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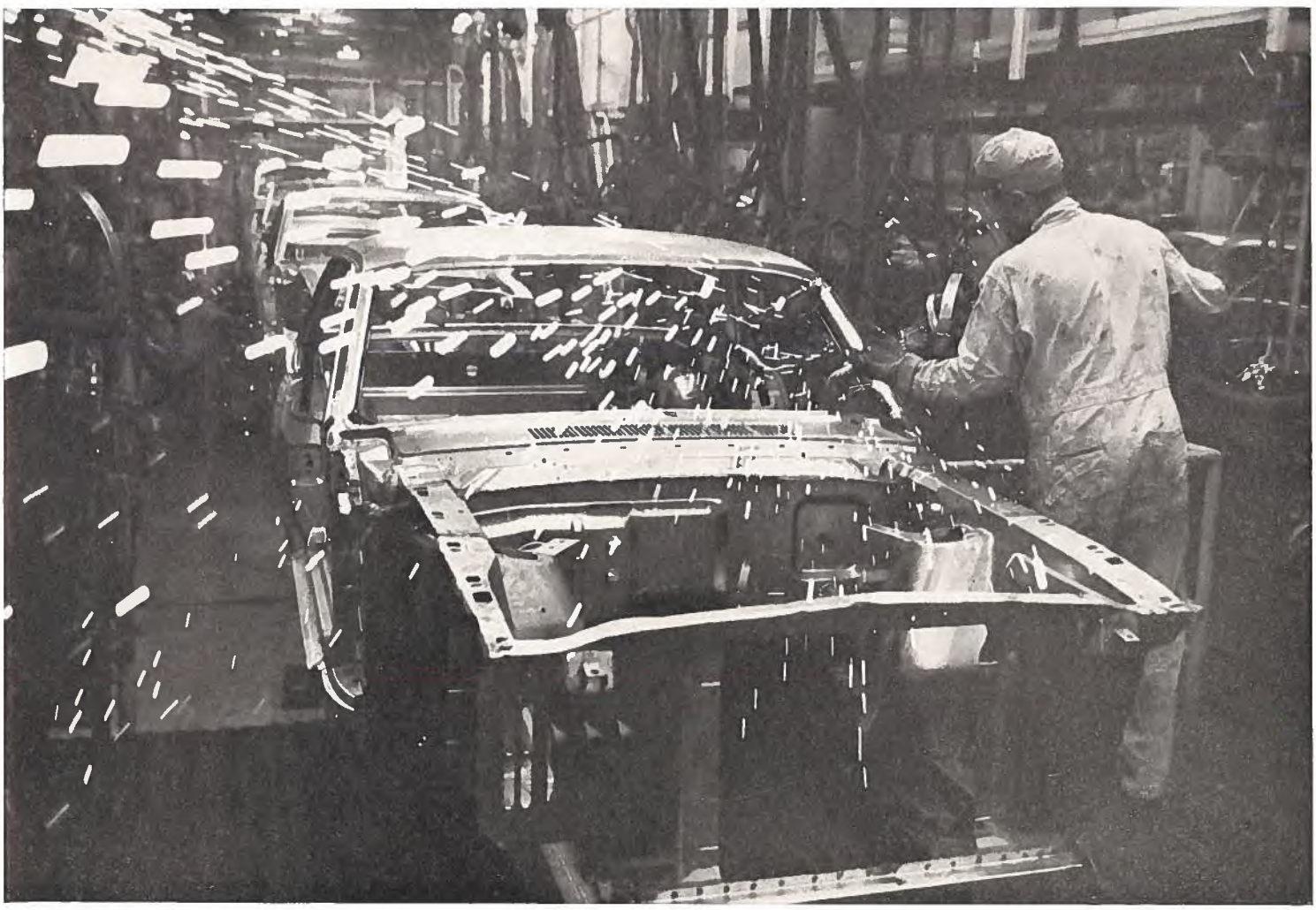
FOREIGN TRADE

DEPARTMENT OF TRADE AND COMMERCE, OTTAWA



Selling to the U.S. Automotive Market

FOREIGN TRADE

NOVEMBER 25, 1967 Vol. 128 No. 11

COVER: A worker spot-welds panelling on a Mustang at Ford Motor Company's Dearborn plant. The cradle in the foreground holds parts in position within a tolerance of one thousandth of an inch. Automotive manufacturers demand a high standard of quality from suppliers and may insist on intensive laboratory tests before they begin to discuss commercial aspects of the deal.

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COMING—TRADE AND DEVELOPMENT IN CONTINENTAL EFTA, DECEMBER 9

Inspectors examine trucks at Chrysler's St. Louis, Missouri, assembly plant.

Selling to the U.S. Automotive Market

Tailoring Your Sales Approach

Are you looking for orders from the big U.S. automotive plants? You can't get them by staying at home or writing letters. Call in person, make the type of presentation expected, and follow up.

H. S. HAY, *Consul and Trade Commissioner, Detroit.*

MORE THAN TWO YEARS of watching the metamorphosis of the motor industry as a result of the Auto Pact, which provides for duty-free entry for original equipment, have convinced us here in Detroit that the biggest adjustment that Canadians need to make is in their sales approach. Many have successfully made the transition and many more could.

Canada's parts industry before the Automotive Agreement was accustomed to dealing in a small market and the average product mix was large. Buying locations were few. As a consequence, the parts industry became production-oriented and developed a tradition of ingenuity in handling a multiplicity of short runs. Merchandising was comparatively informal.

Suddenly the situation has changed. The Canadian parts producer now is supplying a combined Canadian-U.S. market. While the number of competitors is many times as great in any product line, the marketplace is, of course, proportionately larger; it is also different. There are a bewildering number of buying locations in the area and an organized selling pattern to which Canadian vendors must conform.

No Reason for Open Capacity

There is no question about Canadian manufacturers turning out as good a product as their U.S. counterparts. We hear few complaints and many compliments on this score. Canada is still regarded as the home of craftsmen. But some of our vendors are not making the impact they should. With the total market increasing, there is no reason for any Canadian plant which produces a fundamentally competitive product not to be working at full capacity. Canadian firms currently enjoying the greatest success are those with an organized marketing program which conforms to the well-established American approach to selling.

A good buyer is always interested in new vendors, regardless of their nationality. It is to his credit if he can purchase a comparable part for less or get a better part for the same price. Parts buyers have welcomed the influx of new sources made possible by the Auto Pact. There is no evidence that Canadian vendors are not receiving as warm a reception as their U.S. competition. (To our knowledge, only where buyers have been confronted with border problems or with ineffective selling have they actually turned sour on Canadian sources.) A U.S.-based buyer is neither familiar with nor tolerant of the special problems related to a trans-border movement. This responsibility must be taken only by the seller —if he wants to interest a U.S. buyer. Understandably, the U.S. buyer plagued by border problems will eventually take the path of least resistance and buy from a U.S. source.

Compete on Performance

Despite all the competition there is as a rule a great deal of loyalty to vendors. After all, every plant has to meet certain criteria before being approved. Every part must conform to minimum quality standards before being accepted. Price comparisons are constantly being made. The critical area for competition thus becomes performance—performance leading up to the sale, performance in honouring contractual commitments, and special performance when the buyer is in a spot. This is what engenders vendor loyalty.

The auto assemblers have a big stake in the ability of each and every one of their suppliers, whether single or multiple sourcing. There are upwards of 15,000 parts in a car. Failure by even one supplier to meet commitments can put an enormous company into enormous difficulties. For this reason the assemblers are willing to spend much time and energy on working with their vendors to solve mutual problems.

The first call by a potential new vendor is especially important. He must present himself, his company, and his product in such a way as to lay the foundations for confidence and loyalty. The initial introduction must be in person. Some companies, as a policy, actually file introductory letters in their wastebaskets. The typical reaction of the buyer is that if a new vendor is not serious enough to approach him personally, he is unlikely to merit serious consideration. The best initial contact may be a purchasing co-ordinator, a purchasing agent, or a product buyer. Officers at the Consulate in Detroit call regularly upon all these people throughout Michigan and can assist you in establishing your contacts.

Approach with Confidence

The first presentation should be designed to arouse the buyer's interest, inspire confidence, and create an impression of reliability. The Canadian should come armed with a complete list of facilities, plus literature and sales catalogues and, where possible, samples. He should also leave with the buyer a company resumé, with the following information:

Name and address of the manufacturer

Senior executives

Number of employees

Years in business

Products

Principal customers

Experience of key technical people

Manufacturing, engineering and testing facilities

Production capabilities of machines or lines

A general financial statement.

It is to the advantage of the Canadian seller to be well briefed on the Auto Pact itself and on border matters with which he will have to cope, so that he can sit down with the buyer and talk to him in his language.

Some Canadians seem to hold U.S. automotive buyers in awe. They really are quite approachable. In Michigan especially, every second one goes fishing, hunting or camping in Canada regularly, and will want to tell you about it. This year many, of course, went to Expo. There is little difficulty in finding an affinity of interests. Buyers located in Detroit, as in any big city, tend to be more harried than their colleagues in smaller centres, but many key purchasing locations are in the latter.

Follow-Up Needed

The intensity of follow-up is a major difference between the Canadian and the U.S. approaches. Canadian vendors have complained to us that they have visited Detroit, been given blueprints upon which they quoted, then heard no more. They have failed to realize that they were expected to follow up their quotation regularly and persistently. To the buyer this is proof of genuine interest. The successful vendor is the one whose representative appears in a given plant lobby every second Thursday at 10 a.m. and calls on the house telephone to ask if there is anything for him that day or if there are any problems. His call is expected, indeed looked forward to, and keeps him on top of all that is happening.

Forget about doing business directly from your plant (or by mail). This is just not the way of the automotive industry. And if you are dealing with the car companies especially and do not have a member of your firm who can call upon each account every two to three weeks, appoint an agent. Manufacturers' representatives are employed throughout the industry both by corporate giants and small suppliers. They make money only if their principal does.

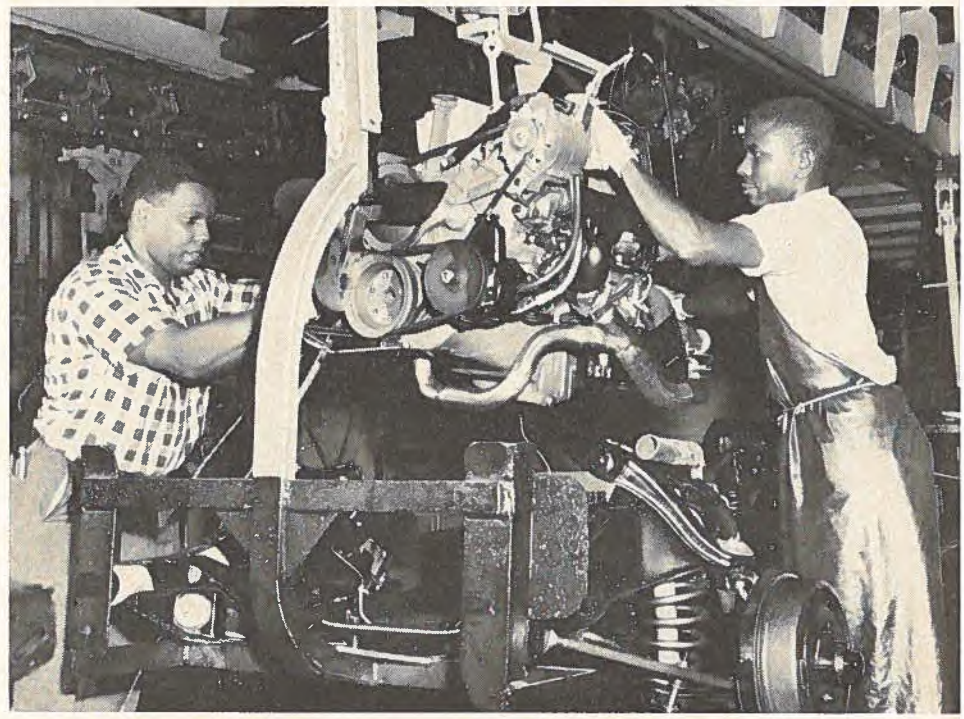
An agent acts as a commission salesman. His business cards carry his principal's name. He needs his principal's support in accompanying him on periodic visits to his buying connections. The well-selected agent comes with a set of existing buyer contacts. But don't press for overnight results. We know of one experienced and persistent agent who called upon a buyer twenty times before getting a part on which to quote! Particularly during the introductory period he needs all his principal's help just as a direct sales representative would. (We have in our Consulate files information on several hundred automotive representatives in the Detroit and southern Michigan areas. Many are looking for specific Canadian lines.)

Follow-up on contractual commitments is just as important as making the sale. In the new combined Canada-U.S. context the "temporary buys" that have "backstopped" Canadian vendors are a thing of the past. Small inventories, tight scheduling, and lots of pressure are the rule. Failure to adhere to time commitments cannot be tolerated. And this applies to bid dates as well as delivery dates.

Don't Hold Back

Finally, we know of a few Canadian manufacturers who are hanging back until they can make their move into the new marketplace "under optimum conditions". This is not always possible and we urge the businessman not to wait but to contact us during preliminary planning so that we can advise on his approach.

Buying is already well under way for the important 1969 model year. If it is not shaping up to your complete satisfaction, let's get together and discuss the situation. ●



Workmen lower an engine into position on the chassis with the aid of an electrically-controlled hoist in the General Motors Corporation's Detroit plant.

The Challenge to Automotive Stampers

An authoritative U.S. study of the Automotive Agreement reaches some conclusions that are of definite interest to Canadian stampers.

H. S. HAY, *Consul and Trade Commissioner, Detroit.*

MANY CANADIAN STAMPERS are aware of the investigation that Dr. Henrik Helmers of the University of Michigan has been making of the United States and Canadian automotive stamping industries. Dr. Helmers' study* has now been published. It is recommended reading for Canadian automotive stampers and all others interested in the Auto Pact.

Dr. Helmers estimates that approximately 52 per cent by value of the automotive stampings produced come from independent as opposed to captive stampers. This proportion appears to have remained stable in recent years and there is no indication that it will change. He foresees continued growth in the use of stampings. Hence over-all prospects for independent U.S. and Canadian stampers remain good.

Dr. Helmers estimates that 70 per cent of the automotive stampers in the U.S. are located in the states of Michigan, Ohio and Indiana, where mass production has been centralized close to the heart of the automotive industry and close to the source of raw materials. In Canada, the corresponding area is the southwestern part of Ontario.

Product Mix Is Different

Independent stampers in the U.S. have tended to concentrate on small stampings, often because of their ability to make these stampings more economically than captive plants, their ability to handle harder-to-make stampings, and their willingness to take on lower volume orders. Because of this and the greater numbers involved, they have been able to achieve somewhat more specialization.

The author finds that Canada has proportionately a very large number of independent stampers—some 25 per cent of the U.S. total. Traditionally the Canadians have maintained a more even mix of small and medium-sized stampings and a greater product diversity. Rather than specializing, they have tended to produce for a variety of models.

Production facilities in Canada and the U.S. were found to be much the same. On both sides of the border the stamper has only one thing to sell: "his capability to produce a stamping, part of a given design according to a given set of specifications". In the United States the bulk of the output of the independent stampers goes to the Big Four—General Motors, Ford, Chrysler, and American Motors—through a diversity of buying locations. Because of the number of stampers, the fact that many specialize in the same product, and the keen competition from captive facilities, over-all competition is intense.

Competition Keen in U.S.

Before thc Auto Pact, there was in Canada a greater variety of parts and only a handful of buying locations. Less than 20 per cent of Canadian stampers apparently used manufacturers' representatives or direct salesmen. In most instances, sales seem to have been handled by the owner or manager in addition to his other duties. In the United States, by contrast, over 80 per cent of the stampers had direct sales forces, manufacturers' representatives, or both. Marketing has therefore become more complex and frequent personal contact with buyers is the rule.

Dr. Helmers suggests that with the border now open, components for the assembly plants in Canada can be bought wherever it is most profitable, whether in Canada or the United States. Canadian stampers must seek their livelihood in a combined two-country market five times as large as previously. They must sell as their U.S. competitors do and build up an entirely new set of contacts.

Furthermore, up to half of the product mix traditionally produced in Canadian plants has consisted of medium-sized stampings which, in the United States, are normally produced in captive plants.

It is possible that in Canada too the trend may be to captive production, leaving some Canadian stampers with idle capacity to be filled with the smaller stampings usually associated with independent stampers. Canadian manufacturers may therefore have a double adjustment to make.

Here at the Consulate in Detroit, we can suggest itineraries for Canadian stampers wishing to make an initial round of calls upon buyers in the State of Michigan whom we have contacted and who have indicated an interest in seeing Canadian stampings vendors. We will be delighted to sit down with any interested stamper and prepare a sales campaign for him.

**The United States-Canadian Automobile Agreement* by Dr. Henrik O. Helmers, Institute for International Commerce, Graduate School of Business Administration, University of Michigan, Ann Arbor, Michigan. Price $5.50.

Truck Manufacturers Need Parts Too

The United States produces trucks to meet every kind of operating conditions. This means relatively small orders for many components and provides Canadians with a golden opportunity to sell.

V. G. LOTTO, *Consul and Assistant Trade Commissioner, Detroit.*

TWO MILLION TRUCKS are produced each year in North America, 90 per cent of them in the United States. Because original parts for trucks enter duty-free from Canada, Canadian parts manufacturers will find this market well worth investigating. Truck production has been growing faster than car production in North America. There was a slight drop in the U.S. output from 1,785,100 units in 1965 to 1,750,000 in 1966 but this was more than compensated by the rise in Canada. Stimulated by the Canada-United States Automotive Agreement, our production went up from 143,289 units in 1965 to 200,884 in 1966.

There are at present 15.5 million trucks registered in the United States and their average age is 7.83 years. It is estimated that a million trucks and buses were scrapped in 1966. "Scrappage", together with the increased use of trucks for inter-city shipments (52 per cent of manufacturers' goods go by truck) and more trucks on the farm explain the increased production. One truck in five in the United States is a farm truck and there is a trend to pick-ups as second cars.

TABLE I

UNITED STATES PRODUCTION OF TRUCKS AND BUSES

	1964	1965	1966
Chevrolet	523,791	619,690	621,353
Ford	458,583	563,137	553,719
International	166,892	171,638	170,385
Dodge	135,630	143,452	153,139
GMC	110,521	136,705	127,705
Kaiser Jeep	120,830	108,591	99,624
White	21,342	27,316	32,422
Mack	14,173	20,269	19,579
FWD	1,123	1,496	1,619
All Others	9,483	10,309	12,452
Total	**1,562,368**	**1,802,603**	**1,791,586**

According to a U.S. Department of Commerce survey, 78.4 per cent of trucks are in the light and medium range and 16.5 are "light-heavy" or "heavy-heavy". Most of the 129 companies on the United States bona fide vehicle manufacturers' list produce trucks or truck bodies; these bona fide motor vehicle manufacturers and their sub-contractors can import Canadian parts duty-free for incorporation into new vehicles.

Custom-Built Heavy Trucks

Light and medium trucks are mass-produced. Many heavy trucks, on the other hand, have quite specific uses, with the manufacturer selling one or two special models in a particular region. The more successful companies are gradually extending their distribution across the country.

A multitude of models and options is characteristic of the truck field. One of the larger manufacturers in describing its 1968 line mentions more than 750 models to meet virtually any hauling requirement. Dealers often complain about the wide selection and would prefer standardization, but the multiplicity of models works to the advantage of suppliers of low-volume parts. The smaller manufacturer can quote competitively on low- to medium-volume runs for a particular model. He can even sell to the giants of the industry though his firm can only produce in medium volume.

The smaller companies specializing in heavy trucks are well worth attention. They owe their survival to high quality and the custom nature of their products. The purchasing agent for one of them recently told me that he is always looking for better quality parts. If he has to spend an additional amount on an item to get greater durability, he does. The longer life of the component might save his customer hundreds of dollars in the long term.

Heavy trucks built by different firms may have a number of components in common. For instance, the diesel engines may come from Detroit Diesel or Cummins, the transmissions from Dana or Clark, and the axles from Rockwell or Eaton. These companies are as eager to hear from new suppliers as are the truck manufacturers themselves.

New Sources Sought

Model changes do not occur each year as in the passenger car industry but running changes are constantly being made. A buyer whose company's truck production runs into the hundreds of thousands told me he purchases several parts that have not altered in the past eight years. The suppliers of these parts, however, change from time to time because each year new sources are investigated to make sure that costs remain competitive.

Purchasing personnel in the truck industry agree that there is a chronic shortage of parts and components. The situation has eased in the past few months, but this is probably only temporary. Stepped-up military requirements are likely to absorb unused capacity which would otherwise be employed in the production of components for civilian vehicles.

Although a number of the larger manufacturers produce major components in captive plants, the independent manufacturer can still sell them his product if it is comparable

in quality and competitive in price. The smaller truck producers rely exclusively on outside suppliers. All of them alike insist on regular calls by their suppliers' sales and engineering representatives. Fortunately, most of the U.S. truck industry is within easy driving or flying distance of Canadian plants.

Correspondence Not Enough

Canadian parts makers selling to truck manufacturing subsidiaries in Canada should call on buyers at the head office of the U.S. parent organization. Buyers at subsidiaries refer sources to the parent but recommendations are likely to be filed away unless the supplier himself makes a personal approach. "A vendor has to demonstrate to us that he is really keen on selling to our company. No amount of correspondence will convince us of his desire to quote competitively or meet delivery dates. He has to see us and sell us," the director of purchasing at a parent company told me. A Canadian firm that has supplied a subsidiary has the advantage of knowing something of the workings of the organization and it can point to its competence and reliability in dealing with orders for the Canadian plant. Hundreds of local vendors call on buyers at automotive and truck manufacturers each week. The Canadian salesman must make a personal visit too.

A list of the chief purchasing agents of major U.S. truck makers accompanies this article. Chevrolet and International Harvester have decentralized purchasing and their buying personnel are to be found at most assembly plants.

Canadian Trade Commissioners in Detroit and other U.S. cities will be pleased to help Canadian exporters meet the right buyers at plants in the territories covered by their office. ●

TABLE II—MAJOR U.S. TRUCK MANUFACTURERS

Brockway Motor Trucks
Division of Mack Trucks Inc.
106 Central Avenue
Cortland, New York 13045

George S. Hughes
Purchasing Agent

Chevrolet Motor Division
General Motors Corporation
General Motors Building
Detroit, Michigan 48202

Elmer F. Gormsen
Director of Purchasing

The bigger trucks of the Chevrolet line are produced in Pontiac (Michigan). Light heavies and light trucks are turned out in Flint (Michigan), St. Louis (Missouri), Atlanta (Georgia), Janesville (Wisconsin), Fremont (California), and Tarrytown (New York).

Diamond-Reo Truck Division
White Motor Corporation
1331 S. Washington Avenue
Lansing, Michigan 48920

F. W. Barton
Purchasing Agent

Dodge Truck Operations
Chrysler Corporation
Warren Truck Assembly Plant
Mound and Eight Mile Roads
Warren, Michigan

R. J. Jones
Purchasing Manager

Dodge has assembly points at Warren and St. Louis.

FWD Corporation
Clintonville, Wisconsin 54929

Lloyd J. Pinkowsky
Purchasing Director

Ford Motor Company
Ford Division
17101 Rotunda Drive
Dearborn, Michigan 48121

J. P. Bergmoser
General Purchasing Agent

Ford assembles light and medium trucks in Wayne (Michigan) and light trucks in Dallas (Texas), Kansas City, Lorain (Ohio), Mahwah (New Jersey), San Jose (California), Minneapolis (Minnesota), and Norfolk (Virginia). Heavies are made in Louisville (Kentucky).

Freightliner Corporation
5400 N. Basin Avenue
Portland, Oregon

Freightliner has plants at Portland and Pomona (California).

GMC Truck and Coach Division
660 South Boulevard East
Pontiac, Michigan 48053

W. W. Edward
Chief Purchasing Agent

Plants at Pontiac (Michigan) and Fremont (California).

International Harvester Company
401 N. Michigan Avenue
Chicago, Illinois 60611

B. B. Curtis
Director of Purchasing

International's heavies are produced at Fort Wayne (Indiana) and San Leandro (California). Medium and light units are assembled at Fort Wayne and Springhill (Ohio). Parcel delivery vans are manufactured at Bridgeport (Connecticut).

Kaiser Jeep Corporation
940 North Cove Blvd.
Toledo, Ohio 43601

L. S. MacKay
Vice President—Purchasing

Commercial vehicles are assembled in Toledo (Ohio); military vehicles in South Bend (Indiana).

Kenworth Motor Truck Company
8801 E. Marginal Way S.
Seattle, Washington 98124

E. S. Buringrud
Director of Purchasing

Plants situated at Seattle and Kansas City (Missouri).
KW Dart Units are the specialty of Kenworth's Kansas City operation.

Mack Trucks, Inc.
Allentown, Pennsylvania 18105

M. Zarella
Director of Purchasing

Plants at Allentown (Pennsylvania) and Hayward (California).

Oshkosh Motor Truck Inc.
2300 Oregon Street
Oshkosh, Wisconsin 54901

L. R. Jarvey
Purchasing Agent

Pacific Car and Foundry
1400 Fourth Avenue
Renton, Washington

David R. Platt
Director of Purchasing

Peterbilt trucks are also produced at Newark (California).

Walter Motor Truck Co.
School Road
Voorheesville, New York 12186

Joseph Hagerty
Director of Purchasing

White Trucks
Division of White Motor Corporation
842 East 79th Street
Cleveland, Ohio 44101

G. Farrance
Director of Purchasing

White Auto Car Division at Exton (Pennsylvania).

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Don't Neglect the Aftermarket

Multiply the bills you pay for maintenance and repairs to your car by ninety million and you'll have an idea of the size of the U.S. aftermarket. Competition is keen and these parts do not enter duty-free, so tariffs are a factor—but there is still room for more sales.

R. J. ARCHAMBAULT, *Vice Consul and Assistant Trade Commissioner, Detroit.*

THE automotive aftermarket thrives in good times and in bad. Prosperity brings more vehicles onto the roads; recession makes people anxious to keep old cars going. Annual sales in the United States aftermarket are running at about $10 billion, over $100 each year for every car and truck in the country.

The number of vehicles in the United States has been steadily increasing, rising from 66.6 million in 1957 to 92.4 million last year. To this figure some 1.5 million government-owned vehicles should be added. The aftermarket is closely related to the number of vehicles on the road. New cars as well as old ones need regular servicing. The older the car, the more service it needs. Since 55 to 60 per cent of the vehicles on U.S. roads are between three and eight years old, there are 50 million vehicles which need steady care. The accompanying table shows the parts most frequently replaced in order of value: mufflers and pipes, ignition parts, and spark plugs ranked one, two, and three respectively in 1965 and were also at the head of the list in the two previous years.

The exact sales value of service parts is difficult to pin-point because the aftermarket includes both replacement parts and accessories. Sales in 1966 have been estimated at different points in the $8 to $12 billion range. It is sufficient to remember that they are near the $10 billion mark and increasing every year.

Complicated Distribution Pattern

What baffles outsiders—and probably some insiders too—is how the auto parts reach the consumer. The old system of manufacturers to warehouse distributors to jobbers to garages, service stations or repair shops has given way to a more complex one. Since World War II the tire, battery and accessory (TBA) outlets, automotive chain stores, home and auto supply stores, department and discount stores have taken their place in the aftermarket, upsetting the traditional distribution pattern.

There are four main channels through which auto part manufacturers sell their wares:

1. The car and truck dealer channel.
2. The jobber and wholesaler channel.
3. The oil and tire company channel.
4. The chain, department and retail store channel.

The parts manufacturer may use one or more than one of these channels at the same time.

The aftermarket distribution system appears to be quite loosely coordinated. Within this system, however, some warehouse owners have formed organizations capable of offering to their jobbers, and con-

TABLE I

U.S. VEHICLE REGISTRATIONS
(passenger cars, trucks and buses)

Year	Vehicles Registered
1957	66,642,780
1958	67,862,942
1959	70,737,975
1960	72,976,026
1961	75,324,615
1962	78,568,983
1963	81,948,111
1964	85,062,568
1965	89,035,284
1966	92,409,000

TABLE II

U.S. AUTOMOTIVE WHOLESALERS' TWENTY TOP SELLING LINES

Product	1965 Sales (U.S.$million)
Mufflers, pipes, etc.	513
Ignition parts (including generators and armatures)	494
Spark plugs	453
Repair equipment	408
Batteries	387
Filters and cartridges (all types	369
Paint and body supplies	344
Motor and chassis parts	319
Rebuilt units	257
Fan belts, radiator and heater hose	253
Brake lining and lined shoes	226
Chemicals	184
Gaskets and oil seals	179
Shock absorbers	166
Bearings (motor)	165
Piston rings	150
Fuel pumps and parts	134
Brake parts and fluid	124
Bearings (anti-friction)	121
Lamp bulbs, flashers and sealed beams	115

sequently to retail outlets, certain uniform parts and service. Among these organizations is NAPA (National Automotive Parts Association). Back in 1962, NAPA had 22 members with 45 warehouses throughout the United States, each with inventory of over $1 million. Some NAPA lines are manufactured by well-known companies exclusively for NAPA members; most lines carry association brand names. Because of its success, NAPA now has emulators. It is expected that more and more companies will copy the NAPA system and try to build a nation-wide distribution organization.

Jobbers Play Important Role

The most important man in the aftermarket distribution system is still the jobber, also known as the automotive wholesaler. He is the main link between the factory warehouses, warehouse distributors and redistributors on one side, and the service stations, repair shops and truck and car dealers (who make roughly 55 per cent of all parts sales) on the other. The jobber is very brand conscious and brand acceptance is as important to the jobber as product availability is to service and repair establishments.

The role of the jobber is recognized by warehousing associations such as NAPA which offer jobbers the assistance they need to become top jobbers in their areas as well as protecting them against inventory obsolescence by taking back outdated items.

Stores Want Quick Turnover

The chain and the department stores have added a new dimension to the aftermarket distribution pattern. Because they prefer not to carry a large selection (which would mean holding an extensive stock for repeat orders) they buy from manufacturers only fast selling items such as those in the TBA field. They are strictly sales-oriented, buying what the customer wants and has to buy regularly.

They do not have the same penetration of the aftermarket as do warehouse distributors, but they don't need it. Large chain stores such as Montgomery Ward and Sears Roebuck and department stores such as Macy's and Bamberger prefer to develop private brands with their suppliers and to present to their customers, on an exclusive basis, a few selected nationally advertised brands. The same franchise policy has been adopted by specialty repair establishments such as the Midas muffler chain.

Discount houses are taking away from the service stations more and more automotive items. Anti-freeze is perhaps the best example of this trend.

Automakers Share Increasing

Some believe that independent suppliers will gradually disappear to make room for Ford, GM and Chrysler, which are taking an increasing share of the business. In our opinion, this is not likely to happen. The large car companies cannot hope to cover all distribution channels and the whole range of aftermarket items. There will always be a place for independent suppliers who put the emphasis on servicing retail outlets on a more individual basis and who are on the alert for new markets.

To compete with the large U.S. parts manufacturers, the smaller manufacturer has to make a first-rate presentation. It may be easier for an association to do this than an individual. This is why 53 major Japanese manufacturers of auto parts and accessories formed the Japan Auto Parts Industries Association (JAPIA) and set up offices in Chicago. Canadian suppliers may also find that the group or association approach is the key to a bigger share of the U.S. aftermarket. ●

Manaus Free Trade Zone Established

BRAZIL has established the Free Trade Zone of Manaus as an area of free trade and special fiscal incentives to create an industrial, commercial, agricultural and stockbreeding centre in the interior of the Amazon region. The administration of installations and services will be the responsibility of the Manaus Free Zone Superintendency (SUFRAMA), an autonomous state agency.

Manaus is located on the Rio Negro, 12 miles above its junction with the Amazon. Some 900 miles (a four-day trip) from the mouth of the Amazon, the city's only communication with the outside world is by river or air because no roads radiate from it. It is the collecting point for produce of a vast area, including parts of Peru, Bolivia and Colombia.

Named after the principal tribe of Indians living on the Rio Negro at the time of its discovery, Manaus is the capital of the state of Amazonas, the largest in Brazil. Of the state's population of 614,000, about 154,000 live in Manaus, the only real port and commercial centre of the entire Upper Amazon region.

Most imports to this free trade zone will be exempt from import and finished product taxes when the goods are intended for internal consumption, processing of other products in the territory, the fishing and livestock industries, installation and operation of industries and services of any type, and warehousing of stocks for re-export or sale or use elsewhere in Brazil.

However, imports of arms and ammunition, perfume, tobacco, alcoholic beverages and automobiles are excluded from this exemption and those of liquid and gas fuels and lubricants, petroleum derivatives and wheat in bulk are still regulated by specific legislation.

Exports will likewise be exempt from taxes. Goods produced, processed or finished in the Free Zone to be sent to other parts of Brazil will only be subject to the payment of a circulation of merchandise tax and a tax on the imported raw materials or component parts in the products.

The Manaus Free Trade Zone should provide opportunities for Canadian exporters to enter Brazil without the customary tariff barriers and possibly compete with the large manufacturers in the São Paulo area. The port is now served by the Booth Line, and the new Brazilian-American-Canadian freight conference will be operating in the Amazon area. For further information contact the Commercial Counsellor, Commercial Division, Canadian Embassy, Rio de Janeiro.

— R. G. SANDOR,
Assistant Commercial Secretary,
Rio de Janeiro.

The Kennedy Round: an important start

Have the Kennedy Round negotiations put new world market opportunities within fingertip reach of Canada's business community?

Federal Trade Minister Robert Winters is confident they have and Ontario's Minister of Economics and Development, Stanley Randall, joins him in a demonstration of Canada's global outlook.

A corridor conference in Winnipeg—from left, Sidney Spivak, Minister of Industry and Commerce for Manitoba, Mr. Winters, and A. R. Patrick, Minister of Industry and Development, Alberta.

Seen at the Winnipeg seminar are, left to right, Hugh Campbell, Secretary Treasurer, Prairie Animal Breeding Enterprises Ltd.; L. G. Jorgenson, Secretary Manager, Alberta Potato Commission, Edmonton; M. Schwarzmann, Assistant Deputy Minister (Trade Policy), Department of Trade and Commerce; and E. F. Wagner, President Calgary House Builders Association and President of Gienow Sash and Door Co. Ltd.

THE DEPARTMENT OF TRADE AND COMMERCE, working closely with provincial trade departments all across Canada, organized five Kennedy Round Trade Opportunities Seminars during September and October to help promote an understanding of the negotiations and their implications for Canadian businessmen.

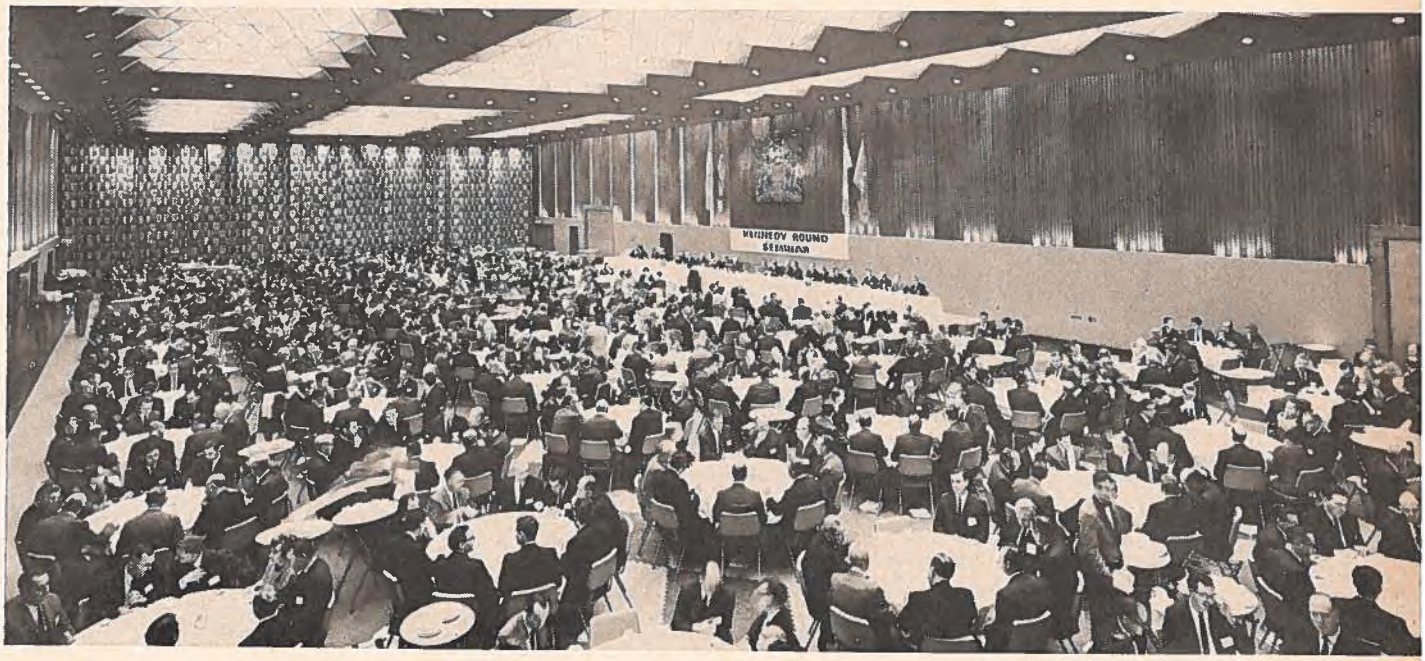
Beginning in Winnipeg and carrying through Halifax, Montreal, Toronto and Vancouver, the one-day seminars attracted almost 3,000 businessmen anxious to study the new international trading opportunities created by the Kennedy Round. They listened to panel discussions by government trade experts at both federal and provincial levels and heard businessmen describe expected effects of the negotiations on their particular industries. They asked questions about specific problems, met individually with experts on particular commodities, and were generally advised where the tariff reductions made the greatest impact and opened the broadest new selling opportunities.

Although trade officials readily admitted the one-day seminars could not hope to give businessmen a full grasp of the Kennedy Round results, they were confident the sessions had been extremely useful.

It was, as Trade Minister Winters told the 1,200 Toronto participants, an important start.

A Maritimer makes a point during the Trade Seminar in Halifax. Listening to C. A. Miller, Minister of Industry and Natural Resources for Prince Edward Island, are (left to right) J. A. Paterson, Deputy Minister, New Brunswick Department of Industry; the Minister of Trade and Commerce; and A. E. Calkin, General Manager, Scotian Gold Co-op Ltd., Kentville, Nova Scotia.

Businessmen as far as the eye can see—1,200 of them who attended the Toronto Seminar photographed during the luncheon. The response to the Federal Government's invitation to talk about the Kennedy Round was equally enthusiastic in the other four cities.



Enterprising Exporters in the Maritimes

Industrial Shipping's U.S. agent takes two potential customers for a demonstration sail off Long Island Sound, N.Y. This is the company's 24-foot fibreglass Westwind, introduced in '67.

"Paceships" Pull Ahead

TED LANE, general sales manager of Industrial Shipping Co. Ltd., believes like most sailing fans that "there's nothing—absolutely nothing—half so much worth doing as simply messing about in boats . . . or with boats." About 18 months ago he gave up a marketing career in the pharmaceutical industry to go to the Mahone Bay, Nova Scotia, yacht-builders to help reshape their marketing policy and step up sales.

Industrial Shipping was established just after the war to turn out plywood motorboat hulls. In ensuing years it broadened its scope but it also encountered heavy weather and almost foundered. Two years ago it was purchased by Atlantic Bridge which owns a number of other N.S. companies. Today it has on the market some 14 fibreglas models in its *Paceship* line ("Set the pace in a *Paceship*") including 40- and 32-footers, daysailers, sailing dinghies and yacht tenders. Most of them have been designed by leading U.S. designers who know what sailing buffs want. There is also a commercial division which can build commercial craft of up to 200 feet over-all.

Ted Lane's job has been to streamline sales policy, especially for the United States market, to which three-quarters of the boats built at Mahone Bay go. He has adopted the "hard sell", backed up by sound market research, good after-sales service, and aggressive advertising. The company's practice is to sell to American dealers outright and to select first class dealers with the physical premises to display the craft properly. And Industrial Shipping is succeeding in this tough market because, as Lane puts it, it offers the right product, more than competitive in price, with a good warranty that the firm stands behind.

Participating in the big boating shows at Chicago and New York brought him into contact with some of these dealers and also helped expose the *Paceships* to thousands of prospective buyers who could compare them with what U.S. builders offered. Dealers with whom the company makes agreements have the right to exclusive distribution in a designated area, perhaps a whole state or a part of one. The company quotes them duty-paid delivered prices in U.S. dollars and sells all its boats cash on delivery. (Deliveries are usually made by Industrial Shipping's own trucks; lately two or three truckloads have been going forward to the U.S. each week.) Dealers must provide service, though the company will pay the repair bills for all warranty work.

At the moment the sales manager rates about 60 per cent of his U.S. dealers as tops; the other 40 per cent could be improved. The firm supports all of them by advertising in national yachting publications and by providing allowances for local advertising.

The waterways are never static and neither is the boat-building business; new models must be offered each year to keep new customers coming and old ones "trading up". Premium boat of the line just now is the 25-foot *East Wind,* with an 8 h.p. inboard motor installed as per U.S. Coastguard standards. Introduced this year was the *West Wind,* designed by Ted Hood, which sleeps four. The bread and butter of the business are the *Daysailers*—14, 16 or 19 feet over-all. The company can build these at the rate of one a day.

Industrial Shipping executives feel that the craft they turn out are—in typically Canadian fashion—halfway between U.S. and British designs, with the best features of both. Built in a province where shipbuilding is a craft with a proud history, the *Paceships* are making real headway. Some 85 per cent of production goes to customers abroad and sales are rising about 30 per cent a year. With the biggest boat plant in Canada and a growing reputation across the border, the weather seems to be set fair for this enterprising exporter. ●

When Japan Celebrates

MANY Japanese households celebrating the New Year today include in their menu for the festival herring roe from Canada. Used in the same way as caviar, it comes from Belliveau's Cove, on the Fundy shore of Nova Scotia. The roe is ripe for only five to six weeks each year and Belliveau Fisheries has to process it during that time. Its venture into the Japanese market came about because of an inquiry originating in California that was passed on by a food broker in New York. Hard on the heels of the inquiry came a representative of a big Japanese fish firm who was stationed in Alaska. He interviewed Mr. Belliveau about the possibility of supplying the roe and also discussed how it should be processed to meet the specifications of the Japanese buyer. That was in 1963 and the order has been renewed each year since. And each year an agent of the firm appears to negotiate the sale and to assist with the processing. ●

Opportunity in Boston

SEIZING an opportunity when it presents itself has worked out well for a Halifax organization, the Grimsby Group. Its main business is supplying the fisheries industry with gas and diesel engines and with machine-made synthetic nets for which it imported the net-making machinery. But it is also anxious to diversify. Last year the company heard, through the Halifax Regional Office of Trade and Commerce, that a Boston firm was looking for a hand-printing press to be made to specifications. One of Grimsby's executives phoned Boston and was told, "If you want to do any business, get on the next plane." He did, and returned several days later with the drawings and specifications—and the order. ●

For Fish Handlers

"WE are great letter-writers," says one of the executives of Hillis and Co., also of Halifax, makers of fish-handling equipment—fish washing tanks, dumping fish carts, trawl gallows, hook-up blocks, hatch covers, and many other things. The Boston office of the Trade Commissioner Service provided the company's Mr. Matheson with a list of firms engaged in the fisheries business in New England. Hillis then sent out carefully planned sales letters to them, describing the Hillis equipment and enclosing brochures and duty-paid delivered prices. The result: telephone calls and inquiries by letter about the products from Gloucester, Bedford, and other fishing ports.

Because this is specialized equipment, Hillis and Co. does not consider it worthwhile to employ agents in the New England market. Instead, a member of the firm goes down regularly and spends a week there, calling on customers and prospects. Because Hillis and Co. provides a complete design and engineering service for fish handling on trawlers, etc., it has teamed up with an engineering firm; sometimes one of the engineers accompanies the Hillis representative. Patient education of the potential client, plus persistence, is winning product acceptance and sales, says Mr. Matheson. ●

Horseshoes for High-Steppers

IS THE HORSE disappearing in Canada and the United States? No, says W. A. Rix, president of Charlottetown Metal Products in Prince Edward Island. In fact, there are over 70,000 high-stepping horses—mostly riding and racehorses—in the Los Angeles area alone. And Mr. Rix knows what he's talking about because his firm is Canada's only manufacturer of horseshoes and has found a lucrative market for them in the United States.

This business is ten years old. In 1963 the Charlottetown firm bought its horseshoe business and equipment from the Steel Company of Canada and in 1966 purchased more equipment from a U.S. horseshoe manufacturer in Joliet, Illinois, who also went out of business.

From the Steel Company of Canada, the Island firm also acquired a few customers in Maine and Vermont. To make further contacts, Mr. Rix went to New York and

W. A. Rix (left) president of Charlottetown Metal Products in Prince Edward Island, discusses export prospects for horseshoes during Operation Export 1967 with A. W. Evans, then Canadian Consul and Trade Commissioner in Cleveland.

talked with a horseshoe distributor who later took on the line. He also interested a firm importing steel products into the Los Angeles area. Eventually he divided the U.S. into sales districts and appointed agents or distributors not only in New York and Los Angeles but also in Houston, Texas, and other U.S. cities to which he could ship by water.

Remember the old adage "For want of a shoe, the horse was lost"? This Canadian company knows that lost or damaged shoes have to be replaced quickly. To provide proper service, it moves supplies into each market area and warehouses them. Its agents then sell from inventory, bill the customer, and collect the money. Stiffest competition comes from Japan and from the one remaining U.S. producer in Albert Lea, Wisconsin.

Surprisingly enough, there are styles in horseshoes as there are in shoes for humans. The designs differ from area to area and also with the job the horse does—a workhorse needs a different type from a hunter or a racehorse. Today Charlottetown Metal Products turns out fronts and hinds in nine sizes in the Saddle pattern, plus heavier working shoes and the so-called Snow pattern. Keeping up with shifts in design and in demand has become the main problem in this business, says Mr. Rix. But sales are rising; last year exports accounted for one third of the horseshoe business and soon it will be two thirds. The firm is now investigating markets in Central America and the West Indies.

There are still plenty of horses but hardly enough to make shoeing them the company's sole business. It also turns out corrugated metal pipe, guard railings, roofing, replacement blades for heavy equipment such as graders and snowplows, and other steel products. But it has found in horseshoes a profitable and unusual sideline. ●

businessman's bookshelf

The Middle East and North Africa 1967-68

Europa Publications Limited. 984 pages. $21.00.

EVENTS MOVE FAST in the Middle East and North Africa and the businessman who tries to economize by using old reference books is asking for trouble. Europa's latest yearbook carries the story as far as August 1967, three months after the war between Israel and the Arab countries.

Part I deals with developments in the area as a whole. There are chapters on inter-Arab relations and the war with Israel; an outline of the physical and social geography of the Middle East; the holy places and the tenets of Islam; the four principal local calendars (Muslin, Iranian, Ethiopian and Hebrew); oil in the Middle East and North Africa (with details of the ownership of the various companies and the capacities of oil and natural gas pipelines), and the Suez Canal. There is also an interesting page and a half on local weights and measures. We learn, for example, that a dunum in Jordan and Israel is 1,000 square metres, in Syria and Turkey 919, and in Iraq 2,500.

Facts, figures and the addresses of organizations of a politico-economic kind complete the first part; these are CENTO, EEC and the various UN agencies with offshoots in the area, as well as the Arab League and the Mahgreb Permanent Consultative Committee.

Part II describes the history, politics and economic progress of each country in considerable detail. Those studied in this volume are: Aden, Algeria, Chad, Cyprus, Ethiopia, Iran, Iraq, Israel, Jordan, Kuwait, Lebanon, Libya, Mali, Mauritania, Morocco, Muscat and Oman, Niger, the Persian Gulf States, Saudi Arabia, Somalia, French Somaliland, Spanish North Africa, Sudan, Syria, Tunisia, Turkey, the United Arab Republic, and Yemen. (The publishers produce yearbooks on other parts of the world which take in the countries bordering on the region.)

Part III consists of a 110-page "Who's Who in the Middle East and North Africa", a bibliography, and a list of research institutes studying different aspects of the region. The list does not include African Affairs Departments, Schools of Islamic Studies, and other parts of the normal teaching organization of the major universities; unless the subject is very abstruse, it is worth looking around nearer home first, at McGill or Windsor, for example.

The Canadian businessman who wants a good general picture of the market before he sets off on a trip or entertains a visitor from the area will find *The Middle East and North Africa 1967-68* most helpful. The text is well written and the facts presented in a clear and orderly way.

Order from: Europa Publications Limited, 18 Bedford Square, London, W.C.1, England.

British Commonwealth and International Trade Index 1966-67

Business Dictionaries Limited. 888 pages. $8.00.

HEAVILY WEIGHTED towards British industry, this index devotes 452 pages to Britain compared with only 15 for Canada and 17 for the United States. Some articles deal with specific services for the British exporter which are of little interest to Canadians.

The first part lists British manufacturers alphabetically, then by trade classification. We liked the summary of trade classifications which speeds up the search for an elusive item. The section on trademarks and brands is not by any means exhaustive and might be of little use to Canadians trying to discover who their competitors are. The second part deals with Commonwealth countries and is rather sketchy.

The index will appeal mainly to exporters selling to industry in Britain or looking for suppliers there.

Order from: R. V. Gillman, P.O. Box 439, Westmount, Quebec.

Philippine Directory 1965-66

Economic Development Foundation Inc. Volume I, 167 pages. $9.00.

THE FIRST VOLUME of this Directory deals with the cement, ceramics, mining, petroleum, plywood and veneer, paper and paper products, and sugar industries in the Philippines, and with banks and insurance companies there. The second, which is to be published next spring, will cover the drug, chemical, food, glass, iron and steel, leather, logging, lumber and wood products, plastics, rubber, textile and tobacco industries.

The product index is a quick means of finding out who makes a particular item. The industry section provides information on the officers of the various firms, capital structure, number of employees, products and rated capacity. The banking section gives only the names of the officers but the insurance section lists income, disbursements, admitted assets, liabilities, paid-up capital, surplus and net worth. Unfortunately, however conscientiously the authors may have compiled this information, the lapse of time has inevitably reduced its usefulness.

Businessmen will find the statistical section interesting although import, export and local production figures do not go beyond 1964. Yet the Directory does give a feel of the market and is a starting point for further research.

Order from: ICAP Corporation, 375 Park Avenue, New York, N.Y. 10022.

World Weights and Measures

UN Department of Economic and Social Affairs. 138 pages. U.S.$2.50.

THE CASUAL book browser might put down hastily this statistical handbook with its complex lists and tables. After all, the introduction states that it is primarily intended for statisticians working in the field of international economics. Closer inspection, however, reveals a wealth of concise and valuable data for expert and layman alike, including details on conversion factors and handy information on national currencies and weights and measures.

The handbook was first published in 1955 but the systems of weights and measures in use in a number of countries have changed substantially, necessitating this revised edition. A number of countries have recently "gone metric", including India, South Korea, Nigeria and Saudi Arabia. In May 1965 the British Government announced the gradual introduction of the metric system over a 10-year transition period.

The book itself is divided into five sections: introduction; international systems and units of weights and measures; national systems and units of weight, measure and currency; index of weights and measures, and index of currencies. Although the second section, which covers conversion factors, is probably most valuable for the true statistician, the final three sections dealing with individual countries are of more general interest and use to those engaged in international trade.

Order from: Sales Section, United Nations, New York or Geneva.

Trade Policy toward Low-Income Countries

Committee for Economic Development. 44 pages. $1.00.

THE FOREWORD of this publication notes that "the GATT communique of May 1967 concluding the Kennedy Round of tariff negotiations suggested that the next order of business should be to liberalize the policies of high-income countries with respect to their trade with low-income countries." The recommendations of the Committee for Economic Development (CED), a U.S. organization, on how this liberalization could be achieved are contained in this Statement on National Policy prepared by the CED's Research and Policy Committee, in association with its counterpart organizations in Britain, France, West Germany, Italy, Japan and Sweden.

The joint proposals contained in this policy statement stress that the economic progress of the low-income countries will require a more rapid expansion of their trade with high-income countries than has

recently been achieved. However, the report argues that the industrialized countries can only play a supporting role in furthering the growth of these developing nations.

The Committee believes the two greatest trade problems facing the low-income countries are, first, that the growth in their export earnings in the past decade has been slow in relation to the need for imports to support reasonable development programs, and second, that their exports are frequently subject to sharp fluctuations in prices and earnings.

To help overcome these problems, the statement recommends that the high-income countries advance a comprehensive program to help speed the economic growth of the low-income nations. This would be coordinated in the Organization for Economic Co-operation and Development. The CED's major recommendations for such a program include the reduction of trade barriers, adjustment assistance, postponement of reciprocity, preferences, regional groups, commodity agreements and compensatory finance.

The publication itself makes for easy reading since it is both brief and to the point. It concludes with a useful statistical appendix, including information on the exports of less-developed nations and outlines on the history, functions and membership of major international organizations.

Order from: Committee for Economic Development, Distribution Division, 711 Fifth Avenue, New York, N.Y. 10022.

Foreign Trade Directory of Taiwan

Importers & Exporters Association of Taipei. 885 pages. Free.

PUBLISHED IN TAIPEI, Taiwan, this directory is divided into six sections. Some of these outline the history of foreign exchange and trade controls and regulations, list all organizations concerned with foreign trade at all levels, and give useful facts such as conversion equivalents, postal and telegraph rates, and exchange rates of foreign countries. Still another lists products according to the Standard Classification of Commodities of the Republic of China (CCC), and, alphabetically, the names and addresses of members of the Importers and Exporters Association of Taipei.

Exporters interested in the Republic of China should find this book useful.

Order from: Importers & Exporters Association of Taipei, P.O. Box 598, Taiwan.

Trade Commissioners on Tour

In Territory

Bermuda—J. D. Welsh, Vice Consul and Assistant Trade Commissioner in New York, will visit Bermuda November 19-December 3.

Brazil—R. G. Sandor, Assistant Commercial Secretary in Rio de Janeiro, will visit Manaus, Belem and Recife December 6-16.

French West Indies—K. G. Ramsay, Commercial Counsellor in Port-of-Spain, Trinidad, will visit Martinique and Guadeloupe January 7-13.

Guyana—J. D. Tennant, Assistant Commercial Secretary in Port-of-Spain, will visit Georgetown December 17-23.

Indonesia—J. H. Bailey, Commercial Counsellor in Singapore, will visit Djakarta November 27-December 1.

Libya—P. A. Freyseng, Commercial Secretary, and C. D. Miller, Assistant Commercial Secretary, in Rome, Italy, will visit Tripoli and Benghazi January 15-24.

Taiwan—R. A. Fairweather, Vice Consul and Assistant Trade Commissioner in Manila, Philippines, will visit Taiwan December 3-17.

Thailand—D. H. M. Branion, Assistant Commercial Secretary in Singapore, will visite Bangkok December 11-15.

Turkey—An officer of the Canadian trade office in Athens, Greece, is expected to visit Ankara during the first week of December.

Windward Islands—J. A. Ahow, Commercial Officer in Port-of-Spain, Trinidad, will visit St. Lucia, St. Vincent and Grenada December 3-9.

Businessmen who would like the above to undertake assignments for them should write to the post as soon as possible.

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John M. Fraser, Trade Commissioner
R. G. Godson, Assistant Trade Commissioner
D. M. Collacott, Assistant Trade Commissioner
A. Blum, Assistant Trade Commissioner

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Telex: HKG 391 (DOMCAN HKG)
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INDIA

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K. G. DeWolf, Assistant Commercial Secretary

Cable: CANADIAN *Phone*: 61-8254
Telex: 346 (DOMCAN DLI)
Territory: Bhutan, Nepal, Sikkim.

IRAN

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Bezrouke Building
Corner of Takht Jamshid Avenue and Forsat Street
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Cable: CANTRACOM *Phone*: 613560,4-9291
Telex: 2037 (DOMCAN TEHRAN)

IRELAND

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66 Upper O'Connell Street
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D. M. Holton, Commercial Counsellor

Cable: CANADIAN *Phone*: 44251
Telex: 5488 (DOMCAN DUBLIN)

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Commercial Secretary
Canadian Embassy
P.O. Box 20140
84 Hahashmonaim Street
Tel Aviv, Israel

S. G. Harris, Commercial Secretary
M. A. Brault, Assistant Commercial Secretary

Cable: CANADIAN *Phone*: 37161/2
Telex: 740 (DOMCAN TV)
Territory: Cyprus.

ITALY

Commercial Counsellor
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J. H. Stone, Commercial Counsellor
P. A. Freyseng, Commercial Secretary
C. D. Miller, Assistant Commercial Secretary
D. T. Wismer, Assistant Commercial Secretary

Cable: CANADIAN *Phone*: 864-327
Telex: 61056 (DOMCAN ROME)
Territory: Provinces of Toscana, Marche, Umbria, Lazio, Abruzzi-Molise, Puglia, Campania, Basilicata, Calabria, Sicilia, Sardegna. Other countries: Libya, Malta.

(continued)

ITALY (continued)

Consul General and Trade Commissioner
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20124 Milan, Italy

R. W. Blake, Consul General and Trade Commissioner
C. E. Rufelds, Consul and Assistant Trade Commissioner
B. M. White, Vice Consul and Assistant Trade Commissioner

Cable: CANTRACOM *Phone*: 652-485/652-600
Telex: 31368 (CANTRCOM MILAN)
Territory: Provinces of Emilia-Romagna, Lombardia, Piedimonte, Trentino-Alto Adige, Veneto, Liguria, Trieste, Valle D'Aosta, Friuli-Venezia.

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R. G. Woolham, Commercial Secretary
D. I. Ditto, Assistant Commercial Secretary

Cable: CANADIAN *Phone*: 65726
Telex: KGN 30 (BEAVER KINGSTON)
Territory: Bahamas, British Honduras, Cayman Islands, Turks and Caicos Islands.

JAPAN

Minister (Commercial)
Embassy of Canada
Akasaka Post Office
Tokyo, Japan

J. A. Stiles, Minister (Commercial)
W. G. Brett, Commercial Counsellor
R. A. Food, Assistant Commercial Secretary
L. R. Wilson, Assistant Commercial Secretary
G. M. Wansborough, Assistant Commercial Secretary

Cable: CANADIAN *Phone*: 408-2101/8
Telex: TK 2218 (DOMCAN TK 2218)
Territory: Korea, Okinawa.

KENYA

Commercial Secretary
Office of the High Commissioner for Canada
P.O. Box 3778
Industrial Promotion Services Building
Kimathi Street
Nairobi, Kenya

J. B. McLaren, Commercial Secretary
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Telex: 20198 (DOMCAN)
Territory: Malawi, Tanzania, Uganda, Zambia.

LEBANON

Commercial Counsellor
Canadian Embassy
Boîte Postale 2300
Alpha Building
Rue Clemenceau
Beirut, Lebanon

N. W. Boyd, Commercial Counsellor
R. H. M. Cathcart, Assistant Commercial Secretary
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Cable: CANADIAN *Phone*: 250955
Telex: 652 (DOMCAN BERYT)
Territory: Aden, Iraq, Jordan, Persian Gulf area, Saudi Arabia, Syria, Trucial States, Yemen.

MALAYSIA

Commercial Counsellor
Office of the High Commissioner for Canada
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A.I.A. Building, Ampang Road
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P. Stuchen, Commercial Counsellor

Cable: DOMCAN *Phone*: 89722/4
Telex: KL/TX279 (DOMCAN KL)
Territory: Brunei, Burma.

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R. A. Kilpatrick, Assistant Commercial Secretary
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R. H. Gayner, Commercial Secretary
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Telex: 065-3505 (DOMCAN NZ 3505)
Territory: Cook Islands, Fiji, French Oceania, Gilbert and Ellice Islands, Tahiti, Tonga, Western Samoa.

NIGERIA

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Telex: 275 (DOMCAN LAGOS)
Territory: Dahomey, Gambia, Niger, Senegal, Sierra Leone.

NORWAY

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Fridtjof Nansens plass 5
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D. B. Browne, Acting Commercial Secretary

Cable: CANADIAN *Phone*: 33-30-80
Telex: Oslo 1880 (DOMCAN OSLO)
Territory: Iceland.

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Office of the High Commissioner for Canada
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Cable: DOMCAN RAWALPINDI
Telex: LH 15 (LH 15 LAHORE 15)
Territory: Afghanistan.

PERU

Commercial Secretary
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Edificio El Pacifico
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E. E. Price, Commercial Secretary
A. T. Eyton, Assistant Commercial Secretary

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Telex: WLA 5323 (DOMCAN LIMA)
Territory: Bolivia.

PHILIPPINES

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1414 Roxas Boulevard
Manila, Philippines

J. L. Mutter, Consul General and Trade Commissioner
E. L. Bobinski, Consul and Assistant Trade Commissioner
R. A. Fairweather, Vice Consul and Assistant Trade Commissioner

Cable: CANADIAN *Phone*: 5-85-97, 5-86-15
Telex: 3252 (DOMCAN MN 3252)
Territory: Republic of China (Taiwan).

PORTUGAL

Commercial Counsellor
Canadian Embassy
Rua Marques de Fronteira, No. 8—4° D°
Lisbon, Portugal

B. A. Macdonald, Commercial Counsellor
J. R. Brocklebank, Assistant Commercial Secretary

Cable: CANADIAN *Phone*: 55-31-18
Telex: 377 (DOMCAN P)
Territory: Azores, Cape Verde Islands, Madeira, Portuguese Guinea.

SINGAPORE

Commercial Counsellor
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P.O. Box 845
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360 Orchard Road
Singapore 1, Singapore

J. H. Bailey, Commercial Counsellor
D. H. M. Branion, Assistant Commercial Secretary

Cable: CANADIAN *Phone*: 36-1322
Telex: 277 (DOMCAN SPORE)
Territory: Indonesia, Thailand.

SOUTH AFRICA

Canadian Government Trade Commissioner
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Mobil House, 17th Floor
Corner Rissik and De Villiers Streets
Johannesburg, South Africa

Wm. Jones, Canadian Government Trade Commissioner
R. W. Burchill, Assistant Trade Commissioner
A. C. W. Davis, Assistant Trade Commissioner

Cable: CANADIAN *Phone*: 834-6521
Telex: 7189 (DOMCAN J 7189)
Territory: States of Natal, Orange Free State, Transvaal.
Other countries: Angola, Botswana, Lesotho, Malagasy, Mauritius, Mozambique, Reunion.

(continued)

SOUTH AFRICA (continued)

Canadian Government Trade Commissioner
P.O. Box 683
African Life Centre, 13th Floor
St. George's Street
Cape Town, South Africa

H. W. Richardson, Trade Commissioner
D. H. Leavitt, Assistant Trade Commissioner

Cable: CANADIAN *Phone*: 2-5134/5
Telex: 7060 (5-7060 CT)
Territory: Cape Province. Other countries: St. Helena, South West Africa.

SPAIN

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Apartado 117
Edificio Espana
Avenida de Jose Antonio 88
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L. A. Campeau, Commercial Counsellor
F. M. Mulkern, Assistant Commercial Secretary

Cable: CANADIAN *Phone*: 247-54-00
Telex: 7347 (DOMCAN MADRID)
Territory: Balearic Islands, Canary Islands, Gibraltar, Rio Muni, Rio de Oro, Spanish Sahara.

SWEDEN

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D. S. Armstrong, Commercial Counsellor
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Telex: 10687 (DOMCAN STHLM)
Territory: Finland.

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Kirchenfeldstrasse 88
Berne, Switzerland

G. E. Blackstock, Commercial Secretary
D. T. Johnston, Assistant Commercial Secretary

Cable: CANADIAN *Phone*: 44-63-81
Telex: 32489 (DOMCAN BERNE)
Territory: Liechtenstein, Tunisia.

TRINIDAD AND TOBAGO

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K. G. Ramsay, Commercial Counsellor
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Cable: CANADIAN *Phone*: 34787
Telex: 31314 (POS 31314)
Territory: Barbados, French Guiana, Guadeloupe, Guyana, Leeward and Windward Islands, Martinique, Surinam.

UNION OF SOVIET SOCIALIST REPUBLICS

Commercial Counsellor
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23 Starokonyushenny Pereulok
Moscow, U.S.S.R.

W. J. Collett, Commercial Counsellor
R. F. Turcotte, Commercial Secretary

Cable: CANAD *Phone*: 415142
Telex: 945 (DOMCAN MSK)

UNITED ARAB REPUBLIC

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Kasr el Doubara Post Office
6 Sharia Rouston Pasha
Garden City
Cairo, Egypt

Cable: CANADIAN *Phone*: 23110
Territory: Ethiopia, Somali Republic, Sudan.

UNITED NATIONS

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New York, N.Y. 10017

R. D. Lucas, Second Secretary

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UNITED STATES

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S. G. Tregaskes, Commercial Counsellor
G. W. Green, Commercial Counsellor
W. F. Hillhouse, Commercial Counsellor (Agriculture)
H. C. Armstrong, Commercial Counsellor
Miss V. F. Wightman, Attaché (Agriculture)

Cable: CANADIAN *Phone*: DEcatur 2-1011 (Area Code 202)
Telex: 0089664 (DOMCAN WSH)
Territory: District of Columbia.

(continued)

Deputy Consul General (Commercial)
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New York City, N.Y. 10019

C. J. Van Tighem, Deputy Consul General (Commercial)
B. C. Steers, Consul and Trade Commissioner
S. B. McDowall, Consul and Assistant Trade Commissioner
J. D. Welsh, Vice Consul and Assistant Trade Commissioner
D. Keddie, Vice Consul and Assistant Trade Commissioner
C. K. Marchant, Vice Consul and Assistant Trade Commissioner

Cable: CANTRACOM *Phone*: JUdson 6-2400 (Area Code 212)
Night Line: JUdson 6-2321
Telex: 00126242 (DOMCAN NYK)
Territory: States of Connecticut, New Jersey (eleven northern counties), New York. Other countries: Bermuda.

Consul and Trade Commissioner
Canadian Consulate General
500 Boylston Street
Boston, Massachusetts 02116

R. C. Anderson, Consul and Trade Commissioner
C. A. Carruthers, Consul and Assistant Trade Commissioner
J. N. R. Ferland, Vice Consul and Assistant Trade Commissioner

Phone: 262-3760 (Area Code 617)
Telex: 0094567 (DOMCAN BSN)
Territory: States of Maine, Massachusetts, New Hampshire, Rhode Island, Vermont.

Consul and Senior Trade Commissioner
Canadian Consulate General
310 South Michigan Avenue, Suite 2000
Chicago, Illinois 60604

D. H. Cheney, Consul and Senior Trade Commissioner
J. A. Doyle, Consul and Trade Commissioner
P. D. Donohue, Consul and Assistant Trade Commissioner
L. G. Lee, Vice Consul and Assistant Trade Commissioner

Phone: 427-1031 (Area Code 312)
Telex: 00254171 (DOMCAN CGO)
Territory: States of Illinois, Indiana, Iowa, Kentucky, Minnesota, Missouri, Nebraska, North Dakota, South Dakota, Wisconsin.

Consul and Trade Commissioner
Canadian Consulate
Illuminating Building
55 Public Square
Cleveland, Ohio 44113

H. M. Maddick, Consul and Trade Commissioner
J. C. Bradford, Consul and Assistant Trade Commissioner

Phone: 861-1660 (Area Code 216)
Telex: 00985364 (DOMCAN CLV)
Territory: State of Ohio.

Consul and Trade Commissioner
Canadian Consulate
2100 Adolphus Tower
1412 Main Street
Dallas Texas 75202

C. M. Forsyth-Smith, Consul and Trade Commissioner
J. A. Langley, Vice-Consul and Assistant Trade Commissioner

Phone: 742-8031 (Area Code 214)
Territory: States of Texas, Arkansas, Kansas, New Mexico, Oklahoma.

(continued)

UNITED STATES (continued)

Consul and Trade Commissioner
Canadian Consulate
1920 First Federal Building
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Detroit, Michigan 48226

H. S. Hay, Consul and Trade Commissioner
V. G. Lotto, Consul and Assistant Trade Commissioner
R. J. P. Archambault, Vice Consul and Assistant Trade Commissioner

Phone: 965-2811 (Area Code 313)
Telex: 0023445 (DOMCAN DET)
Territory: State of Michigan.

Consul and Trade Commissioner
Canadian Consulate General
510 West Sixth Street
Los Angeles, California 90014

V. B. Chew, Consul and Trade Commissioner
J. H. Suggitt, Consul and Assistant Trade Commissioner
R. B. Blake, Vice Consul and Assistant Trade Commissioner

Phone: MAdison 2-2233 (Area Code 213)
Telex: 00674119 (DOMCAN LSA)
Territory: States of Arizona, California (ten southern counties), Clark County in Nevada

Consul and Trade Commissioner
Commercial Division
Canadian Consulate General
2110 International Trade Mart
2 Canal Street
New Orleans, Louisiana 70130

P. A. Savard, Consul and Trade Commissioner
R. E. Pedersen, Vice Consul and Assistant Trade Commissioner

Phone: JAckson 5-2136, 5-2137 (Area Code 504)
Telex: 0058237 (DOMCAN NLN)
Territory: States of Alabama, Florida, Georgia, Louisiana, Mississippi, North Carolina, South Carolina, Tennessee.

Consul and Trade Commissioner
Canadian Consulate
3 Penn Center Plaza
Philadelphia, Pennsylvania 19102

W. J. Millyard, Consul and Trade Commissioner
R. D. P. Lee, Vice Consul and Assistant Trade Commissioner
J. N. Grantham, Vice Consul and Assistant Trade Commissioner

Cable: CANADIAN *Phone:* LOcust 35838 (Area Code 215)
Telex: 00845266 (DOMCAN PHA)
Territory: States of Delaware, Maryland, New Jersey (nine southern counties), Pennsylvania, Virginia, West Virginia.

(continued)

UNITED STATES (continued)

Consul and Trade Commissioner
Commercial Division
Canadian Consulate General
111 Pine Street
San Francisco, California 94111

R. M. Dawson, Consul and Trade Commissioner
D. S. M. Baker, Vice Consul and Assistant Trade Commissioner

Phone: 433-2517 (Area Code 415)
Telex: 0034321 (DOMCAN SFO)
Territory: States of California (except the ten southern counties), Colorado, Hawaii, Nevada (except Clark County), Utah, Wyoming.

Consul General
Canadian Consulate General
1308 Tower Building
Seventh Avenue at Olive Way
Seattle, Washington 98101

Phone: MUtual 2-3515 (Area Code 206)
Telex: 0032462 (DOMCAN SEA)
Territory: States of Alaska, Idaho, Montana, Oregon, Washington.

URUGUAY

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Montevideo, Uruguay

Cable: CANADIAN *Phone*: 96096
Telex: 398078 (DOMCAN MVD)
Territory: Falkland Islands.

VENEZUELA

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Ciudad Comercial Tamanaco
Caracas, Venezuela

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J. E. Kepper, Assistant Commercial Secretary

Cable: CANADIAN *Phone*: 32.40.41/44
Telex: 877 (877 DOMCAN)
Territory: Netherlands Antilles.

YUGOSLAVIA

Commercial Secretary
Canadian Embassy
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Belgrade, Yugoslavia

Z. W. Burianyk, Commercial Secretary

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A point of contact

"A point of contact" with all the resources and services of the Department of Trade and Commerce—that is perhaps the best way to describe the seven Regional Offices set up by the Department across Canada. But this deceptively simple phrase embraces activities of many types and the maintaining of close liaison with business firms, trade associations and other groups, federal and provincial government officials, and individual exporters.

LET'S BEGIN with the company or individual businessman. Contact with the Regional Office is often the initial step for a firm considering the export market. A manufacturer in the Maritimes can get in touch with the office in Halifax or a firm in British Columbia with the one in Vancouver. And he can do this by simply dialing, toll-free, the number Zenith 0-1967. In fact, the businessman who calls this number anywhere in Canada will be put in touch with the nearest Regional Office. (After January 1, 1968, dial Zenith 0-1968.) At once, the Department goes to work for him. Trade Commissioners in many countries can be alerted to advise him on the potential for his product or help him select agents; the Office of Trade Relations in Ottawa can be consulted on tariffs and on the access to markets; other branches can also assist. And this counsel and support continue, if necessary, through all stages of the export operation.

Charged with facilitating the development of exports in their area, the Regional Officers do not wait for the exporter to come to them. They go out and look for products that can be sold abroad. They get in touch with industries and urge them to consider exporting. The Edmonton manager, for example, encouraged a group of manufacturers of shortline agricultural equipment to plan an export program; in Winnipeg the Regional Office arranged a conference on exports of airport equipment—a conference involving both the Manitoba Government and provincial companies in this field. Sometimes the encouragement of exporting takes the form of visits to individual plants, sometimes it means speaking to Chambers of Commerce or other associations, and sometimes it calls for taking part in conferences of various types.

The Regional Office also serves as a point of contact between the federal Department of Trade and Commerce and the provincial departments charged with the development of trade and industry. In all their activities, the Regional Officers co-operate closely with provincial authorities. Frequently they work together on projects, such

For many businessmen, the first step towards exporting is paying a visit to the nearest Regional Office and seeking advice. Here a British Columbia businessman prepares to discuss his export interest with J. E. Murray (centre) and Miss Molly Cashell of the Vancouver office.

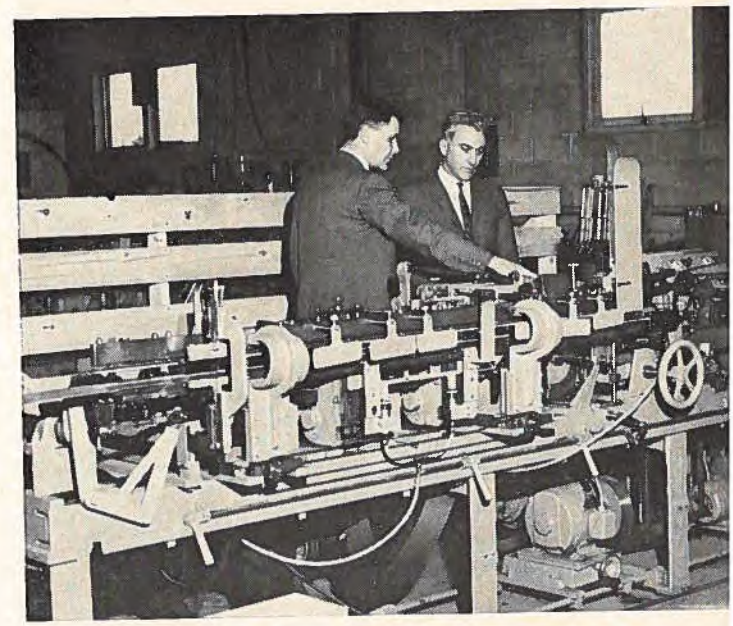
Often an exporter needs help over a long period before he is successfully launched in a foreign market. Robert Montreuil, the Regional Manager in Montreal (left) is shown working with Aime Racicot, president of Mon Tricot Novelty Knit Ltd., on export pricing. This firm now has customers in California and Michigan.

An agent for clothing lines based in St. Louis, Missouri, examines some quality leather garments. He was brought to Canada by the Department of Trade and Commerce to discuss representation of Canadian manufacturers. On the right is L. D. Robinson of the Winnipeg Regional Office, which arranged contacts in the Winnipeg area.

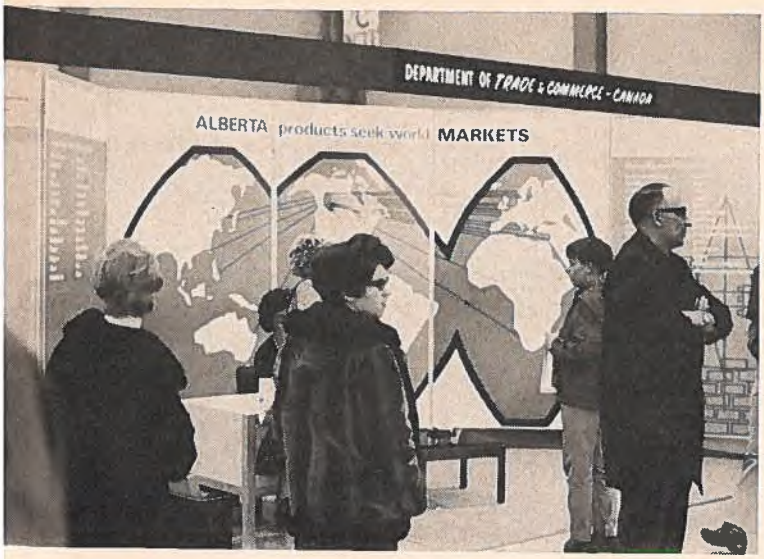
as a provincial trade fair or the planning of an itinerary for an incoming trade mission. Operation Export 1967 provided a prime example of how both levels of government helped to promote a common objective—interesting more Canadian firms in export trade.

The Department in Ottawa uses the Regional Offices to advantage in carrying out many aspects of its programs. They make all the local arrangements for visiting Trade Commissioners and for tours of industry by Assistant Trade Commissioners in training; they arouse interest among exporters in going into foreign trade fairs in which the Department has taken space; they plan regional itineraries for incoming trade missions; they assist in setting up Department-sponsored seminars or regional conferences. The telex between Ottawa and the seven cities with Regional Offices is always busy with requests, responses, queries, instructions and suggestions.

Practically all the offices carry out the functions described above but the emphasis naturally varies from region to region. In the Maritime Provinces, where many of the exporting firms are small, the officers spend a good deal of their time on problems of export documentation, tariffs, and paperwork that companies with a big export department can handle for themselves. In Newfoundland, the office devotes great attention to helping the fish exporters or aiding foreign inquirers to find sources of fresh or salted fish. And in Ontario, the Toronto staff works closely with Ontario firms with export interests, with



Relationships between Regional Officers and exporting firms are close and visits to plants play a part in this. Here D. J. Packman, Regional Manager in Halifax (right) listens intently as Alan Hallworth, Engineering Division, T. S. Simms & Co. Ltd., Saint John, N.B., describes production of automatic paint-brush manufacturing machines. One crated for export is visible in the background.



The close co-operation between the Regional Offices and the provincial trade departments takes many forms. One example was the Northwest Canadian Trade Fair in Edmonton last spring. Trade and Commerce was given exhibit space in the area allotted to the provincial Department of Industry and Development.

In St. John's, Newfoundland, one of the principal jobs of the Regional Officer, R. D. Peters (right) is assisting the export activities of the important fishing industry. Here he visits the Ross-Steers Fisheries Ltd. plant to see codfish wrapped in burlap, destined for Portugal.

Often the problem confronting the exporter is the correct tariff classification and valuation for duty of products going to the United States. The Office of Trade Relations of the Department advises on such problems and the Regional Offices help too. Gray Gillespie (left) of the Winnipeg office arranged for a manufacturer of fibreglass boats and canoes to consult with the Assistant District Director, U.S. Customs Service, Pembina, N.D. (right).

The Regional Offices frequently arrange appointments for businessmen who want to discuss their export prospects with Trade Commissioners on leave from foreign posts. Here Don Cheney (second from left), Consul and Senior Trade Commissioner in Chicago, examines a Winnipeg-made garment. On the right is Gray Gillespie, manager of the Winnipeg office, and on the left Murray Armstrong, Assistant Deputy Minister, Department of Industry and Commerce, Manitoba.

provincial government officials, with the CMA, the Toronto Board of Trade, and other Ontario-based trade and industry associations.

The Regional Offices in Vancouver and St. John's, Newfoundland, were originally established as Trade Commissioner posts some years ago and were later converted into Regional Offices. The Halifax office, covering the three Maritime Provinces, was opened in 1961, the Winnipeg office, covering Manitoba and Saskatchewan, in 1962, the Montreal office (Quebec) in 1964, the Edmonton office (Alberta) in 1965, and the Toronto office (Ontario) in April 1967. Combined, the seven offices employ 17 officers and 16 other staff.

However diverse his duties and however widespread his contacts, the Regional Officer has one objective: to promote Canadian export trade. He is, in fact, Mr. Trade and Commerce to businessmen in the province or provinces that he covers—an indispensable link between Ottawa and the exporting community in every part of the country. ●

Newest on the roster of Regional Offices is the one in Toronto, opened in April 1967. It is located in the new Toronto-Dominion Centre. Here the Regional Manager, R. Campbell Smith, (left), talks with (centre) Guy de Lusignan, supervisor of the Fairview Corporation, and Martin W. Mooney, supervisor of the International Division of the Toronto-Dominion Bank.

It is a matter of real satisfaction for the Regional Officer when a firm he has been assisting finally begins selling abroad. Mackenzie Hall, Regional Manager in Edmonton (right), inspects a shipment of glass fibre inner wrap for pipe linings from a firm in Fort Saskatchewan, destined for Taiwan and South Africa. With him is one of the company's executives.

Yugoslavia Plans Nuclear Power

RECENTLY CONSTRUCTION began on Yugoslavia's largest thermal power station on the banks of the Sava River 30 miles from Belgrade. This 2,400 mw. station will make available approximately 13½ billion kwh. of electrical power a year, equal to the output of all the hydro and thermal stations in Yugoslavia four years ago. At present there are 20 hydro and thermal power stations under construction. Among these is the hydro station being built jointly by Yugoslavia and Rumania on the Iron Gates section of the Danube which will generate approximately 11 billion kwh. a year and be one of the ten largest in the world.

Yugoslavia's power requirements are so great that the present production of 16 billion kwh. a year will have to be increased to 42 billion by 1975, 76 billion by 1980 and 110 billion by 1985.

Nuclear energy is one of the sources being considered to meet this increase in the demand for power and current plans envisage a nuclear station in operation by 1975. The decision to start on construction has not yet been taken but preliminary work began as far back as 1961.

Yugoslavia has its own sources of uranium. Approximately 20 per cent of the country has been surveyed and a number of deposits discovered, some of which can be exploited economically. A few years ago an installation was built to process ore and produce uranium dioxide. This can be processed further or used directly as a nuclear fuel. The Kalna plant in East Serbia has made uranium for research purposes. Work has begun on a plant to make reactor fuel elements, a project which is being directed by the scientific institutes in Belgrade and Ljubljana. The aim is to ensure that Yugoslavia has a share in the production of this important component of a nuclear station.

Yugoslavia has three research reactors. Examination of a system for the regulation of power will begin soon at the Ljubljana reactor which was built by Rade Koncar of Zagreb. At another, the use of reinforced concrete in the reactor container is being studied. The process for the production of graphite has been elaborated and a plant to extract plutonium for enriched fuel has been built.

Yugoslavia has uranium deposits to supply a 200 mw. nuclear power station for the next 20 years. This is a significant capacity when you consider that the nuclear power stations in the world now produce a total of roughly 9,000 mw.

Zen Burianyk, Commercial Secretary in Belgrade, (centre), welcomes President and Mrs. Tito to the Canadian Pavilion at the Zagreb Fall International Fair. They are standing beside a working model of a Canadian nuclear reactor.

Studies have shown that it would be most economical to build nuclear power stations in parts of the country which are short of other energy sources. The capacity should not be below 300 to 400 mw.; calculations indicate that construction of a nuclear power plant of 300 mw. would cost somewhere in the neighborhood of $70 to $85 million. The cost of a similar sized thermal power plant would be approximately $60 to $70 million. Although the cost of construction for a nuclear power plant is higher, the experts predict that the cost per kilowatt hour will be about 10 per cent lower, and lower still if a larger power station were to be built.

However, despite extensive preparations and the favourable conclusions of many studies, Yugoslavia could not undertake the construction of a nuclear power plant without financial and technical aid from other countries.

Reactors with common water and enriched uranium and heavy water reactors with natural uranium are in operation throughout the world and Yugoslavia's choice will depend on how far it can be independent in the supply of nuclear fuel. Should a reactor using enriched uranium be selected, the fuel would have to be imported from Britain, the United States or the Soviet Union. Greater independence would be achieved if the reactor used natural uranium, for Yugoslavia has excellent prospects of providing its own fuel and building its own heavy water plant.

For these reasons, special significance is attached to the choice of reactor and consultation is taking place between the Federal Commission for Nuclear Energy (which will construct the plant) and the end users.

Discussions over the past two years with probable suppliers of equipment for nuclear power stations have shown that Yugoslav industry can participate to a great degree in both design and construction. Credit will have perhaps the greatest influence on the final choice of source because a large portion of the cost of the reactor will have to be financed abroad on a long-term basis.

It is expected that the decision on the type of the reactor, the source of the power plant and the starting date for construction will be made by the end of 1967 or early in 1968.

—Z. W. BURIANYK,
Commercial Secretary, Belgrade.

Spain Prepares Second Development Plan

I. W. CEBAS, *Office of the Commercial Counsellor, Madrid.*

SPAIN'S Economic and Social Development Plan 1964-1967 has now almost run its course. The Plan Commission recently published provisional figures showing progress made to the end of 1966. In some areas the targets for the first three years have been reached or passed, but in other areas achievement fell short of expectations. The most serious failure was in the agricultural sector which is crucial to the country's further economic development.

Between 1964 and 1966, Spain's GNP rose by 24 per cent at constant prices, investment went up by 51 per cent, and productivity increased 22.8 per cent. In 1966 the volume of trade reached U.S.$4,844 million, 79.8 per cent more than in 1963. Between 1963 and 1966, wages and salaries rose by 62.4 per cent. Per capita income reached U.S.$665 in 1966 and the standard of living improved rapidly as figures for the consumption of certain foods show (see Table I). In 1965-66 some 872,000 new jobs in industry and services were created; in 1964-66, 605,000 workers moved out of agriculture.

Output of consumer durables rose, particularly the production of TV sets, refrigerators and washing machines (see Table II). Between 1963 and 1966, car ownership doubled. Per capita consumption of steel increased by 72.1 per cent over the 1963 figure, of cement by 48.5 per cent, and of electric power by 69.4 per cent (see Table III). There was a great increase in educational facilities, particularly secondary schools and universities.

Measured against the planners' targets for 1966, the industries which did especially well were automobile and industrial vehicle production, shipbuilding, papermaking, and electric power generation. Among those which lagged behind were coal, aluminum, sulphuric acid and fertilizers (see Table IV).

Public investment in 1966 reached U.S.$1,424 million, utilizing 99.5 per cent of the investment credits granted under the Development Plan. More was spent on housing and town planning, transport, and research than was planned and less on agriculture and irrigation, education and vocational training, and subsidies to industrial development areas (see Table V). Private financing in 1966 fell to U.S.$2,882 million from U.S.$3,325 after the Government took steps to reduce the availability of credit.

Wage and salary increases put more buying power into consumers' hands and prices rose, but not as sharply as in the previous year. There was another substantial increase in Spain's balance-of-payments deficit in 1966 which reached U.S.$210 million compared with U.S. $117 million in 1965. Inflation in Spain tended to reduce tourist receipts and push up the cost of goods for export. Depressed conditions in other European countries resulted in less money being sent home by expatriate Spanish workers. However, as foreign currency reserves are expected to be U.S.$700 million when the Plan ends this year, there is still room for manœuvre.

In its review of the first three years, the Plan Commission pointed out that, although it had been a period of intensive growth, the necessary improvement in production had not been achieved and some of the basic problems of the Spanish economy still remained to be solved. Monetary policy has been the Government's main instrument and this has tended to accentuate deficiencies in the private sector.

The shortcomings of the current Plan were taken into account when the Second Development Plan was drawn up. In the 1968-1971 Plan, a determined effort will be made to reduce the need for massive imports of food. Agriculture will be reorganized along the lines suggested in the joint World Bank/Food and Agriculture Organization report. This means switching from wheat to feedgrains for beef production and growing more oilseeds and vegetables for export—a long-term program which will not eliminate the need for substantial imports during the next four years to stabilize food prices.

The main features of the Second Plan are an annual 9 per cent growth (6 per cent at constant prices) in the GNP between 1968 and 1971, the creation of almost a million new jobs in manufacturing and service industries (with a reduction of 407,000 on the land), an increase in productivity of 4.45 per cent a year, and a rise in the cost of living of only 3 per cent a year. (In 1964 the cost of living went up 6.9 per cent, in 1965, 13.2 per cent, and in 1966, 6.2 per cent.) Imports are planned to rise at a rate of 9.4 per cent annually, exports by 12.5 per cent, and income from tourism by 9.5 per cent (see Table VI). The Plan Commission stresses that achievement of these targets depends on:

- More productive investment, not merely more investment.
- An all-out export drive.
- Concentrating on improving the industrial structure where its defects hinder industrial development as a whole, and allowing the free play of competition in other areas.
- Keeping public expenditure to the limits set by the Plan.
- An improved method of levying taxes.
- Moderation in private consumption and encouragement to save.
- An effective prices and incomes policy.
- Flexibility in the labour market and an effective system of unemployment benefits.
- General planning being accepted as applying to the whole economy.

TABLE I

SPANISH PER CAPITA CONSUMPTION OF CERTAIN FOODS

	1963	1966	Change (per cent)
Meat, kg.	26.31	31.95	21.4
Fish, kg.	16.75	19.54	26.7
Sugar, kg.	20.43	23.79	16.4
Eggs, doz.	15.33	17.47	14.0
Milk, litres	64.08	66.20	3.3

TABLE II

DURABLE CONSUMER GOODS IN SPAIN

Domestic Production	1963	1966	Change (per cent)
	(number of units)		
Television sets	315,000	630,000	100
Refrigerators	243,000	630,000	159.3
Washing machines	227,000	400,000	76.2
Number in use per thousand inhabitants			
Telephones	73.7	94	27.9
Automobiles	17	33	98

TABLE III

SPANISH PER CAPITA CONSUMPTION OF INDUSTRIAL PRODUCTS

	1963	1966	Change (per cent)
Gasoline, litres	39.8	59.8	48
Steel, kg.	111	191	72.1
Cement, kg.	266	395	48.5
Electricity, kwh.	643	1,089	69.4

TABLE IV

GROWTH OF SPAIN'S INDUSTRIAL PRODUCTION

	1963	1966	
		Actual	Target
Coal, '000 tons	15,547	15,647	20,900
Electricity, gwh.	25,897	37,700	35,599
Petroleum refining, '000 tons	10,729	17,131	15,760
Steel, '000 tons	2,750	3,847	3,990
Cement, '000 tons	7,133	11,813	12,600
Aluminum, tons	46,396	62,894	70,000
Sulphuric acid, '000 tons	1,495	1,517	2,282
Shipbuilding, g.r.t.	134,616	344,768	263,000
Automobiles, units	79,214	257,910	145,032
Industrial vehicles, tractors, units	61,219	107,870	61,441
Percentage growth rates compared with previous year			
Chemicals	13.9	11	10.8
Fertilizers	12.7	13	17
Paper	20.3	19.2	10

TABLE V

SPANISH INVESTMENT IN THE PUBLIC SECTOR

	Planned	Carried out
	(million pesetas)	
Education and vocational training	6,387	5,993
Housing and town planning	16,829	18,207
Health and social services	1,158	1,291
Information services	46	254
Agriculture	4,931	3,737
Irrigation schemes	12,198	9,506
Transport	22,099	27,972
Telecommunications	419	369
Tourism	374	407
Scientific investigation	443	618
Home trade	195	224
Other sectors	3,375	2,745
Subsidies to industrial development areas	1,250	242
Financial investment	14,930	13,907
Investment approved by Government	1,250	—
Total (million pesetas)	**85,883**	**85,465**
Total (U.S.$ million)	**1,431**	**1,424**

TABLE VI

FRAMEWORK OF SPAIN'S SECOND DEVELOPMENT PLAN

	1967*	1968	1969	1970	1971
	(billion pesetas with percentage growth in brackets)				
GNP	1,641	1,791 (9.18)	1,956 (9.18)	2,135 (9.18)	2,331 (9.18)
Imports	249	273 (9.4)	298 (9.4)	327 (9.4)	357 (9.4)
Private consumption	1,143	1,244 (8.7)	1,351 (8.7)	1,468 (8.7)	1,596 (8.7)
Public consumption	163	190 (16.7)	209 (10.0)	228 (9.2)	246 (8.0)
Gross capital formation	396	420 (6.0)	456 (8.7)	497 (9.0)	545 (9.5)
Exports	188	212 (12.5)	238 (12.5)	264 (12.5)	302 (12.5)

* Forecast figures for 1967 on which percentage growth is based.

More Trade Opportunities

The rapid growth in Spain's economy has created opportunities for Canadian exporters to supply machinery for industry, raw materials and consumer goods. A careful study of the Second Plan will show you the kinds of goods that are likely to be most in demand and the Canadian Trade Commissioner in Madrid will be glad to sound out the market for your particular product. You can also get practical advice from Canadian manufacturers who have experience in exporting to Spain, and the services of the Department of Trade and Commerce are but a telephone call away. ●

What's current in commodities?

Scientific Instruments

Germany—**Although Germany is a leader in this field and exported instruments worth $200 million last year, Canadian manufacturers were able to sell there and could probably sell more.**

J. A. ELLIOTT, *Consul,*
and
G. D. VALENTINE, *Consul,*
Duesseldorf.

WEST GERMANY is well to the fore in scientific research. Since the war no less than eleven of its scientists have won or shared Nobel prizes in physics, chemistry or medicine—a sign of the emphasis placed on scientific research by both the Government and private industry.

The expansion of research work has led to an unprecedented demand for laboratory and scientific instruments. There are many well-known German firms like Zeiss and Leitz, whose names are familiar in laboratories around the world. In 1966, German exports of laboratory and scientific equipment were in fact valued at more than $200 million.

Nevertheless, imports of this type of equipment amounted to $10 million in that year and will certainly increase as effort is stepped up in such fields as space research, nuclear technology and medicine. West Germany now spends roughly 1.7 per cent of its GNP on research and this will probably rise to 3 per cent in the 1970's. Government expenditure through the Science Ministry, for example, increased by 28 per cent in 1966.

Canada Can Sell More

Canadian exporters already have a share of this market and there is no reason why it could not be increased. Newly developed or unique articles have the best chance, but standard items are also saleable provided the price and quality are significantly more attractive than those of competing products made in Germany or other EEC countries.

There is no universal method of selling this equipment in Germany but most small and medium-sized items (up to about $1,000) are sold through wholesalers who contact the end-user. Because instruments are not bought by individuals, there is virtually no retail trade, except in cheap microscopes and other goods purchased by students or hobbyists. Larger items particularly are usually sold direct by the manufacturer to the laboratory, university or institute that requires them; many are custom-built, and often (but unfortunately not always) contracts are awarded after calling for public tenders. Direct sales of this kind make it necessary to have a large sales force to keep in touch with prospective customers. Canadian firms seldom can afford frequent transatlantic sales visits which rarely pay off in this field, so a good agent is essential. The agent's sales force should, however, be supported with regular visits by technical personnel from Canada.

Ways to Provide Service

Scientific equipment usually requires considerable after-sales service. Service networks in Germany are almost always run by the manufacturer. Many manufacturers, however, are willing to take on foreign lines which complement and do not compete with their own products. The lines most suitable for this treatment are those where the development and fixed costs make it uneconomical for a German firm to turn out small quantities. Sometimes German manufacturers are interested in a reciprocal arrangement whereby each firm distributes the other's products. (This has the advantage of decreasing the likelihood of one party copying the other's line.)

Agents who are not manufacturers require more support. They need promotion material and some sort of cost-sharing arrangement for advertising and warehousing expenses. Because Germany is a large country without a real economic centre it is almost impossible for one agent to cover the whole country, no matter what he says to the contrary. Three agents—for the north, the Ruhr and the south—seem to be the normal minimum but certain lines might require more.

The Canadian manufacturer should start with a preliminary on-the-spot survey of the market, including calls on prospective customers such as universities, federal and state government institutes, and private firms.

Research in any given field is usually in the hands of a few firms or government bodies. Space research, for example, is an entirely government operation carried out by the Gesellschaft für Weltraumforschung which was set up in 1962 to supervise Germany's ELDO participation. Nuclear research is done by the Nuclear Research Institutes in Karlsruhe, Jülich, Munich, and Hamburg, and at the power reactor sites (see *Foreign Trade*, May 27, 1967, issue, page 29), and the Euratom facilities used by German scientists. Research in the chemical, pharmaceutical, steel and electrical fields is largely in the hands of private firms.

Visit Trade Fairs

Besides making contact with potential customers, the initial survey should include a visit to the appropriate international trade fair and calls on possible agents. Trade fairs include:

- PHOTOKINA for optical and photographic equipment (to be held next in Cologne in the fall of 1968).

• ACHEMA for chemistry and nuclear science (next one to be held in Frankfurt in 1970).

• INTERKAMA for automation, electronics and instrumentation (to be held in Duesseldorf from October 9 to 15, 1968).

• DIDACTA for educational material (Hannover June 5 to 9, 1968).

• FAB for hospital requirements (Munich June 19 to 22, 1968).

In addition to these specialized fairs, the annual German Industries Fair (held in Hannover in April and May) provides a showcase for industrial products of all types and includes an excellent electronics section.

If the preliminary survey shows that your products can find a place in the German market, the next step is the provisional appointment of agents and distributors to make those products available to German customers. Then you should exhibit at the fairs—but do not do so before you are ready to take orders or you may do lasting damage to your sales effort.

Study German Standards

Your literature should be available in the German language. Manufacturers of scientific instruments not yet using the metric system must make the change before they can sell them in Germany.

German standards (see *Foreign Trade*, May 28, 1966, issue) are mandatory for most electrical equipment, especially those such as X-ray installations which could be dangerous. Approvals can be obtained from the following organizations:

Verband Deutscher Elektrotechniker
(Electrical equipment)
Fachnormenausschuss
Chemischer Apparatebau
Laborgeräte
(Chemical equipment)
Physikalisch-Technische
Bundesanstalt

Once your product is approved and you have found a good distributor and given him adequate support, it is a question of the product's ability to stand up to international competition. It will have to compete with German goods and imports which come mainly from the United States, Switzerland and Britain. Amazingly, EEC suppliers have not captured very much of the market which means that, in most fields, Canadian manufacturers face no tariff disadvantage when they compete with major foreign suppliers.

The Canadian Trade Commissioner Service offices in Germany are ready to assist you at each stage of your program. They will arrange introductions and appointments and advise you on the conditions affecting your product. All it takes to get the ball rolling is a letter from you. Why not write now? ●

Fine Foods

Midwestern States—Three major selling factors are required if fine foods are to sell in this area—quality, distinctive packaging, unique appeal. Offered at a price competitive with domestic products, Canadian foods should find an encouraging market.

ROBERT F. SEBASTIAN, *Commercial Officer, Chicago.*

AS ONE of the world's largest and most efficient food merchandisers, the United States has become a leader in marketing techniques. Selling Canadian foods in the U.S., therefore, could be compared to the saying—*It's bringing coals to Newcastle*—except for gourmet foods.

Here is a class of foods which thrives on an import image and lends itself to specialized advertising. Canadian manufacturers of fine foods should look carefully at this market in the Midwestern States, where acceptance of specialty food products is increasing.

Sales Channels

Assuming you have a competitive product, how can it be marketed? Basically there are three ways. The simplest is by direct sales to retail gourmet outlets, where 40 per cent off retail is usually required. This is a reasonably easy way to enter the market, but unless there is continuous effort by the company's own sales force, the demand will probably fall quickly.

The second marketing channel is to establish a distributor. In Chicago there are two national and several regional distributors. These usually require 20 per cent off the wholesale list price for distributing the product to retailers and jobbers. Jobbers normally service a small percentage of retailers on a selective basis.

A third method is through a gourmet broker. There are a limited number of these specialists in the Midwest, and the Chicago office is in contact with most of the major companies in its area. The broker gets 10 per cent commission on sales to retailers and 5 per cent based on the distributor's price when sold to them.

Getting Started

How do we get started? This is often the plaintive cry of interested exporters. Fine food producers echo this appeal.

When exploring the U.S. market, good introductory promotion is always an advantage, but it should be backed by an acceptance of the American consumer's image—among the most sophisticated in the world. And what does the sophisticated American buyer of fine foods expect?

• Quality

• Well-designed, distinctive packaging

- Unique product appeal
- Prices to compete with domestic brands.

Quality can sell the product and often sets the price, but distinctive packaging is still needed to present a vibrant selling image. This can be a critical selling factor.

Walk into any U.S. retail food outlet and you will be constantly reminded of the demands made on good packaging design. For fine foods, this becomes even more essential and is a stiffer challenge to the Canadian exporter.

Product appeal is measured by the uniqueness of the product, such as an unusual flavour or origin—and the price must be relative.

Introducing the Product

Armed with effective promotion and a strong sales approach, the Canadian fine food exporter would find little opposition from American food advertising. This veers strongly toward the promotion of basic foods (cereals, jams, soups, etc.), leaving an open door for the infiltration of specialties.

As an alternative to in-store promotion (such as product demonstrations), giveaways have proved successful in this area. For instance, one case of goods free for every 10 purchased, or tieing a giveaway in with a 60- or 90-day order. In some cases, allowing the retailer to place small orders enhances the buyer's interest. Finally, a pricing structure which reduces the unit cost as the volume increases often assists in moving the product steadily.

Although there are a number of ways by which a retailer, distributor or broker can be persuaded to push a product, the most obvious method is by increasing product profitability.

Offering a retailer a price which allows 45 per cent instead of a 40 per cent mark-up, the distributor 25 per cent in place of a 20 per cent discount, or the broker 15 per cent as against the usual 10 per cent commission increases the likelihood of its promotion.

We Can Help

Two important factors should be remembered when attempting to enter the Midwestern States' fine foods market:

- an open mind
- a flexible attitude.

An open mind is necessary to accept the often different way in which a product is marketed in the U.S. and flexibility is required to adjust to these differences.

The exporter who wishes to have a survey made of a potential market should send product literature (showing duty-paid c.i.f. Chicago prices) with samples and company information to:

Canadian Consulate General,
310 South Michigan Avenue,
Suite 2000,
Chicago, Illinois, 60604.

This office would be pleased to evaluate the market and report on it.

Of course, the best way to determine marketing possibilities is for the manufacturer or agent to make a trip personally. First-hand knowledge is always an added incentive to explore further. ●

Egypt's Foreign Trade

THE FOREIGN TRADE of the United Arab Republic totalled £E.728.5 million in 1966 against £E.669.0 million in the previous year, resulting in a deficit of £E.202.3 million against £E.142.7 million in 1965. This trade deficit has increased each year for the past five, with the exception of 1965, when it was 22.2 per cent below 1964.

The UAR's principal trading partner was Eastern Europe (£E.255 million against £E.221 million in 1965). Next came Western Europe with £E.193 million, North America with £E.108 million, and the Afro-Asian countries with £E.104 million. Trade with the Arab League amounted to £E.49 million and with Canada to only £E.1.7 million.

Imports rose to £E.465.5 million in 1966 compared with £E.405.8 million in 1965, an increase of 14.7 per cent. There was a marked increase in imports of intermediate and capital goods for development projects and of consumer goods and foodstuffs to meet the requirements of a growing population. The biggest rise was in industrial machinery and equipment—to £E.73.0 million, from £E.44.7 million in 1965. Other leading imports were agricultural machinery and parts (£E.24.4 million to £E.33.1 million) and electric machinery and equipment, (£E.22.6 million to £E.27.9 million).

Because of the continued pressure of local consumption on production and the decrease in exports of raw cotton by £E.2.8 million and of cotton yarn by £E.200,000, exports remained at £E.263.2 million. The fall in shipments of certain products was compensated by the rise in others, such as rice, (up from £E.19.8 to £E.21.2 million) and potatoes (from £E.1.2 to £E.2.5 million).

The Government now has complete control of 100 per cent of imports and 75 per cent of exports. The private sector is permitted to handle the remaining 25 per cent of exports.

Because of a severe shortage of foreign exchange, imports are restricted mainly to foodstuffs and essential consumer commodities, capital goods and machinery, and raw materials for industry. These are imported from Eastern European countries whenever possible, because of payment agreements which involve no spending of foreign currency. An allocation system has also been set up whereby each import requiring foreign exchange must now be referred to a High Planning Committee for approval before a contract is signed. These restrictions, however, are temporary and will be eased as soon as the situation improves. Yet economic conditions are likely to remain difficult for some years.

—M. KARKEGI, *Commercial Assistant, Cairo.*

trade lines

Canadian wines find markets abroad

Canada in 1966 exported wine valued at about $40,000, of which $32,000 worth went to the U.S., $5,000 to Britain, and $3,000 to the Caribbean. Export sales for 1965 totalled $38,000, of which $29,000 went to the U.S., $4,000 to Britain, and $5,000 to the Caribbean. Sales for the first half of 1967 totalled $27,000—$16,000 to the U.S., $8,000 to Britain, and $3,000 to the Caribbean. Canadian wine producers, who ship mainly in bulk, participated successfully in the National Association of Retail Grocers Food Fair in the U.S., and the Ideal Homes and British Food Fair in Britain.

Swedes buy canned and frozen beans

There is a steady demand for quotations from Canada for canned beans and more recently, for frozen beans, whole and sliced. In 1965 Canada exported to Sweden canned green and waxed beans valued at $59,000, and in 1966 these sales rose to $89,000. In that year Swedish consumption of frozen green and waxed beans was valued at $568,000, of which $385,000 represented imports. Canada has yet to enter the new and growing market for frozen beans in Sweden—Stockholm.

Germany will finance cassava plant in Ghana

A new plant to dry and process cassava will be built in Ghana and the product exported to Germany for the starch industry and for the manufacture of pig and poultry feed. Finance is to be provided by Kathman Company of West Germany. Later cassava may be exported to other countries. It is hoped that the plant will earn 20 million new cedis a year in foreign exchange and help to offset the declining income from cocoa—Accra.

Swedish nuclear power plans

Sweden is expected to have 6,000 MWe of nuclear power installed by 1980. If light water reactors are used, this will mean an annual cost of about Can.$104 million for reactor fuel, or Can.$42 million if heavy water reactors are chosen. In either case, the manufacturing cost will be about Can.$31 million. The development and manufacture of fuel elements are considered very important for the Swedish nuclear industry—Stockholm.

Consumption of frozen foods increasing in Belgium

Younger housewives in Belgium are making greater use of frozen foods. These have become more popular with the introduction of commercial deep-freeze units in supermarkets and an increased number of domestic refrigerators, both generally unfamiliar to consumers eight years ago. Consumption of frozen foods has risen from 900 metric tons in 1960 to 14,000 metric tons in 1966—Brussels.

Italy builds oilseed crushing plant

Olearia Tirrena has just built an oilseed crushing plant at Aprilia, south of Rome, with a capacity of 90,000 metric tons—a quarter of Italy's production. Consumption of seed oil has increased elevenfold in 15 years and is running at about 400,000 tons a year. Canada's exports of oilseeds to Italy have risen from $360,000 in 1964 to $6 million in 1966—Rome.

Greece is making wire rope

Production has begun at the new plant at Volos, jointly owned by Nordeutsche Drahtzeilwerk Co., A. Brinkman of Bremen and N. Levenderis S.A. of Piraeus. The plant cost $500,000 and can turn out 150 tons of wire rope a month for marine, fishing and industrial purposes. It will make the country self-sufficient in steel wire rope. It is planned to increase production later to 350 tons a month, with an additional investment of $1.5 million—Athens.

U.S.S.R. buys Innocenti plate presses

An order for 142 cold-working plate presses for the automobile factory that FIAT is building in the Soviet Union has been placed with Innocenti of Milan. The presses, worth $30 million altogether, are of the most modern automated type and will be manufactured in collaboration with USI-Clearing of Chicago. They will support manufacture of 2,000 vehicles a day. FIAT will consider suitable Canadian machinery or equipment for the Soviet project—Rome.

French steel output rises sharply

Production of steel in the EEC in September 1967 reached 7.74 million metric tons, 833,000 more than in the previous month. French production was half a million tons more and all other members did better, except West Germany whose output was 87,000 tons less. Figures for the first six months of 1967 show

imports into the EEC of 1.27 million tons (15.7 per cent more than in the same period of 1966), and exports of 7.17 million tons (17.8 per cent higher). West Germany imported 18.6 per cent less steel than in the first half of 1966 and exported 38 per cent more—Duesseldorf.

New port facilities at Antwerp

The Zandvliet lock and adjacent docks at Antwerp were opened in October. It will allow large ships to berth seven miles nearer the open sea and provide an entrance to three new docking areas. The Winston Churchill dock is the first in Belgium built especially for container traffic—Brussels.

Proposal to expand O'Hare airport

Chicago is to consider a plan drawn up by Landrum and Brown of Cincinnati for a $280 million expansion program for O'Hare airport. The proposal includes doubling the size of the present terminal building, two or three additional runways, and automated baggage handling. It is not intended to replace the proposal for a third airport in Chicago—Chicago.

Scotland faces formidable housing problem

Scotland is in dire need of new housing developments to meet the demands of its population of five million. Although 600,000 low-rental council homes have been built in the last 21 years, two-thirds of the population live in homes built before 1945. Some 700,000 of them were built before 1916 and 200,000 are over 90 years old. It is estimated that 500,000 council homes are needed to replace slums and 30,000 to overcome the present shortage. This huge building program will provide many opportunities for Canadian materials—Glasgow.

Million German babies last year

Over a million babies were born in West Germany in 1966 and 13 million of the population are under 15 years of age. The German children's wear trade has romped through the recession and a group of Canadian manufacturers are going to show their garments in this thriving market at the International Fair for the Child in Cologne next spring under Trade and Commerce sponsorship—Duesseldorf.

Brazil waives taxes and tariffs for steel mills

Two years' exemption from duties, industrialized products tax, and customs clearance charges has been granted under Law 5,295 to five steel mills in Brazil: Usinas Siderurgicas de Minas Gerais (USIMINAS), Companhia Siderurgica Paulista (COSIPA), Companhia Ferro e Aco Vitoria (COFEAV), Siderurgica de Santa Catarina (SIDESC), and Aco de Minas Gerais (ACOMINAS). It applies to machinery, equipment, spare parts, accessories, tools, refractory material and metal structures and also covers goods already imported and cleared against signature of a responsibility bond—Rio de Janeiro.

Steel powder plant being built in Sweden

Hoganas Billesholms AB is building a 40,000-ton atomized steel powder plant in Sweden at a cost of Can.$2.7 million. It will be in operation in 1969—Stockholm.

Cunard withdraws more ships from North Atlantic

The *Queen Mary* has already been sold and the *Queen Elizabeth* will be sold next year. Three other ships—*Caronia, Carinthia* and *Sylvania*—are to be sold, leaving Cunard with only three passenger liners—Liverpool.

Gas turbines in Venezuela's oilfields

At Lake Maracaibo a $10 million plant for gas injection, the first in the world to use gas turbines to drive reciprocating compressors, is about to go on stream. It is a joint venture of Phillips Petroleum Co. and Cia. Shell de Venezuela and is designed for unattended operation—Caracas.

Macao firecrackers still sparkling

The ban on firecrackers by Hong Kong authorities has had little effect on Macao's production. In the first six months of this year, exports amounted to $1 million with the U.S. taking $800,000 worth—Hong Kong.

British industrial show set for Rumania

The British Board of Trade plans a solo industrial exhibition in Bucharest next year. Rumania had a favourable trade balance of over $12 million with Britain in 1966 which jumped to more than $40 million during the first nine months of this year—London.

Italy plans industrial program

The Italian Government recently announced a $5.2 billion program of investment in industry and public utilities for the next three to five years. Allocations are as follows: mechanical engineering $776 million; auto plant (Alfa Sud) $500 million; steel industry $750 million; shipbuilding $118 million; telephone services $1,183 million; television $90 million; aviation (Alitalia) $90 million; superhighways and roads $1,666 million. A feature of this program is that about half of the

funds are intended for the Mezzogiorno (Fund for the South) Development Project to develop a greater balance of economic strength between the north and the south—Milan.

East Africa decides to go metric

Kenya, Uganda and Tanzania will begin to change weights and measures to the metric system next year. The Customs will accept dual declarations from January 1, 1968, but metric declarations will be mandatory after January 1, 1969. In time, engineering, architecture, surveying and building will be affected by the change. Schoolchildren will also be taught the new system—Nairobi.

New Zealand steel mill needs equipment

The annual report of New Zealand Steel Limited just published reveals there is still a great deal of ancillary equipment to be purchased for this new mill. Any interested firms should contact the Canadian Trade Commissioner in Wellington or the Department of Trade and Commerce in Ottawa—Wellington.

West Germany exports more industrial products

Despite a 7.7 per cent slump in domestic consumption, West Germany's industrial sales during the first six months of this year only fell 5 per cent compared with the same period in 1966 because of a 9.4 per cent rise in exports to $9.3 billion. Exports as a percentage of total sales advanced from 15.7 per cent in 1965 to 17.1 in 1966 and 19.2 for the first half of this year—Duesseldorf.

Spanish road program shifts into high

Spain is embarking on a vast highway program which will cost more than U.S.$5.5 billion and be completed by the 1980's. This includes U.S.$4.4 billion for seven toll roads stretching some 1,800 miles. Work has already begun on the improvement of 3,000 miles of existing highways at a cost of some U.S.$333 million—Madrid.

Italy builds new automobile plant

Cornerstone of the Italian Government's $5.2 billion industrial and public utility investment program is the recently announced "Alfa Sud" automobile plant to be built near Naples. The $500 million auto plant is intended to modernize and prepare the industry against competition when customs barriers no longer exist between EEC countries. As well, Alfa Sud will employ 14,000 workers in the depressed south and take another 4,000 workers from other state industries already overstaffed. Professor Petrilli, president of the state-owned Italian Reconstruction Institute (IRI), stated that considerable plant and equipment for Alfa Sud will necessarily be purchased abroad. Canadian suppliers will be alerted by our Milan office—Milan.

Singapore to expand telephone services

The World Bank has approved a $3 million 20-year loan to the Singapore Telephone Board to assist in a two-year construction program to expand the automatic telephone exchange. In addition to increasing the number of lines from 86,000 to 122,000, the program also includes the extension of outside facilities, such as underground cables, lines and telephones, and an automatic trunk exchange between Singapore and Malaysia. Singapore's 1.9 million people consider the system of paramount importance for commercial efficiency in this well-developed 225-square-mile community. The increase in subscribers of 8 per cent a year in the past five years is expected to be exceeded during the next five. Total cost of the program is estimated at $9.5 million, of which $6.2 will be in foreign exchange. The Bank's loan will cover $3 million of the foreign exchange requirements and will be used for equipment and materials to be purchased abroad on international competitive bids—Singapore.

Foreign Tariffs and Trade Regulations

Kenya

TARIFF CHANGE—The Kenya Government has announced that it plans to change over to the Brussels tariff nomenclature. This change will take effect from January 1, 1968. The new tariff is for all intents and purposes simply a transposition of the existing tariff—Nairobi.

South Africa

REGULATIONS FOR IMPORTS OF TEXTILES—The South African Government has ruled that, as of November 6, 1967, an extra copy of any invoice relating to textile fabrics must be given to Customs and Excise at the time of clearance.

Prescribed invoices shall also state the name and address of the agent or the confirming house and the supplier's sample number of the fabric, and shall have attached thereto a sample of the fabric in question. This sample must be at least six inches by three inches and stamped with indelible ink, giving the name of the supplier and the sample number.

Foreign Exchange Rates

These nominal quotations may help exporters in checking prices, but they should consult their banks before making any firm commitments. When more than one rate is shown, the one to be used depends on the commodity traded. Information on the rate for any specific commodity may be obtained from the Office of Trade Relations, Department of Trade and Commerce, Ottawa.

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

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

For conversion of column one to the U.S. dollar equivalent, *multiply* **by .93. To convert column two,** *divide* **by .93.**

Country and Currency	Value of Foreign Currency unit in Canadian dollars	Value of Canadian dollar in foreign currency units
	at November 9	
Algeria Dinar	.2192	4.56
Argentina Peso (free)	.0031	322.58
Australia Dollar	1.20	.8333
Austria Schilling	.0415	23.98
Bahamas Dollar	1.046	.9560
Belgium and Luxembourg Franc	.0216	46.25
Bermuda Pound	2.989	.33
Bolivia Peso	.0902	11.07
Brazil Cruzeiro (official free)	.3974	2.51
Britain Pound	2.989	.33
British Honduras Dollar	.7473	1.33
Burma Kyat	.2256	4.43
Ceylon Rupee	.2242	4.46
Chile Escudo (bank rate)	.1934	5.17
(free)	.1705	5.87
China, Republic of New Taiwan Dollar (official)	.0233	42.92
Colombia Peso (fixed)	.066	14.95
Congo, Republic of[1] Franc	.0072	139.50
Costa Rica Colon	.1621	6.17
Cuba[2] Peso	.....	.....
Czechoslovakia Koruna	.1492	6.68
Denmark Krone	.1547	6.46
Dominican Republic Peso	1.074	.93
Ecuador Sucre (official)	.0597	16.67
(free)	.0541	18.42
El Salvador Colon	.4296	2.33
Fiji Pound	2.693	.37
Finland Markka	.2557	3.91
France, Monaco, etc.[3] Franc	.2192	4.56
Franco-African Republics[4] Franc	.0044	227.79
French Pacific[5] Franc	.0121	82.64
Germany D Mark	.2694	3.71
Ghana New Cedi	1.053	.95
Greece Drachma	.0358	27.86
Guatemala Quetzal	1.074	.93
Guyana Dollar	.6226	1.61
Haiti Gourde	.2148	4.66
Honduras Lempira	.5370	1.86
Hong Kong Dollar	.1868	5.35
Hungary Forint (official)	.0921	10.86
Iceland Krona (official)	.0250	40.00
India Rupee	.1428	6.99

Country and Currency	Value of Foreign Currency unit in Canadian dollars at November 9	Value of Canadian dollar in foreign currency units at November 9
Indonesia[6] Rupiah	.....	.....
Iran Rial	.0142	70.42
Iraq Dinar	3.007	.33
Ireland Pound	2.989	.33
Israel Pound	.3580	2.79
Italy Lira	.0017	581.86
Japan Yen	.0030	335.37
Kenya Shilling	.1402	7.13
Lebanon Pound (free)	.3330	3.00
Malaysia Dollar	.3509	2.85
Mexico Peso	.0859	11.61
Morocco Dirham	.2124	4.71
Netherlands Florin	.2987	3.35
Netherlands Antilles Florin	.5695	1.76
New Zealand Dollar	1.489	.67
Nicaragua Cordoba	.1534	6.52
Nigeria Pound	2.989	.33
Norway Krone	.1502	6.66
Pakistan Rupee	.2242	4.50
Panama Balboa	1.074	.93
Paraguay Guarani (free)	.0086	116.28
Peru Sol (free)	.0271	36.90
Philippines Peso (free)	.2744	3.64
Poland Zloty (fixed basic rate)	.2685	3.72
Portugal & Colonies[7] Escudo	.0374	26.66
Saudi Arabia Riyal	.2066	4.84
Sierra Leone Leone	1.494	.67
South Africa Rand	1.494	.67
Spain & Dependencies Peseta	.0179	55.55
Sweden Krona	.2076	4.82
Switzerland Franc	.2486	4.02
Syria Pound (free)	.2812	3.56
Thailand[1] Baht (free)	.0521	19.19
Tunisia Dinar	2.062	.48
Turkey Lira	.1193	8.36
United Arab Republic Pound (official)	2.470	.40
United States Dollar	1.074	.93
Uruguay Peso (free)	.0054	185.18
Venezuela Bolivar (official free)	.2391	4.18
West Indies Dollar[8]	.6226	1.61
Pound[9]	2.989	.33
Yugoslavia Dinar (official)	.0860	11.63

1. Additional rates are in effect.
2. There is no trading in Cuban pesos in U.S. or Canadian banks at present.
3. Franc is also used in French Guiana, Guadeloupe and Martinique.
4. Chad, Central African Republic, Congo, Dahomey, Gabon, Ivory Coast, Mali, Islamic Republic of Mauritania, Niger, Senegal, Upper Volta, Cameroons, Togoland, and Malagasy. Also Reunion, Comoro Islands, St. Pierre and Miquelon.
5. New Caledonia, New Hebrides, French Polynesia.
6. Because of the complexity of the Indonesian exchange rate system, it is impractical to quote a single representative rate for the rupiah.
7. Approximately same rate for Portuguese territories in Africa.
8. Barbados, Trinidad and Tobago, Leeward and Windward Islands.
9. Jamaica.

Marketing Data Sheet

JAPAN

Area

229,772 square miles.

Climate

Monthly average temperatures in Sapporo (Hokkaido) vary from —5.5°C in January to 21.7°C in August; in Tokyo (Honshu) from 3.7°C in January to 26.4°C in August; in Kagoshima (Kyushu) from 6.6°C in January to 27.1°C in August. Centigrade scale is used.

Population

Total population in 1966 was 99 million.

	Male	*Female*
15 to 24	10,074,000	10,005,000
24 to 34	8,406,000	8,449,000
35 and over	11,225,000	12,467,000

Households

In 1966, there were 21.5 million families. The number of private residences was 14.6 million and there were 5.4 million multiple dwellings.

Income

National income in 1966 was Can.$84,347 million; per capita income Can.$853. The average monthly wage was Can.$118 in 1965.

Bank Accounts

79 million bank accounts in 1966.

Retail Sales

In 1966, Can.$25,087 million; per capita Can.$253.

Motor Vehicles

In June 1967 there were 3,237,300 passenger cars, 5,791,800 commercial vehicles, and 783,600 motorcycles and scooters.

Telephones

85 per thousand in 1966.

Radio and Television

In June 1967, 2.4 million households had registered radios and 19.5 million registered television receivers and radios. (Many of these households had more than one television receiver; 81.5 per cent of Japanese households had at least one.) Television (525 lines per picture) and radio broadcasting facilities are both publicly and privately owned.

Water Supply

Safe to drink. Pressure varies but 1.5 kg. per square centimetre is the minimum permitted.

Electric Power

50-cycle a.c. to the east, 60-cycle a.c. to the west of a line drawn from Niigata in the north to Shizwoka in the south, single- and three-phase. (German generating equipment was originally used in the east, U.S. equipment in the west.) Power for domestic use is 100 and 200 volts, for small industry 200 volts, and for major industries 3,000 and 60,000 volts. A grounding conductor is not required in the cord attached to an appliance. There are 23.4 million domestic customers, 2.6 million industrial (including family-sized businesses), and 900,000 commercial. The average domestic rate is Can.$0.036 a unit, the average industrial rate Can.-$0.014 a unit. National capacity is 33,000 mw. A ground wire is used in the distribution system in areas where thunderstorms are frequent. Within two years, the distribution voltages will be increased from 3,000 volts to 6,000 and 10,000 volts.

Coal

Production in 1966 was 50.6 million tons; consumption over 67.4 million. Reserves are estimated at 20,246 million tons.

Gas

Manufactured gas production in 1966 was 32,851 billion kilocalories.

Analysis:

C_1	0 to 4 per cent
CH_1	20 to 35 per cent
O_2	1 to 7 per cent
CO_2	0 to 19 per cent

Pressure at domestic meter 40 to 150 mm. water column.

There were 6,989,000 domestic customers and 323,000 commercial customers. In 15 years, the total number of customers has trebled.

Petroleum Products

All refined products available. Production and reserves of crude are negligible.

Weights and Measures

Metric.

Screw Thread

Metric right hand, but unified in the aircraft industry.

Standards

Standards for electrical appliances, oil and gas stoves and furnaces, and general machinery are established by the Japan Industrial Standards Association which also gives approvals. These are not compulsory except for safety measures applying to electrical appliances and heating equipment. Electrical appliances: Public Utilities Bureau, Ministry of International Trade and Industry, 1 3-chome, Kasumigaseki, Chiyoda-ku, Tokyo. Furnaces and stoves: fire station in district where importer resides.

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