mintenko<br>Commercial Secretary<br><br>R. A. Food<br>Assistant<br>Commercial Secretary  | Office of the High Commissioner<br>for Canada<br>Barclays Bank Building, 4th Floor<br>40 Marina Road<br>LAGOS | <i>Mail:</i> P.O. Box 851<br><i>Cable:</i> CANADIAN<br><i>Phone:</i> 25262  |
| <b>Norway</b><br>Iceland   | J. E. P. Lancaster<br>Commercial Secretary<br><br>M. R. Bell<br>Assistant<br>Commercial Secretary  | Canadian Embassy<br>Fridtjof Nansens Plass 5<br>OSLO 1  | <i>Mail:</i> P.O. Box 1379—Vika<br><i>Cable:</i> CANADIAN<br><i>Phone:</i> 33-30-80<br><i>Telex:</i> 1880   |
| <b>Pakistan</b><br>Afghanistan   | R. D. Sirrs<br>Commercial Secretary<br><br>R. D. Lee<br>Assistant<br>Commercial Secretary  | Office of the High Commissioner<br>for Canada<br>Hotel Metropole, Victoria Road<br>KARACHI                    | <i>Mail:</i> P.O. Box 3703<br><i>Cable:</i> CANADIAN<br><i>Phone:</i> 50322<br><i>Telex:</i> KRC 10   |

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| <b>Peru</b><br>Bolivia   | K. G. Ramsay<br>Commercial Secretary<br>(absent)<br><br>D. J. McEachran<br>Acting<br>Commercial Secretary                       | Canadian Embassy<br>Edificio Boza, Carabaya 831<br>Plaza San Martin<br>LIMA                          | <i>Mail:</i> Casilla 1212<br><i>Cable:</i> CANADIAN<br><i>Phone:</i> 72760   |
| <b>Philippines</b><br>Republic of China<br>(Taiwan)  | J. L. Mutter<br>Consul General and<br>Trade Commissioner<br><br>R. C. Anderson<br>Consul and<br>Trade Commissioner              | Canadian Consulate General<br>L & S Building, 3rd Floor<br>1414 Dewey Boulevard<br>MANILA            | <i>Mail:</i> P.O. Box 1825<br><i>Cable:</i> CANADIAN<br><i>Phone:</i> 5-85-97  |
| <b>Portugal</b><br>Angola, Azores,<br>Cape Verde Islands,<br>Madeira,<br>Portuguese Guinea   | T. J. Monty<br>Commercial Counsellor<br><br>P. A. Théberge<br>Assistant<br>Commercial Secretary                                 | Canadian Embassy<br>Rua Marques de Fronteira<br>No. 8—4° D°<br>LISBON                                | <i>Mail:</i> (City Address)<br><i>Cable:</i> CANADIAN<br><i>Phone:</i> 55-31-18  |
| <b>South Africa</b><br>(Natal, Orange Free<br>State, Transvaal)<br>Malagasy, Mauritius,<br>Mozambique, Reunion                                   | C. R. Gallow<br>Canadian Government<br>Trade Commissioner<br><br>S. B. McDowall<br>Assistant<br>Trade Commissioner              | Mobil House<br>17th Floor, Corner Rissik<br>and De Villiers Sts.<br>JOHANNESBURG                     | <i>Mail:</i> P.O. Box 715<br><i>Cable:</i> CANADIAN<br><i>Phone:</i> 834-6521  |
| <b>South Africa</b><br>(Cape Province),<br>St. Helena,<br>South West Africa  | H. W. Richardson<br>Canadian Government<br>Trade Commissioner<br><br>R. G. Godson<br>Assistant<br>Trade Commissioner            | 13th Floor<br>African Life Centre<br>St. George's St.<br>CAPE TOWN                                   | <i>Mail:</i> P.O. Box 683<br><i>Cable:</i> CANADIAN<br><i>Phone:</i> 2-5134/5  |
| <b>Southern Rhodesia</b><br>Malawi, Northern<br>Rhodesia, Seychelles Is.   | I. R. Smyth<br>Acting<br>Trade Commissioner   | 8th Floor<br>Grindlays Bank Chambers<br>Baker Ave.<br>SALISBURY                                      | <i>Mail:</i> P.O. Box 2133<br><i>Cable:</i> CANTRACOM<br><i>Phone:</i> 26571   |
| <b>Spain</b><br>Balearic Islands,<br>Canary Islands,<br>Gibraltar, Rio Muni,<br>Rio de Oro   | M. T. Stewart<br>Commercial Counsellor<br><br>R. M. Dawson<br>Commercial Secretary<br><br>C. S. Collins<br>Attaché (Commercial) | Canadian Embassy<br>Edificio Espana<br>Avenida de Jose Antonio 88<br>MADRID                          | <i>Mail:</i> Apartado 117<br><i>Cable:</i> CANADIAN<br><i>Phone:</i> 47-54-00  |
| <b>Sweden</b><br>Finland   | G. A. Browne<br>Commercial Counsellor<br><br>J. P. Bell<br>Assistant<br>Commercial Secretary                                    | Canadian Embassy<br>Strandvagen, 7-C<br>STOCKHOLM  | <i>Mail:</i> P.O. Box 14042<br><i>Cable:</i> CANADIAN<br><i>Phone:</i> 67-92-15  |
| <b>Switzerland</b><br>Tunisia  | S. G. MacDonald<br>Commercial Counsellor<br><br>B. Horth<br>Assistant<br>Commercial Secretary                                   | Canadian Embassy<br>Kirchenfeldstrasse 88<br>BERNE   | <i>Mail:</i> (City Address)<br><i>Cable:</i> CANADIAN<br><i>Phone:</i> 44-63-81<br><i>Telex:</i> 2-2386<br>(DOMCAN GENEVE) |
| <b>Trinidad and Tobago</b><br>Barbados, Leeward<br>and Windward Islands,<br>British Guiana, French<br>Guiana, Surinam,<br>Guadeloupe, Martinique | L. D. R. Dyke<br>Commercial Secretary<br><br>C. J. St. Pierre<br>Assistant<br>Commercial Secretary                              | Office of the High Commissioner<br>for Canada<br>Colonial Building<br>72 South Quay<br>PORT-OF SPAIN | <i>Mail:</i> P.O. Box 125<br><i>Cable:</i> CANADIAN<br><i>Phone:</i> 34787   |

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| <b>Union of Soviet Socialist Republics</b>  | J. M. T. Thomas<br>Commercial Secretary  | Canadian Embassy<br>23 Starokonyushenny Pereulok<br>Moscow                                     | <i>Mail:</i> (City Address)<br><i>Cable:</i> CANAD<br><i>Phone:</i> 415142   |
| <b>United Arab Republic</b><br>Aden, Sudan, Ethiopia,<br>Yemen  | W. Gibson-Smith<br>Commercial Counsellor   | Canadian Embassy<br>6 Sharia Rouston Pasha<br>Garden City<br>CAIRO                             | <i>Mail:</i> Kasr el Doubara<br>Post Office<br><i>Cable:</i> CANADIAN<br><i>Phone:</i> 23110   |
| <b>United States</b>  | W. J. Van Vliet<br>Commercial Counsellor<br>R. R. Parlour<br>Commercial Counsellor<br>W. R. Hickman<br>Commercial Secretary<br>(Agriculture)<br>N. W. Boyd<br>Commercial Secretary<br>S. G. Harris<br>Assistant<br>Commercial Secretary  | Canadian Embassy<br>1746 Massachusetts Ave., N.W.<br>WASHINGTON 36, D.C.                       | <i>Mail:</i> (City Address)<br><i>Cable:</i> CANADIAN<br><i>Phone:</i> DEcatur 2-1011<br>(Area Code 202)   |
| <b>United States</b>  | N. R. Chappell<br>Counsellor (Energy)  | Canadian Embassy<br>1746 Massachusetts Ave., N.W.<br>WASHINGTON 36, D.C.                       | <i>Mail:</i> (City Address)<br><i>Cable:</i> CANADIAN<br><i>Phone:</i> DEcatur 2-1011<br>(Area Code 202)   |
| <b>United States</b><br>(Connecticut, the eleven<br>northern counties of<br>New Jersey, New York)<br>Bermuda  | C. J. Van Tighem<br>Deputy Consul General<br>(Commercial)<br>A. A. Lomas<br>Consul and<br>Trade Commissioner<br>W. G. Huxtable<br>Consul and<br>Trade Commissioner<br>C. G. Bullis<br>Consul and Assistant<br>Trade Commissioner<br>J. D. Welsh<br>Vice Consul and Assistant<br>Trade Commissioner | Canadian Consulate General<br>680 Fifth Ave.<br>NEW YORK CITY 19                               | <i>Mail:</i> (City Address)<br><i>Cable:</i> CANTRACOM<br><i>Phone:</i> JUdson 6-2400<br><i>Night Line:</i> JUdson 6-2321<br>(Area Code 212)<br><i>Telex:</i> 0-01-26242 |
| <b>United States</b><br>(Maine, Massachusetts,<br>New Hampshire, Rhode<br>Island, Vermont)  | M. R. M. Dale<br>Consul and Senior<br>Trade Commissioner<br>W. A. Stewart<br>Consul and<br>Trade Commissioner<br>D. S. Baker<br>Vice Consul and Assistant<br>Trade Commissioner  | Canadian Consulate General<br>607 Boylston St.<br>BOSTON 16                                    | <i>Mail:</i> (City Address)<br><i>Phone:</i> 262-3760<br>(Area Code 617)<br><i>Telex:</i> 0-094-567  |
| <b>United States</b><br>(Illinois, North Dakota,<br>South Dakota, Minnesota,<br>Wisconsin, Indiana, Iowa,<br>Kansas, Kentucky,<br>Missouri, Nebraska) | D. H. Cheney<br>Consul and Senior<br>Trade Commissioner<br>V. B. Chew<br>Consul and<br>Trade Commissioner<br>R. H. Gayner<br>Consul and Assistant<br>Trade Commissioner<br>M. Rowan<br>Consul and Assistant<br>Trade Commissioner<br>L. G. Lee<br>Vice Consul and Assistant<br>Trade Commissioner  | Canadian Consulate General<br>310 South Michigan Ave.<br>Suite 2000<br>CHICAGO, ILLINOIS 60604 | <i>Mail:</i> (City Address)<br><i>Phone:</i> 427-7926<br>(Area Code 312)<br><i>Telex:</i> 0-025-571  |

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| United States<br>(Ohio)   | A. W. Evans<br>Consul and<br>Trade Commissioner<br><br>N. L. Currie<br>Consul and Assistant<br>Trade Commissioner   | Canadian Consulate<br>Illuminating Building<br>55 Public Square<br>CLEVELAND                 | <i>Mail:</i> (City Address)<br><i>Phone:</i> 861-1660<br>(Area Code 216)<br><i>Telex:</i> 098 5364         |
| United States<br>(Michigan)   | I. V. Macdonald<br>Consul and<br>Trade Commissioner<br><br>K. D. Taylor<br>Consul and Assistant<br>Trade Commissioner   | Canadian Consulate<br>1139 Penobscot Building<br>DETROIT, MICHIGAN 48226                     | <i>Mail:</i> (City Address)<br><i>Phone:</i> WOODWARD 5-2811<br>(Area Code 313)<br><i>Telex:</i> 0-023-445 |
| United States<br>California (the ten south-<br>ern counties), Clark<br>County in Nevada,<br>Arizona, New Mexico   | F. B. Clark<br>Consul and<br>Trade Commissioner<br><br>L. J. Taylor<br>Consul and Assistant<br>Trade Commissioner<br><br>J. R. Suggitt<br>Vice Consul and Assistant<br>Trade Commissioner | Canadian Consulate General<br>510 West Sixth St.<br>LOS ANGELES 14                           | <i>Mail:</i> (City Address)<br><i>Phone:</i> MADISON 2-2233<br>(Area Code 213)<br><i>Telex:</i> 0-06-74119 |
| United States<br>(Louisiana, Texas,<br>Oklahoma, Arkansas,<br>Mississippi, Tennessee,<br>Alabama, North<br>Carolina, South Carolina,<br>Georgia, Florida) | G. E. Blackstock<br>Consul and Acting<br>Trade Commissioner   | Canadian Consulate General<br>Suite 1710<br>225 Baronne St.<br>NEW ORLEANS 12                | <i>Mail:</i> (City Address)<br><i>Phone:</i> JACKSON 5-2136<br>(Area Code 504)<br><i>Telex:</i> 0-058-237  |
| United States<br>(Delaware, Maryland,<br>the nine southern coun-<br>ties of New Jersey,<br>Pennsylvania, Virginia,<br>West Virginia)                      | W. J. Millyard<br>Consul and<br>Trade Commissioner<br><br>R. F. Turcotte<br>Consul and Assistant<br>Trade Commissioner  | Canadian Consulate<br>3 Penn Center Plaza<br>PHILADELPHIA 2                                  | <i>Mail:</i> (City Address)<br><i>Cable:</i> CANADIAN<br><i>Phone:</i> LOCUST 35838<br>(Area Code 215)     |
| United States<br>California (except the ten<br>southern countries),<br>Wyoming, Nevada (ex-<br>cept Clark County),<br>Utah, Colorado, Hawaii              | Consul General  | Canadian Consulate General<br>333 Montgomery St.<br>SAN FRANCISCO 4                          | <i>Mail:</i> (City Address)<br><i>Phone:</i> YUKON 1-2670<br>(Area Code 415)<br><i>Telex:</i> 0-03-431     |
| United States<br>(Oregon, Idaho,<br>Washington,<br>Montana), Alaska   | Consul General  | Canadian Consulate General<br>The Tower Building<br>Seventh Avenue at Olive Way<br>SEATTLE 1 | <i>Mail:</i> (City Address)<br><i>Phone:</i> MUTUAL 2-3515<br>(Area Code 206)<br><i>Telex:</i> 0-032-462   |
| Uruguay<br>Falkland Islands   | Commercial Division   | Canadian Embassy<br>No. 1409 Avenida Agraciada<br>Piso 7°<br>MONTEVIDEO                      | <i>Mail:</i><br>Casilla Postal 852<br><i>Cable:</i> CANADIAN<br><i>Phone:</i> 96096                        |
| Venezuela<br>Netherlands Antilles   | W. D. Wallace<br>Commercial Counsellor<br><br>J. R. Caux<br>Assistant<br>Commercial Secretary   | Canadian Embassy<br>Avenida La Estancia No. 10<br>Ciudad Comercial Tamanaco<br>CARACAS       | <i>Mail:</i> Apartado 11452-Este<br><i>Cable:</i> CANADIAN<br><i>Phone:</i> 32.40.41.44                    |

The following nominal quotations may prove useful in checking prices. Canadian traders should consult their banks before making any firm commitments.

Conversion into Canadian dollar equivalent and units of foreign currency per Canadian dollar have been made at cross rates with sterling or the United States dollar on the date shown.

Except when buying and selling rates are specified, the mid rates only are quoted. The buying rate is that at which banks purchase exchange from exporters. The selling rate is that at which banks sell exchange to importers.

When several rates are indicated, the rate applicable depends on the commodity traded. Information on the rate for any specific commodity may be obtained from the Office of Trade Relations and Trade Policy, Department of Trade and Commerce, Ottawa.

Rates used exclusively in non-merchandise trading are not included in the table.

For conversion to United States dollar equivalent multiply by .92969.

## Foreign Exchange Rates

| Country                           | Unit            | Type of Exchange    | Can. dollar equivalent Oct. 5 | Units per Canadian dollar | Notes (see below) |
|-----------------------------------|-----------------|---------------------|-------------------------------|---------------------------|-------------------|
| Algeria .....                     | Dinar .....     | .....               | .2195                         | 4.56                      |                   |
| Argentina .....                   | Peso .....      | Free .....          | .007524                       | 132.91                    |                   |
| Australia .....                   | Pound .....     | .....               | 2.3948                        | .4176                     |                   |
| Austria .....                     | Schilling ..... | .....               | .04165                        | 24.01                     |                   |
| Bahamas .....                     | Pound .....     | .....               | 2.9935                        | .3341                     |                   |
| Belgium and<br>Luxemburg .....    | Franc .....     | .....               | .02167                        | 46.15                     |                   |
| Bermuda .....                     | Pound .....     | .....               | 2.9935                        | .3341                     |                   |
| Bolivia .....                     | Peso .....      | .....               | .09065                        | 11.03                     |                   |
| Brazil .....                      | Cruzeiro .....  | Official Free ..... | .0006290                      | 1,589.83                  |                   |
| Britain .....                     | Pound .....     | .....               | 2.9935                        | .3341                     |                   |
| British Guiana .....              | Dollar .....    | .....               | .6236                         | 1.60                      |                   |
| British Honduras .....            | Dollar .....    | .....               | .7484                         | 1.34                      |                   |
| Burma .....                       | Kyat .....      | .....               | .2259                         | 4.43                      |                   |
| Ceylon .....                      | Rupee .....     | .....               | .2245                         | 4.45                      |                   |
| Chile .....                       | Escudo .....    | Bank rate .....     | .4472                         | 2.24                      |                   |
|                                   |                 | Free .....          | .3335                         | 3.00                      |                   |
| Colombia .....                    | Peso .....      | Free .....          | .1077                         | 9.29                      |                   |
|                                   |                 | Certificate .....   | .1195                         | 8.37                      |                   |
| Congo, Republic of .....          | Franc .....     | .....               | .007171                       | 139.45                    | (1)               |
| Costa Rica .....                  | Colon .....     | .....               | .1624                         | 6.16                      |                   |
| Cuba .....                        | Peso .....      | .....               | †                             | †                         |                   |
| Czechoslovakia .....              | Koruna .....    | .....               | .1494                         | 6.69                      |                   |
| Denmark .....                     | Krone .....     | .....               | .1553                         | 6.44                      |                   |
| Dominican Republic .....          | Peso .....      | .....               | 1.07563                       | .9297                     |                   |
| Ecuador .....                     | Sucre .....     | Official .....      | .05976                        | 16.73                     |                   |
|                                   |                 | Free .....          | .05808                        | 17.22                     |                   |
| El Salvador .....                 | Colon .....     | .....               | .4303                         | 2.32                      |                   |
| Fiji .....                        | Pound .....     | .....               | 2.6968                        | .3708                     |                   |
| Finland .....                     | Markka .....    | .....               | .3361                         | 2.98                      |                   |
| France, Monaco,<br>etc. ....      | Franc .....     | .....               | .2195                         | 4.56                      | (2)               |
| Franco-African Republics, etc. .. | Franc .....     | .....               | .004390                       | 227.79                    | (3)               |
| French Pacific .....              | Franc .....     | .....               | .01207                        | 82.85                     | (4)               |
| Germany .....                     | D Mark .....    | .....               | .2706                         | 3.70                      |                   |
| Ghana .....                       | Pound .....     | .....               | 2.9935                        | .3341                     |                   |
| Greece .....                      | Drachma .....   | .....               | .03585                        | 27.89                     |                   |
| Guatemala .....                   | Quetzal .....   | .....               | 1.07563                       | .9297                     |                   |
| Haiti .....                       | Gourde .....    | .....               | .2151                         | 4.65                      |                   |
| Honduras .....                    | Lempira .....   | .....               | .5378                         | 1.86                      |                   |
| Hong Kong .....                   | Dollar .....    | Free .....          | .1865                         | 5.3620                    | * Sept. 18        |
|                                   |                 | Official .....      | .1871                         | 5.3447                    |                   |

†There is no trading in Cuban pesos in U.S. or Canadian banks at present.

\*Latest available date.

| Country                | Unit    | Type of Exchange | Can. dollar equivalent Oct. 5 | Units per Canadian dollar | Notes (see below) |
|------------------------|---------|------------------|-------------------------------|---------------------------|-------------------|
| Iceland                | Krona   | Official         | .02501                        | 39.98                     | (1)               |
| India                  | Rupee   |                  | .2245                         | 4.45                      |                   |
| Indonesia              | Rupiah  |                  | .004303                       | 232.40                    | (1)               |
| Iran                   | Rial    |                  | .01420                        | 70.42                     |                   |
| Iraq                   | Dinar   |                  | 3.0118                        | .3320                     |                   |
| Ireland                | Pound   |                  | 2.9935                        | .3341                     |                   |
| Israel                 | Pound   |                  | .3585                         | 2.79                      |                   |
| Italy                  | Lira    |                  | .001721                       | 581.06                    |                   |
| Japan                  | Yen     |                  | .002988                       | 334.67                    |                   |
| Lebanon                | Pound   | Free             | .3415                         | 2.93                      |                   |
| Malaysia               | Dollar  |                  | .3514                         | 2.85                      |                   |
| Mexico                 | Peso    |                  | .08605                        | 11.62                     |                   |
| Morocco                | Dirham  |                  | .2151                         | 4.65                      |                   |
| Netherlands            | Florin  |                  | .2984                         | 3.35                      |                   |
| Netherlands Antilles   | Florin  |                  | .5704                         | 1.75                      |                   |
| New Zealand            | Pound   |                  | 2.9731                        | .3363                     |                   |
| Nicaragua              | Cordoba |                  | .1537                         | 6.51                      |                   |
| Nigeria                | Pound   |                  | 2.9935                        | .3341                     |                   |
| Norway                 | Krone   |                  | .1502                         | 6.66                      |                   |
| Pakistan               | Rupee   |                  | .2245                         | 4.45                      |                   |
| Panama                 | Balboa  |                  | 1.07563                       | .9297                     |                   |
| Paraguay               | Guarani | Free             | .008503                       | 117.61                    |                   |
| Peru                   | Sol     | Free             | .04010                        | 24.94                     |                   |
| Philippines            | Peso    | Free             | .2762                         | 3.62                      |                   |
| Portugal & Colonies    | Escudo  |                  | .03741                        | 26.73                     | (5)               |
| Sierra Leone           | Leones  |                  | 1.5059                        | .6641                     |                   |
| South Africa           | Rand    |                  | 1.4968                        | .6681                     |                   |
| Spain and Dependencies | Peseta  |                  | .01793                        | 55.77                     |                   |
| Sweden                 | Krona   |                  | .2088                         | 4.79                      |                   |
| Switzerland            | Franc   |                  | .2490                         | 4.02                      |                   |
| Syria                  | Pound   | Free             | .2816                         | 3.55                      |                   |
| Thailand               | Baht    | Free             | .05103                        | 19.60                     | (1)               |
| Tunisia                | Dinar   |                  | 1.9361†                       | .5165†                    |                   |
| Turkey                 | Lira    |                  | .1195                         | 8.37                      | (1)               |
| United Arab Republic   | Pound   | Official         | 2.4739                        | .4042                     |                   |
| United States          | Dollar  |                  | 1.075625                      | .92969                    |                   |
| Uruguay                | Peso    | Free             | .05122                        | 19.52                     |                   |
| Venezuela              | Bolivar | Official Free    | .2396                         | 4.17                      |                   |
| West Indies            | Dollar  |                  | .6236                         | 1.60                      | (6)               |
|                        | Pound   |                  | 2.9935                        | .3341                     | (7)               |
| Yugoslavia             | Dinar   | Official         | .001434                       | 697.35                    |                   |

†25% devaluation: Sept. 29, 1964.

## Notes

1. Additional rates are in effect.
2. Franc is also used in French Guiana, Guadeloupe and Martinique.
3. Chad, Central African Republic, Congo, Dahomey, Gabon, Ivory Coast, Mali, Islamic Republic of Mauritania, Niger, Senegal, Upper Volta, Camerouns, Togoland, and Malagasy. Also Reunion, Comoro Islands, St. Pierre and Miquelon.
4. New Caledonia, New Hebrides, French Polynesia.
5. Portugal: approximately same rate for Portuguese territories in Africa.
6. Barbados, Trinidad and Tobago, Leeward and Windward Islands.
7. Jamaica.

# New Zealand Boosts Its Trade Again

TABLE I  
NEW ZEALAND'S TRADE BY COMMODITY

|  | Exports<br>(millions of Can.\$) |                | Imports<br>(millions of Can.\$) |              |                |
|--|---------------------------------|----------------|---------------------------------|--------------|----------------|
|  | Year ended June                 |                | Year ended June                 |              |                |
|  | 1963                            | 1964           | 1963*                           | 1964*        | 1964†          |
| Food and live animals (exports—mostly meat, butter and cheese)                         | 479.5                           | 534.5          | 53.0                            | 73.0         | 85.3           |
| Beverages and tobacco  | .9                              | .9             | 11.4                            | 10.5         | 12.0           |
| Crude materials, inedible, except fuels (exports—mostly wool)                          | 390.9                           | 497.4          | 34.1                            | 41.3         | 59.0           |
| Mineral fuels, lubricants, and related materials                                       | .....                           | .....          | 66.4                            | 71.5         | 86.5           |
| Animal and vegetable oils and fats   | 7.5                             | 11.1           | 1.5                             | 1.8          | 1.8            |
| Chemicals  | 13.5                            | 18.2           | 71.5                            | 82.9         | 87.1           |
| Manufactured goods classified chiefly by material                                      | 16.2                            | 21.8           | 250.5                           | 280.7        | 299.0          |
| Machinery and transport equipment  | 1.5                             | 2.1            | 233.1                           | 311.6        | 324.1          |
| Miscellaneous manufactured articles  | .9                              | 1.8            | 53.0                            | 62.0         | 63.7           |
| Commodities and transactions not classified according to kind                          | .3                              | .....          | 5.1                             | 3.9          | 3.9            |
|  | <b>910.7</b>                    | <b>1,088.2</b> | <b>779.0</b>                    | <b>938.9</b> | <b>1,022.4</b> |
| Re-exports   | 13.2                            | 13.2           | .....                           | .....        | .....          |
| <b>Total exports (including gold and specie) and imports (including gold and coin)</b> | <b>923.9</b>                    | <b>1,101.4</b> | <b>779.0</b>                    | <b>938.9</b> | <b>1,022.4</b> |

\*c.d.v. basis.

†c.i.f. basis.

TABLE II  
EXPORTS TO PRINCIPAL MARKETS

| Country       | Year ended June      |       |
|---------------|----------------------|-------|
|               | 1963                 | 1964  |
|               | (millions of Can.\$) |       |
| Britain       | 426.5                | 515.1 |
| United States | 155.6                | 159.8 |
| France        | 59.6                 | 65.8  |
| Japan         | 38.0                 | 47.9  |
| Australia     | 37.7                 | 46.7  |
| West Germany  | 29.6                 | 39.2  |
| Italy         | 28.4                 | 36.8  |
| Belgium       | 23.3                 | 32.6  |
| Netherlands   | 14.1                 | 19.4  |
| Canada        | 13.2                 | 12.9  |

TABLE III  
NEW ZEALAND'S IMPORTS  
BY CATEGORY

|   | Year ended June          |                |
|---|--------------------------|----------------|
|   | 1963                     | 1964           |
|   | (millions Can.\$ c.i.f.) |                |
| Road motor vehicles   | 76.9                     | 112.8          |
| Machinery, other than electric                              | 98.5                     | 124.5          |
| Food and live animals                                       | 65.2                     | 85.3           |
| Electrical machinery, apparatus and appliances              | 56.6                     | 71.5           |
| Chemicals   | 75.4                     | 87.1           |
| Textile yarn, fabric, made-up articles and related products | 100.0                    | 111.0          |
| Crude materials, inedible, except fuels                     | 48.8                     | 59.0           |
| Iron and steel  | 71.5                     | 81.1           |
| Petroleum products  | 79.9                     | 86.5           |
| Other   | 188.0                    | 203.5          |
| <b>Totals (including gold and coin)</b>                     | <b>860.8</b>             | <b>1,022.4</b> |

NEW ZEALAND'S balance of trade, at \$162.5 million, was again favourable for the fiscal year ended June 30, 1964, up from the previous year's figure of \$144.8 million. Exports for the year were the highest ever recorded, at an estimated value of \$1,101.4 million, compared with \$923.9 million in 1962-63. The provisional total value of imports for 1963-64 was also the highest ever at \$938.9 million c.d.v., (current domestic value), or \$1,022.4 million c.i.f. The previous year's total was \$779.0 million, c.d.v.

The major contributor to export earnings in the latest year was wool, with a value of \$405.8 million. Meat and meat preparations came next, accounting for \$274.1 million, followed by butter (\$163.7 million), cheese (\$52.4 million), hides and skins (\$44.3 million), and sausage casings (\$18.0 million). Of the principal products, wool showed the greatest advance in value, 29.6 per cent over the preceding year. Increases in other major commodities included: hides and skins 23.6 per cent, butter 20.6, sausage casings 16.7, and meat preparations 8.4. Returns for cheese, however, decreased by 3.4 per cent compared with 1963.

Three countries—Belgium, the Netherlands, and West Germany, in that order—showed the greatest rise in imports from New Zealand. Except for Canada, the value of its exports to all major markets increased, as shown in Table II. Together these countries account for 89 per cent of New Zealand's export trade.

The increase of \$159.9 million (c.d.v. basis) in New Zealand's imports over the past year by principal categories is shown in Table III.

All figures are of the value of goods arriving in New Zealand. The exchange transactions involved in paying for imports are recorded separately by the Reserve Bank and for various reasons the two sets of figures differ.

—Office of the Commercial  
Counsellor, Wellington.



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