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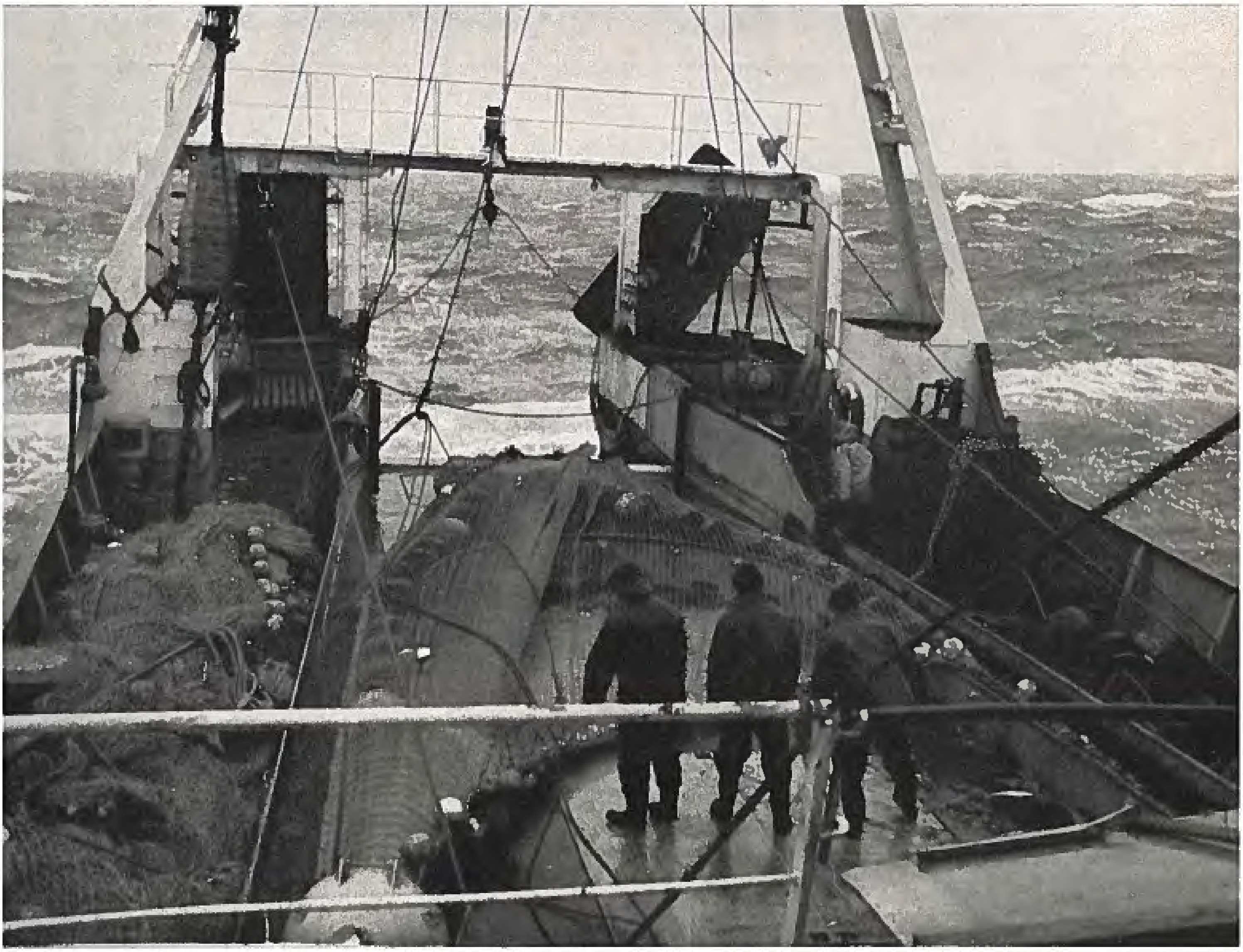
FOREIGN TRADE

DEPARTMENT OF TRADE AND COMMERCE, OTTAWA



Fisheries Exports Are Still Rising

FOREIGN TRADE

MAY 25, 1968 Vol. 129 No. 11

COVER: The aptly named "Acadia Albatross" was one of the first stern trawlers to operate out of Nova Scotia ports. Here her crew hauls in a catch from a stormy-looking sea. Atlantic fishermen landed over two billion pounds last year. For details of their catch and the harvest from the Pacific and inland waters, see the article on page two.

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COMING—EXPORT MARKETS IN EAST AFRICA, JUNE 8 ISSUE

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Fisheries Exports

B.C. salmon are unloaded from a pressure tank aboard the packer ship at Vancouver.

Are Still Rising

Canada earned nearly $236 million from exports of fish products last year, despite many marketing problems. This survey analyzes the types of fish Canadians sold and the markets they reached.

T. R. KINSELLA,
Assistant Director (Fisheries), Agriculture and Fisheries Branch.

■ Exports of Canadian fisheries products during 1967 had a value of $235.5 million, an all-time high, 7.5 per cent over the previous record of $219.1 million set in 1966. Canada thus came second only to Japan among the world's leading fish exporters in terms of value. Shipments went to 77 countries. Prominent were dried salted groundfish and canned fish (particularly canned salmon and sardines). The value of over-all shipments of canned fish and shellfish reached $42.9 million as against $28.5 million in 1966.

The position of the Canadian fisheries industry at the outset of 1967 was precarious. Prices generally for most frozen fisheries products in the important U.S. market declined during the fall of 1966 because of the termination of the Roman Catholic traditional laws of abstinence and increased output in Europe.

However, over-all stocks of frozen fish and shellfish in both Canada and the United States tended to lessen during the first part of 1967 and c.i.f. prices to wholesalers in Boston, Massachusetts, especially for frozen cod blocks, eventually increased from a low of 19 to 20 cents per pound to 25 to 26 cents per pound during the late fall. There was an air of cautious optimism in the industry that the trade had weathered possibly the most serious storm in its history. Exporters were stressing quality and two relatively new products, in addition to individually frozen boneless groundfish fillets (cod and related species), were reaching the market. Atlantic Queen crab and Atlantic shrimp were produced fresh and frozen and met a ready demand.

An innovation in 1967 was the export of frozen pink salmon to European and other outlets. The restriction on these exports implemented in 1948 was relaxed in August 1967 and a fairly large volume entered export trade. Though the 1967 canned salmon pack was lower than in the previous year, the largest sockeye output since 1958 was processed: some 559,000 cases compared with 407,000 in 1966. With the exceptionally small Alaska production of sockeye salmon in 1967, there was a keen demand in all traditional markets for the Canadian product.

The trade welcomed the progress made by the Department in the Kennedy Round of tariff negotiations in eliminating duties on numerous fisheries products in the United States and reducing tariffs on a significant number in both the United States and Europe. This was tempered by the devaluation of currencies in several traditional markets, including Britain and the Caribbean area. In addition, lower quotations for frozen fish by Britain and Denmark in the Australian and U.S. markets had a dampening effect on the previously improved position. Iceland, our major competitor in frozen fish, also took steps to devalue its currency and this gave the trade considerable concern as 1967 came to a close.

Frozen Fish

The Soviet fisheries catch and the fisheries trade between the U.S.S.R. and Iceland have a bearing on the world market for frozen fish. Total catch by the Soviet fishing fleet in 1967 has been reported at 6.5 million metric tons compared with 6 million in 1966 and 5.7 million in 1965. The Soviet Ministry of Fisheries recently predicted that the total Soviet catch by 1970 will reach 8.7 million metric tons. The Iceland-Soviet Trade Agreement for 1968 calls for the delivery of 12,000 to 15,000 tons of frozen fish fillets, 5,000 tons of whole fish, and 5,000 tons of herring. It is understood that in 1967 Iceland delivered to the U.S.S.R. 15,900 tons of frozen fillets, 5,500 tons of whole frozen fish, 3,900 tons of frozen herring, and 2,600 tons of salt herring. The 1968 protocol should tend to strengthen the world market demand for frozen fish in the ensuing year.

The United States is by far Canada's leading customer for frozen fish.

Production in Brief

- In 1967, the Canadian catch of seafish and shellfish reached 2.37 billion pounds, a 5.5 per cent drop from 1966.
- Landed value of the catch was $149.7 million, 5.8 per cent below the $159 million of 1966.
- Marketed value reached $300 million.

Atlantic Fisheries

The Atlantic catch of 2.05 billion pounds was worth $96.98 million—up in quantity and in value ($96.31 million in 1966).

Larger catches of cusk, turbot, eels, herring, salmon, swordfish, clams, squid, and seaweeds. Landings of herring alone reached 764 million pounds, up nearly 39 per cent over 1966.

Smaller catches of catfish, cod, flounder and sole, haddock, hake, halibut, pollock, redfish, alewives, capelin, mackerel, smelts, lobsters, oysters, and scallops.

Lobsters led in value at $23.3 million for 35.1 million pounds ($22.0 million for 37.3 million pounds in 1966).

Cod fishery ranked second in value at $23.08 million for 521 million pounds ($25.09 million and 563 million pounds in 1966). Newfoundland's catch was 321 million.

Pacific Fisheries

Pacific fishermen landed 319.9 million pounds in 1967, down 44.3 per cent from 1966.

Salmon catch dropped 20.2 per cent—from 162.9 million pounds in 1966 to 129.9 million in 1967. All varieties of salmon declined with the exception of sockeye, which was up some 10.6 million.

Herring catch at 110.8 million pounds was down 63.9 per cent.

Halibut catch was 25.1 million pounds worth $6.4 million, compared with 32 million pounds valued at $11.5 million in 1966.

Groundfish landings, including gray cod, flounder and sole, lingcod, and sablefish, were down in quantity and value from the 1966 catch.

Inland Fisheries

In 1966, catch of 120 million pounds was worth $15 million (119.2 million in 1965, about $15 million).

Ontario was the leading producer, followed by Manitoba, Saskatchewan, Alberta, Northwest Territories, Quebec, and New Brunswick.

The main species caught were whitefish, yellow pickerel, perch, pike, sauger, trout, and smelt.

Fresh and Frozen Ocean Perch and Groundfish Fillets and Blocks (cod and related species)—Imports of these from all sources into the U.S. during 1967 amounted to 283.6 million pounds, down 10 per cent from the record 315.1 million of 1966. Canadian exporters furnished 169.2 million pounds (180 million in 1966 and 177.7 million in 1965). According to preliminary statistics, Canada was the leading supplier of fresh or frozen cod fillets, providing 21.5 million pounds of the 32.1 million that the U.S. imported. Iceland was the other major supplier with 8.1 million pounds, as against 10 million in 1966. Denmark and Norway followed.

against 25.5 million pounds ($18.6 million). Canned pink salmon led the other species in quantity and value, followed by sockeye, coho, and chum. The principal market for Canadian canned salmon was Britain. Other important outlets include Belgium, Australia, the Netherlands, France, Italy, Ireland, New Zealand, South Africa, Singapore, Trinidad, Jamaica, Venezuela, Netherlands Antilles, and French Oceania. There are no restrictions on imports of canned fish into Australia but shipments into New Zealand are under global licence. There has been no change in South Africa, where a quota system governs imports of canned fish.

Canned Sardines—The pack in 1967 totalled only 842,870 cases (20 pounds) compared with 1,192,340 in the previous year. However, there was a strong demand in traditional markets, including some 40 countries, and this led to the all-time record high exports in quantity and value. The main outlets were Jamaica, the United States, Australia, Dominican Republic, Guyana, Barbados, Britain, Trinidad, South Africa, Austria, New Zealand, Fiji, Surinam, Netherlands Antilles, and Panama.

Other Canned Fish and Shellfish—Canada also exported in 1967 herring, kippered snacks, chicken haddie or flaked fish, lobster, crab, mackerel, and clams.

Molluscs and Crustaceons

Exports of molluscs and crustaceans during 1967 were lower in volume but higher in value. Shipments to foreign markets reached 37.7 million pounds ($35.8 million) in comparison with 41 million ($34.5 million) in 1966.

Lobster—Shipments of lobster in the shell, fresh or frozen, during 1967 were valued at $15.3 million as against $15.2 million in the previous year. The United States was the major market. However, the increasing demand accounted for important quantities being exported to France, Belgium, the Netherlands, and West Germany. Shipments of lobster meat, fresh or frozen, went chiefly to the U.S., and Britain purchased a considerable amount. Token lots went to Switzerland, Sweden, and Belgium.

Exports of canned lobster in 1967 were worth $1.9 million, down from the 1966 figure of $2.6 million, mainly because of smaller landings in 1967. The United States, Britain, West Germany, Sweden, and Belgium were the principal outlets.

Scallops—The Canadian catch of scallops in 1967 was the lowest since 1961. Only 13.3 million pounds ($7.8 million) were taken compared with 18.3 million pounds ($7.4 million) in 1966, apparently because of the continuing decline in sea scallops on the Atlantic Coast. With the smaller landings in traditional areas, many of the scallop vessels turned to other Atlantic fisheries, including swordfish and halibut.

Exports of fresh or frozen scallops during 1967 reached 13.7 million pounds ($9.5 million) compared with 17.4 million ($8.8 million) in 1966. The major market was the United States with France second. Limited quantities went to ten lesser outlets, including the Netherlands, Bermuda, Denmark, and West Germany.

Catches of Atlantic clams and squid were higher and the output of oysters, down considerably in quantity, was higher in landed value. Pacific Coast output of clams and crabs was up but oysters and shrimps were down.

Fisheries Byproducts

The Pacific herring catch continued its severe decline in 1967. A record low of only 58,408 tons were harvested in 1967 worth only $1.8 million as against 153,826 tons ($5.1 million) in the previous year. The scarcity of the species resulted in the Government's closing of herring areas during 1967.

The West Coast herring meal output reached 9,678 tons (27,181 tons in 1966). Production of herring oil in the Pacific area during 1967 amounted to 837,900 gallons in comparison with 3.1 million gallons.

Landings of Atlantic herring reached 381,860 tons ($8.2 million) compared with 284,945 tons ($6.2 million) in 1966. Herring meal put up in the Atlantic provinces totalled 48,843 tons (25,881 tons) and herring oil 4.3 million gallons (1.7 million in 1966).

Groundfish meal (cod and related species) processed in 1967 totalled 38,156 tons (41,394 in 1966). Exports of herring meal from both coasts amounted to 74.7 million pounds ($5.9 million) up from 73.4 million ($6.9 million) in 1966. The United States and Britain were the only export markets and the bulk was sold in the U.S. A considerable quantity was sold on the Canadian domestic market. The major share of the exports of herring oil went to Britain.

Promoting Fish Soles

A Fisheries Reconnaissance Mission travelled to Eastern Europe in February 1967 and investigated markets for fisheries products in Austria, Czechoslovakia, Romania, Hungary, and Yugoslavia. Later in the year an incoming mission from Czechoslovakia toured the fisheries of Eastern Canada. As a special service to the industry, the Department of Trade and Commerce, in co-operation with the Department of Fisheries and the Fisheries Council of Canada, has sent Fisheries Missions to all of the leading fish-producing and consuming countries of the world during the past several years.

In co-operation with the Department of Fisheries and the Fisheries Research Board of Canada, Trade and Commerce will sponsor a fisheries display at the American Commercial Fish Exposition (Fish Expo) in Boston in October (see page 10). Sample products of packers across Canada will be exhibited. The Commercial Products Division of Atomic Energy of Canada Limited will also participate, featuring techniques employed in the study of fish irradiation using gamma energy from Cobalt 60.

Outlook Is Good

A recent survey across the United States of processors, chain stores and institutional outlets indicated a general increase in sales of fish and shellfish in 1968. Canadian exporters have two major advantages over their competitors in this, the world's largest market for fisheries products. They are right on the doorstep of the U.S. and the Canadian fisheries inspection service is second to none. This augurs well for the future, because the United States Congress is now considering fish inspection legislation which will apply to both domestic and imported products.

Marketing Opportunities for Canadian Fish

Michigan

Good market for freshwater fish

■ Detroit, because of its strategic location in the center of the Great Lakes area and close to the Canadian border, is one of the busiest U.S. ports of entry for imported fish products, with Canada as the biggest foreign supplier. This geographical factor alone explains the presence in Detroit of large fish distributors whose operations extend to numerous central and northern states. In 1967, the Customs District of Detroit registered imports of 237.3 million pounds of fish products in all forms (fresh, frozen, fillet, canned, cured, etc.) coming from Canada. The table shows the top five species of fish imported from Canada last year.

Major Fish Imports from Canada Entering the Detroit Customs District, 1967

Species and Form	*Quantity (pounds '000)*
Yellow Perch	
Fillet, frozen	36.7t2
Fillet. fresh	24.635
Whole. fresh	15.102
Whole. frozen	1.897
Smelts	
Whole frozen	27.846
Whole fresh	16.60t
Cod	
Fillet. frozen	t7.992
Fillet. fresh	t.094
Haddock	
Fillet. frozen	13.058
Fillet. fresh	476
Ocean Perch	
Fillet. frozen	12.913

Source: Bureau of Commercial Fisheries, U.S. Department of the Interior, Ann Arbor, Michigan.

Fresh Fish—The market for fresh fish is expanding as rapidly as the market for frozen, although it is still much smaller in size. The U.S. Bureau of Commercial Fisheries has been promoting fresh fish in recent years through a public education program. To a certain extent, the success of this program has been aided by air freight, which brings in fresh fish more rapidly. In 1967, the U.S. Bureau of Commercial Fisheries estimated that roughly three million pounds of fresh fish from the Northwest States (Seattle) were moved by air to the Chicago-Milwaukee area at a cost of eight cents per pound. No significant air movement from the eastern seaboard to the Detroit-Chicago area has been recorded, possibly because of the relatively short distance. Air shipment from Alaska is also becoming popular. Fresh fish shipped by air are ice-packed in containers ranging in size from 30 to 150 pounds. However, some air freighters still have difficulty in finding a totally leak-proof container.

The bulk of the shipments from Canada and other parts of the U.S. move by truck. Frozen fish is usually packed in 50-pound cardboard cartons; fresh fish, with the exception of cod which is shipped in 120-140 pound boxes, is usually packed with ice in 60-pound wooden boxes.

Freshwater Fish—The U.S. Bureau of Commercial Fisheries estimates that the individual consumer in Michigan eats approximately nine pounds of fish products per year, versus 10.6 pounds for the average American. With a population of 8.5 million, Michigan accounts roughly for 76.5 million pounds of total U.S. fish consumption.

The two leading species of freshwater fish shipped to the local fish distributors are yellow perch (fresh and frozen) and smelts (fresh and frozen). Michigan and the North Central States generally are a natural market for freshwater fish from the Great Lakes, Manitoba, Saskatchewan, Alberta and Ontario. Freshwater fish represents roughly 65 to 75 per cent of Michigan fish consumption. Other countries exporting fish products to this area are South Africa (lobster tail), Japan (canned tuna and oysters), Norway (canned sardines), Holland (canned herring).

Fish importers in Detroit are very receptive to offers on all varieties of fish and are constantly looking for new sources. They are aware that the 1968 fish production outlook in the U.S. is not too encouraging, with a significant slowdown predicted for haddock, cod, pollock, flounder, and Gulf of Mexico shrimp. Therefore the U.S. will continue to rely on outside sources for a large portion of the requirements. Any Canadian fish exporters interested in contacting local distributors should request the Canadian Consulate in Detroit to arrange the necessary introductions.

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

New York

Excellent demand for lobster, at rising prices

■ The number of lobster traps set in New England has risen substantially in the last 15 years but the catch has not improved proportionately in this prime producing area. The average catch per trap dropped from 45 pounds in the early 1950's to about 30 pounds in 1965 and 1966 in the New England area. The number of fishermen has also dropped during this same period. The United States Bureau of Commercial Fisheries estimates that the New England lobsterman of today is working two to three times the number of traps he worked a decade ago.

The over-all United States catch of lobsters declined only moderately in 1966 to 29.9 million pounds, but the drop in 1967 totalled some five million pounds. In Canada too production has been declining over the last several years, although the 1967 decrease was not as drastic as in the U.S. Shrinking production in Canada has been reflected in smaller exports which have dropped consistently since 1962. In fact, U.S. imports during 1967 of northern lobster and lobster meat, of which Canada is the sole supplier, at 15.6 million pounds, were the lowest in years. In 1955, for example, they reached 23 million pounds and in 1962, 22.1 million.

At least part of the decline in the lobster catch in the most important producing areas off Maine is attributed to a persistent lowering of the sea water temperatures in that area. The peak catch of 24.4 million pounds occurred in 1957 when the water temperature averaged 48 degrees F. Since then, a direct relation has been demonstrated between falling water temperatures (averaging about 3.5 degrees F a year) and the annual lowering of the Maine lobster catch, which in 1967 reached only 16.1 million pounds.

You can still buy a lobster in New York's famous Fulton fish market—and many New Yorkers can afford it. Prices have skyrocketed as U.S. and Canadian catches decline, but the demand is still great and the market will take all we can supply.

With rising population and incomes, smaller supplies of lobster have forced prices up so that today lobster is truly a gourmet food. The New Yorker dining out expects to pay about $7.00 for a lobster dinner in a modest restaurant and considerably more in a better establishment. Even at these inflated prices, restaurateurs claim that they are losing money on lobsters. Since lobsters of the popular 1¼-pound size sold at wholesale in New York for $1.85 a pound in March 1968, this statement is not surprising. Unfortunately for both the restaurant operator and his customers, there is little long-term prospect of lower prices.

The United States has always been the largest single customer for Canadian lobsters and this situation should continue. Because of the difficulties which the domestic lobster industry is facing, this market will absorb as much lobster as Canada can supply, and prices paid to shippers will probably be higher than ever before.

—D. L. RUSSELL,
Commercial Officer, New York.

Los Angeles

Frozen fish, especially Greenland halibut

■ The highlight of Canadian frozen fish sales in the Los Angeles area in recent years has been the great increase in shipments of Greenland halibut or turbot. Last year sales of this species totalled well over five million pounds and should continue to rise this year, even with an increase in the price at wholesale from an average of 22 cents a pound in 1967 to 30 cents in 1968.

Fillets of Greenland halibut are primarily a retail commodity. These fillets are sold to chain stores either directly or through brokers in either the standard one-pound package or in packs of 10 to 16 pounds. The one-pound package is retailed frozen but the larger packages are thawed in the store and sold at the fresh meat counter.

Quality and relatively low pricing have undoubtedly been the decisive factors in the success of Greenland halibut here. It appeals to the consumer because of its attractive appearance and it is priced competitively with poultry, the main competition. Chain stores are reluctant to price fish promotionally as they do poultry but insist on a 25 to 30 per cent markup; this differentiates the Los Angeles market from those in the East. So far this year, sales are about 5 per cent ahead of last year.

Cod and haddock also sell steadily in the Los Angeles area; quality being equal, price is the main factor in the block market. Iceland, our major rival, has dominated this market for years with its excellent quality, bone-free product. Introduced about 15 years ago at very low prices, the Icelandic products now command a price premium over Canadian and U.S. fillets in California. They also dominate fish menus included in the local school lunch program, in spite of the "Buy American" provisions of California State legislation. With intelligent planning and patience, Canadian suppliers of quality fish could participate in this big institutional market.

Most Canadian frozen fish selling in the Los Angeles area is of types on which import duties are low. To date this office has not observed any noticeable change in patterns of supply or competitive factors because of the tariff reductions negotiated in the Kennedy Round. Sales opportunities for former high-tariff items such as cooked frozen scallops should develop over the next year or two as these duties are reduced.

The Los Angeles market offers great potential for suppliers of Canadian fishery products. A rapidly expanding population, high incomes, and the above average consumption of fresh and frozen fish should mean a rise in over-all demand of some 20 per cent over the next ten years to reach a total of some 200 million pounds a year. We recommend to Canadian fish producers that they establish direct contacts with brokers in Los Angeles and develop a close working relationship with them in order to share in this rapidly growing market.

—J. H. SUGGITT,
Consul and Assistant Trade Commissioner, Los Angeles.

John Suggitt (second from left), author of this article, visits a special display of Canadian halibut at Crawford's Market Valley Boulevard store in Alhambra. With him (left to right) are Frank Van Dongan and Mel Lurau, manager and assistant manager, fish department, and A. R. Lantz, president of A. R. Lantz Co. Inc., fish brokers in Los Angeles.

New England

Imports needed to supply demand

■ New England food fish landings in 1967 totalled 354 million pounds, down 78 million from the 432 million landed in 1966. Industrial fish landings were 73.7 million pounds compared with 77.2 million in 1966.

From December 1966 to August 1967, landings of sea scallops, flounder, scrod, haddock, cod, perch and whiting declined 23 per cent compared with the same period a year ago. This produced a 16 per cent fall in revenue for the industry. Rough weather and a seasonal scarcity of fish in the Northwest Atlantic were the reasons for the decrease in landings.

In spite of this decline in domestic landings, imports did not increase as expected.

The reduced U.S. tariff quota on fresh and frozen groundfish (cod, haddock, hake, pollock, cusk and ocean perch) fillets and steaks for calendar year 1968 is 24,894,000 pounds, up slightly from 24,883,313 pounds in 1967. This means that 6,223,725 pounds of groundfish fillets and steaks may be imported each quarter at the 1⅞ cents per pound rate of duty. Any imports over the quarterly quota will be dutiable at the rate of 2½ cents per pound.

United States concessions granted during the Kennedy Round reduced the rate of duty on fish blocks (with bits and pieces) from 1 cent to 0.8 cents per pound on January 1, 1968, with further reductions in five equal annual stages until January 1, 1972, when fish blocks will be duty free.

The New England production picture for 1968 is not encouraging. The quantities of groundfish (i.e., haddock, cod, pollock, and flounder) available off the New England coast are down. Imports will continue to be the major source of edible fisheries products in 1968, providing more than half of the available supplies. Prices should show a slow rise.

The market for imports of all fisheries products into New England continues to be excellent, because the gap between domestic production and consumption must inevitably be filled by foreign suppliers. There are, however, continuing attempts to impose import quotas and tighten laws on dumping. The most recent incident of some concern to Canadian exporters was the complaint made to the U.S. Bureau of Customs that Eastern Canadian suppliers are selling frozen cod fillets in New England at less than "home market" value. Customs officers have been directed to withhold appraisal of cod fillets pending a determination on whether this merchandise is being sold at less than fair market value.

—BELDEN D. DAVIS,
Commercial Officer, Boston.

Fish Exposition - - Boston '68

■ International attention will be focused on the commercial fishing industry during a four-day fish exposition in Boston this year. Officials of the American Commercial Fish Exposition recently announced that Boston's War Memorial Auditorium will be the site for its second annual Exposition, October 16 to 19, 1968.

Open to the trade only, the show provides a forum for all segments of the industry. There buyers and manufacturers can meet to discuss the latest advances in fish processing, fishing technology, and the supplying of fish to consumers throughout the world.

The first Exposition, held in 1967, proved an outstanding success for the 200 exhibitors and 17,000 visitors. This year some 400 exhibitors are expected. Services and products ranging from boat-building to seafoods, engines, fishing gear, refrigeration, and electronics will be exhibited and educational, scientific and administrative institutions will be represented.

Discussions on modern fishing technology, vessel designing, electronic developments, and processing methods are scheduled for the seminar. Last year's speakers included United States Secretary of the Interior, Stewart Udall, Senator Warren Magnuson, and Senator Edward M. Kennedy. Key speaker at the Canadian festivities was Gordon O'Brien, Manager, Fisheries Council of Canada.

The Canadian Government will again mount an exhibit, in co-operation with a number of firms producing various fisheries products and gear for use by the industry.

October 17 has been designated as "Canada Day". Arrangements have been made for a dinner at which representatives of Canadian fishing firms can meet fish brokers, processors, and equipment manufacturers from the United States and other countries. Canada will also act as host at a reception given for visiting Canadian fishermen and government officials where they can meet U.S. and international buyers and manufacturers.

During last year's Exposition a fish-tasting reception for food editors of leading U.S. magazines was held at the Canadian Consulate and several methods of preparing the numerous fish and seafoods available from Canada were demonstrated.

Two large contracts for fishing equipment, totalling some $1.5 million, were awarded to Canadian firms as a result of their participation in the 1967 exhibition. Fish from Canada has also been arriving in larger quantities for the Boston processors and distributors. Boston retains its position as the largest fish distribution center in the U.S.

For additional information about the Exposition, contact the Consul and Trade Commissioner, Canadian Consulate General, 500 Boylston Street, Boston, Massachusetts 02116.

—R. C. ANDERSON, *Consul and Trade Commissioner, Boston.*

Eastern Caribbean

Market good, sales volume may fall slightly

■ Devaluation has affected sales of Canadian fish to the Eastern Caribbean countries to some extent, exports continue strong, and Canada still holds the major share of these markets. It is against this background that we must consider the current and future prospects in this area.

Salted fish, bloaters, canned sardines and canned salmon are the major fish products sold to these markets. Devaluation of all Commonwealth Caribbean currencies has made our products more costly and this—coupled with worsening business conditions, increasing unemployment and tax increases in Trinidad—has caused a slight drop in the volume of our exports to these markets. There is also a decrease in imports into Trinidad and Tobago of the higher-priced extra large salted cod in favor of the lower-priced small choice cod.

Salted Fish—The price for Norwegian salted cusk (which provides the chief competition to our salted fish) is being held at the pre-devaluation level of 260/- sterling (Cdn.$39.26) c.i.f. per 100-pound bale of 31 to 45 tails, but this price was considered high in pre-devaluation days and Canada, despite devaluation of local currencies, has been able to meet the competition.

Ling and salted cod from Britain are not serious threats, except where post-devaluation price controls have forced buyers to seek the lowest priced source. Buyers prefer our salted fish, which they consider of higher quality and better texture. Furthermore, the price of English cod has increased since devaluation and is currently being quoted at 225/-($31.50) c.i.f. per 100-pound bale. Also, our changeover to a 50-pound carton in place of the 100-pound box is more convenient for the local merchants.

Bloaters—Norway and Britain are our main competitors in bloaters. Since devaluation, Norwegian prices have been increased to 25/6d ($3.51) c.i.f. per box of 18 pounds for 80 count, up from 21/9d ($3.02), and British prices also increased by 6d to the present 17/4d ($2.42) per 14-pound box c.i.f. We are successfully meeting this competition. Buyers state that our supplies are more regular and we are continuing to enjoy the major share of this business.

Canned Sardines—Canadian canned sardines continue to enjoy a virtual monopoly in these markets. In Trinidad, the retail price of the 3¼-ounce tin, which has been controlled since devaluation, has been increased from 16 to 19 cents (and is in fact selling at the maximum). There have been similar proportionate retail price increases in some of the other Eastern Caribbean territories since devaluation. In Guyana, however, price controls on basic foods in the post-devaluation period tend to emphasize lowest prices paid and it would appear that these stringent controls are causing at least temporary disruption of our trade, particularly in salted fish and sardines.

Canned Salmon—Canadian canned salmon also continues to enjoy the greatest share (over 80 per cent) of these markets, despite devaluation. The United States and Australia are our main competitors.

Outlook—The long-term outlook in the major markets may be clouded by the general emphasis which the Government is placing on local production of foodstuffs, including salted fish. Curing and salting of local fish on a commercial scale are still a few years away, but at least two Trinidad firms have indicated interest in establishing curing plants. One Guyanese firm is already producing salted fish in small quantities. The Caribbean Free Trade Area (CARIFTA) which now seems to be approaching reality (it was officially expected to come into force on May 1), would offer a larger market to local producers and might therefore speed up plans to process fish locally.

In the short term, however, the outlook for our fisheries products is good. We are continuing to retain our share of these markets although a slight decrease in volume, because of higher costs as a result of devaluation and lower spending power of the local economies, may be expected.

—JOHN A. AHOW,
Commercial Officer, Port-of-Spain.

Examining shipments of Canadian salted cod and cusk in a Port-of-Spain warehouse are (left) John A. Ahow, Commercial Officer, aod K. Govla, local agent for NAFEL.

Dominican Republic
Puerto Rico
Haiti

Herring bloaters, dried salt fish

■ The Dominican Republic, with its underdeveloped economy, presents a market chiefly for the less expensive types of Canadian fish, such as herring bloaters, dried salted pollock and hake, and canned sardines. In addition, because Norway is capable of supplying competitive types of cured fish, offering prices are most important.

A foreign exchange shortage currently running in the vicinity of U.S.$15 million a year brought the Government to a decision to impose a quota system last July on a wide range of products, including fish. These quotas were extended for another six months at the beginning of 1968 and there is no indication that they will not be extended again at mid-year.

Fortunately for Canadian fish exporters, a law was also passed which permitted importers with foreign exchange outside the country to use this for ex-quota imports.

Following, in cwt. (with 1966 figures in brackets) are our main 1967 fish exports to the Dominican Republic: herring bloaters 31,167 (73,544); dried salted pollock 7,766 (16,262); dried salted hake 11,987 (18,291); canned sardines 15,570 (19,137); cod, boneless salted 738 (1,166); cod, heavy salted 309 (3,496).

Norway supplied herring bloaters 3,306 cwt. (4,419), dried salted saithe 79,050 (102,133).

Spain supplied in 1967 some 12,063 cwt. of cod and pollock.

There appear to be two main reasons for the inroads Norwegian fish have made into this market since about 1960. First, Canadian prices have been increasing faster and second, there are frequent shortages of Canadian supplies. The March 1968 price of Norwegian dried salted fish was $23.50 c.i.f., compared with $24.00 f.o.b. (approximately $25.90 c.i.f.) for Canadian. Bloater prices were Norwegian $2.60 c.i.f.; Canadian $2.50 f.o.b., $3.00 c.i.f. per 18-pound case.

Puerto Rico—As personal incomes continue to rise—they passed an average of more than $1,000 last year—Canadian cured fish products become less essential in the diet and are used more as ingredients for traditional dishes. Total demand remains relatively stable and the more expensive types of cures can be sold here.

Competitors are well aware of this lucrative market and in 1967 Spain is reported to have shipped in 107,440 cases (of 50 pounds each) of dried salted codfish and France 36,815. France also supplied 37,688—100 pound cases, Spain 2,933 and Norway 1,329.

Since December 1967, the market has been overstocked and early 1968 sales slow. Canadian offering prices were somewhat lower than in 1967 at $24.50 c.i.f. for small choice codfish heavy salted, $26.50 for medium and $31.00 for large. Spain was offering some small fish at $22.70 c.i.f. for delivery April to June 1968.

In 1967, Canadian fish exports to Puerto Rico were running close to those of 1966. They were (cwt.) cod, heavy salted 61,077; cod, light salted 30,380; pollock, dried salted 10,650; cod, boneless salted 9,593; haddock and cusk, dried salted 2,933; haddock and hake frozen 1,776.

Given competitive prices, the Canadian share of the market should increase in 1968.

Haiti—A critical foreign exchange problem brought on by lower coffee export earnings and internal financial difficulties suggests that Canadian fisheries exports to Haiti will continue to decrease. The declining trend of sales is illustrated in the table.

Consumer demand in this country is based on lower-priced cured fish, including alewives. Even these command high retail prices because of customs duties and other official charges.

FISH EXPORTS FROM CANADA TO HAITI

	1965	*1966*	*1967*
		(in cwt.)	
Herring bloaters	20,824	22,859	15,801
Cod, heavy salted	1,716	1,646	1,554
Haddock and cusk, dried salted	2,993	2,582	1,450
Alewives, pickled	17,863	16,394	11,470
Sardines, canned	767	835	429
Salmon, pink, canned	90	86	137
Mackerel, salted	260	62	—

—W. ADAIR STEWART, *Commercial Secretary, Santo Domingo.*

Jamaica

Canada is still dominant supplier

■ Canadian fish exporters have a long tradition of successful sales to Jamaica, especially salted cod, pickled mackerel and canned fish. Salted cod and ackee (a delicious local fruit) is one of Jamaica's national dishes. Current prospects for expanding sales of Canadian fisheries products to Jamaica are steady but limited by import or price controls. These were designed by the Government mainly to help reduce the growing trade deficit and to curb strong internal inflationary tendencies spurred by devaluation of the Jamaican pound. Canadian fisheries products are competitive, an economical dietary source of protein, and important to Jamaica's continuing growth and development. A steady increase in incomes will likely see medium-cost fisheries products gradually replacing some of the low-cost ones. Fish and fish products from Canada will still be in demand because the bulk of these are sold in the rural area where there is no refrigeration because there is no power.

Nearly all imports of fisheries products into Jamaica are subject to either import quotas or price ceilings. Most orders from Canada are shipped from the east coast by sea, or by truck to New York or Miami and then by sea to Jamaica. In certain special cases, shipments go by air.

During 1967 Jamaica's imports of fish and fish products decreased by 6.2 per cent to 41.8 million pounds, compared with 44.6 million during 1966.

Canada's exports of fish and fish products to Jamaica totalled 30.7 million pounds valued at $8.1 million in 1967, compared with 31.9 million in 1966 also valued at $8.1 million. Despite this decrease, our over-all share of the market by volume increased from 71.4 per cent in 1966 to 73.4 per cent in 1967 and by value from 75 per cent to 75.5 per cent. We remained the dominant supplier.

The demand for fish and fish products during 1967, especially for salted codfish, was fairly strong. Salted codfish imports into Jamaica were 1.5 million pounds greater than the 16.9 million pounds of 1966. This increase resulted from particularly heavy imports in December, when over 2.4 million pounds of salted codfish were imported to take advantage of the Government's short-lived program to subsidize the costs of devaluation.

Total imports of canned fisheries products into Jamaica declined by nearly one million pounds from 1966 to 10 million in 1967 but were still better than one million pounds higher than in 1965. In value the 1967 imports showed virtually no change over 1966.

Canada's share of the canned fish market was approximately 79 per cent in 1967 compared with 84 per cent in 1966 and 81 per cent in 1965. By value imports from Canada were 5.5 per cent lower in 1967 than in 1966 but 16.5 per cent higher than in 1965.

—D. I. DITTO,
Assistant Commercial Secretary,
Kingston.

Brazil

Market for dried cod

■ Brazil imports all the cod it consumes. The market is quite substantial; it was worth U.S.$25.2 million (c.i.f. port of entry) in 1967. Norway is the leading supplier (U.S. $12.2 million), followed by Spain (U.S.$7.3 million), France (U.S.$2.3 million), and the Faroe Islands (U.S.$1.6 million). Canada comes eighth on the list with U.S. $73,000.

In the three years 1965 through 1967, Norway has maintained its market share of about half the total. Spain's sales of cod to Brazil have risen dramatically from U.S.$620,000 in 1965 to U.S.$7.3 million in 1967. France has also made headway—from U.S.$408,000 to U.S. $2.3 million. Denmark, on the other hand, has lost ground—from U.S.$2.1 million to U.S.$791,000.

Southern Brazil prefers large and medium-sized cod with a moisture content of 36 to 37 per cent. Northern Brazil likes the same kind of cure but smaller fish, perhaps because they are cheaper. Large fish must be packed in wooden cases of 58 or 29 kilograms net weight (approximately 130 and 65 pounds). Medium and small fish must be in bales, protected with special paper and wrapped externally with jute—the so-called half bale of 29 kilograms is the most common. Price varies with size. Large fish averaging 12 to 15 to a 58-kilogram case realize U.S.$68 to $70 a case f.o.b. (this size is not frequently available); those averaging 31 to 36 to a case are worth U.S.$60 to $62. Medium and small fish averaging 18 to 22 to a 29-kilogram half bale are worth U.S. $24 to $25, and those averaging 121 to 180 are worth U.S.$18 to $19. Codfish is classified under No. 03-03 in the Brazilian Tariff and enters duty free.

Some of the cod now being imported into Brazil has been through several hands before it arrives and is of poor quality. Canada, once an important supplier, might be able to regain lost ground by selling on quality. Exporters interested in this market should write to the President, Associacão Comercial da Bahia, Caixa Postal 193, Salvador, Bahia, Brazil, quoting their prices c.i.f. Salvador; copies of correspondence should be sent to the Canadian Commercial Counsellor in Rio de Janeiro.

—J. E. LANCASTER,
Commercial Counsellor,
Rio de Janeiro.

Fish, sorted into plastic tubs, await sale at Ostend's Minque (fish auction).

Belgium-Luxembourg

Canned salmon remains the best seller

■ Belgians consumed just over 30 pounds of fish per capita last year, second only to the French among their Common Market neighbors. Of this, 22 pounds came under the "fresh and frozen" category and 8 pounds were "processed". This is not surprising, because the quality and variety of fresh fish is usually good all year round. Consumption of packaged frozen fish was less than three pounds per person in 1967, but signs point to a rapid growth in the market for packaged frozen goods in general in the next few years.

Imports of fish and shellfish into the Belgium-Luxembourg Economic Union (B.L.E.U.) during 1967 (98,903 metric tons) followed a pattern similar to that of previous years with fresh, chilled and frozen accounting for just over 60 per cent of the total, prepared and canned for 26 per cent, and salted, dried or smoked for 14 per cent. European suppliers dominated the market, particularly for fresh and frozen: 63 per cent of B.L.E.U.'s Cdn.$50 million worth of fish imports in 1967 came from other EEC member countries compared with Canada's share of 2½ per cent of the volume* and 6 per cent of total value. The table shows quantities of the more important species imported fresh, chilled or frozen in 1966 and 1967, and the major suppliers of each.

All imports of pickled, dried and smoked (6,263 metric tons of cod, 5,328 of herring and 25 of salmon) were from European sources.

IMPORTS OF FISH INTO B.L.E.U.

Fresh, Chilled or Frozen

Species and Major Suppliers	*Quantity (in metric tons)* 1966	1967
Herring Chilled: Denmark, Netherlands Frozen: Norway, Iceland, U.S.S.R.	9,664.4	9,822.7
Cod Chilled: Denmark, Netherlands	5,241.4	6,061.0
Mackerel Fresh: France, Netherlands, Denmark	1,685.7	1,392.5
Sole Fresh: Netherlands (95 per cent)	902.7	1,139.7
Eels Fresh: Denmark, Netherlands, France	1,109.1	1,151.1
Other fish, including salmon Fresh: Europe, South Africa, Japan	14,249.0	14,427.6
Fillets Fresh: (European)	5,349.6	4,590.9
Shrimp Fresh: Netherlands	748.1	530.4
Crab and crayfish Fresh: U.S. (34 per cent), Japan, U.S.S.R.	32.2	110.0
Lobster Fresh: Netherlands, Britain, Norway, Canada	369.6	351.3

Canned Salmon—Canned salmon has traditionally led the list of Canadian fish exports to Belgium and Luxembourg. Canned pinks have established an excellent reputation here and consumers prefer them, although price is still the largest single factor affecting the housewife's choice. Last year, salmon accounted for 100 per cent of our canned fish and 88 per cent of our total fish sales to B.L.E.U. Volume from year to year is, however, subject to availability in Canada as well as price competition from Japan and the U.S. Our shipments of canned salmon to this market totalled 2,159.5 metric tons in 1967, 33 per cent higher than the year before. The increase in sales appears to have been largely at the expense of Japan, whose exports to B.L.E.U. dropped to 728.6 metric tons from 1,515 in 1966.

Other Salmon—The fact that there is a market here for Atlantic salmon as well was confirmed by a sale of frozen Atlantic grilse salmon from Canada last year. The prospects are promising for Canadian firms who can supply in

* For a total of 2,432.3 metric tons; canned 2,159 tons, and fresh, frozen, chilled, etc. 273 tons.

the six to nine-pound size and keep an eye on the market, with the help of a good Belgian importer.

Freshwater Fish—Canadian sales of frozen freshwater salmon to B.L.E.U. totalled over 230 metric tons in 1967. There is also a small but growing market for frozen pike, perch and other freshwater fish and there should be opportunities for Canadian shippers in spite of the duty-free advantage enjoyed by the other EEC countries.

Fresh chilled or frozen freshwater trout from non-EEC sources pays 9.6 per cent duty now and 16 per cent after July 1, 1968. Other fish will pay 10 per cent, except for eels, which will come in for 5 per cent between October 1 and March 31 each year.

A number of Belgian firms have inquired recently about possible sources of freshwater fish in Canada. If you are interested, write to the Commercial Counsellor in Brussels. Let him know what you have to offer, give c.i.f. Antwerp prices, and he can put you in direct contact with interested buyers here.

Live Lobster—Canadian live lobster has a ready market in B.L.E.U. Trade statistics show most of the imports coming from Holland and Britain, but a large share of these represent transshipments from Canada. One large importer in Ostend brings in as many as five tons at a time for holding in ponds and re-exporting live to Switzerland and other markets in Europe. He has had complaints, however, about the use of wooden pegs in the claws of lobsters from Canada. This practice is prohibited by law in certain countries (including Switzerland) and several shipments have been rejected on arrival there because of the pegged claws, resulting in the loss of valuable orders and, in some cases, expensive claims from buyers. Canadian exporters should keep this in mind and insist on banded claws for any shipments of live lobsters destined for B.L.E.U.

Crabmeat—In Belgium, crabmeat usually means Alaska King from the U.S., the U.S.S.R. and Japan, who have developed a good reputation for consistent quality and, as a result, have the lion's share of the market. With the sharp decline in the catch and continuing strong demand, however, prices for King crab have risen steadily in the past year and this has created some interest in Atlantic Queen crab from Canada. Two packers have brought in sample shipments of canned and frozen Atlantic Queen and both suggested that it had possibilities, but at a substantial price differential. The trade has become accustomed to a high standard of quality for both product and pack with King crab—large solid pieces of meat, with good color, wrapped in paper and preferably packed in 7½- to 7¾-ounce cans (6½ to 7 ounces drained weight). The 3½-ounce size is also acceptable to a limited degree and might be more appropriate for introducing Queen crab as a relatively new product. Frozen crabmeat should be packed in polyvinyl chloride bags in ½, 1 or 5 pound sizes (metric equivalent). Instructions on the packages should appear in at least one of the national languages, French or Flemish.

Frozen Fillets—Packaged sole and cod fillets have been well received and account for a large share of frozen fish sales to date. There is also a strong market developing for frozen fish sticks. Offers of Canadian frozen cod in blocks would be welcomed by at least one of the large processors here who has an automated fish stick operation.

Herring—"Forty-nine ways to serve herrings" may sound more like Stockholm than Brussels, but the count is not far off when it comes to the variety of herring preparations offered on the B.L.E.U. market. Pickled rollmops (with vinegar and onions) are probably the best known, but the popularity of smoked kippers and fillets packed in mayonnaise, tomato and a wide range of other sauces is enough to ensure a strong market for fresh and frozen herring. Holland is by far the largest supplier of fresh and Iceland is a major source of frozen for smoking and filleting. The very small catch last season by both the Belgian and Norwegian fleets could mean an opportunity for other outsiders, including Canada, to make a few sales here in the coming months. Recently, the going price for Icelandic herring, frozen at sea, four to six fish per kilogram, with a fat content of 14 to 16 per cent (a maximum of 18 per cent is acceptable), packed in nine-kilogram paper cartons, was seven B.Fr. per kilogram, or approximately 7 cents Cdn. per pound c.i.f. Antwerp or Bruges.

The Commercial Counsellor in Brussels can supply you with names and addresses of the major processors and fish brokers, who are always interested in receiving competitive offers.

—E. L. GRAY, *Assistant Commercial Secretary, Brussels.*

Britain

Despite devaluation, outlook mainly encouraging

■ In 1967 British imports of fish and fish products from Canada increased 50 per cent over the previous year both in quantity and value, rising to 18,401 long tons valued at £9.9 million. Because the devaluation of the pound affected only the last six weeks of the year, the increased cost in sterling during that period had a comparatively slight effect on the figure.

A comparable increase can hardly be expected in the first full year at the new rate of exchange, but the outlook for Canadian exporters is not altogether discouraging. The British Budget introduced on March 19 did not impose any additional credit restrictions and the Government has made no move to set up import controls. Britain will continue to depend on overseas suppliers of fish which its own industry does not produce or is unable to provide in sufficient quantities.

The reduction in the purchasing power of British consumers which the Budget is designed to bring about will certainly make price an even more important consideration in 1968.

Prices of imported food products have risen since devaluation and the public is becoming reconciled to paying more both for essentials and for luxury products. In some instances, where sizeable stocks are held (canned salmon, for example) the consumer has not yet felt the full effect of devaluation.

The size of the catch in Britain as well as in the supplying countries is an unknown factor which can confuse all calculations. Our prospects in the British market will, as usual, depend to some extent on the quantities which Canadian exporters have to sell.

Canned Fish—Canned salmon is by far our most important fish export to Britain and in 1967 was valued at £6.8 million, over two-thirds of the total. At this time of year, before the size of the pack is known, importers cannot forecast what the demand will be when the inevitable price increase comes into force. None of our main competitors has devalued, so we shall not be at a disadvantage, but our tariff preference of 5 per cent will be reduced to 4 per cent on July 1 as a result of the Kennedy Round. Canned salmon continues to be popular in some regions of Britain and will continue to be bought in preference to other food products if the price rise is not too high proportionately.

Sardines and herring should not be affected by devaluation and if supplies of tuna are forthcoming, they should find a market. Less traditional lines, such as fish chowder, will encounter price resistance.

Frozen Fish—Canada leads all other countries as a supplier of frozen salmon, although the United States is shipping increasingly larger amounts. At the present price (seven shillings a pound c.i.f. for the six- to nine-pound size and just over seven shillings per pound for nine pounds and up), the demand for Canadian frozen salmon, particularly coho for smoking, continues to be strong. Since the Budget, importers have been receiving additional orders which cannot be filled until new supplies come in. The outcome of the local salmon fishery will undoubtedly have some influence on the market, but unless there is a glut in Britain, the bulk of the catch will be sold fresh to the retail trade.

The demand for Pacific halibut should also be maintained but the outlook for other Canadian frozen fish, particularly cod blocks, is difficult to assess. Although Britain's own production of cod increased slightly in 1967, the cost of catching continues to rise and this may help to bring Canadian prices more into line.

Shellfish—Shipments of live lobsters from Canada have to face competition from local production and even in this luxury trade, the Canadian price may be too high for the market to show much improvement. The demand for frozen lobster meat and canned lobster could probably be maintained at present prices.

British importers are looking to Canada as a new source of frozen shrimps, for which there is a growing demand, and they have shown much interest in the Queen crab development in the Maritimes. The question of price, however, will be very significant.

Tariffs and Shipping Procedure—All Canadian fish products enter Britain free of duty under Commonwealth preference, giving our exporters an advantage in some cases. Frozen salmon is, however, free from all sources, and all types of prepared or preserved fish from Britain's EFTA partners are exempt from duty. Canadian exporters of fish products should note that in order to establish a claim to Commonwealth preference, the certificate of origin should bear an endorsement vouching for the Canadian origin of the fish.

—H. G. GARLAND,
Attaché (Fisheries), London.

Greece

Canadians may have opportunities to re-enter this market

■ Greece is a maritime country with a considerable fishing fleet, but the demand for fish still exceeds domestic production. At the present time about 140,000 tons of fish are consumed annually. Of this, a little more than 30,000 tons are imported, including 10,000 tons of wet-salted cod.

Wet-Salted Cod—Salted cod imports from Newfoundland date back to the 19th century, when schooners were used to transport Labrador-style cod, packed in wooden barrels and casks.

Wet-salted style cod was introduced into this country in 1935 by a few Piraeus importers, with supplies coming from France, Iceland and Norway. Since then, and especially after World War II, wet-salted cod has dominated the market and has completely replaced other types.

Greece used to consume about 14,000 tons of salted cod each year but now this has dropped to less than 10,000. The Faroe Islands and Iceland are today the principal supplying countries, followed by Greenland and the U.S.S.R.

The type of cod in demand in Greece is heavy salted, white in color, with a moisture content on arrival of 40 to 42 per cent. It is packed in 50-kilogram net jute bags, except imports from the U.S.S.R. which are packed in wooden boxes. The sizes supplied to this market are as follows, per 50-kilogram container:

1. 40 to 60 tails
2. 60 to 80 tails
3. 80 to 100 tails

Specific quotations are made to Greek buyers for each of these sizes and c.i.f. Piraeus prices range from Cdn.$470 to Cdn.$480 per metric ton.

Greek importers are most anxious to receive supplies of salted cod from Canada. Since World War II token shipments of Canadian wet-salted cod have been made to Greece but results were not encouraging, even though Greek inspectors visited Canada and supervised the selection and packing of the fish. In spite of this, if Canada can supply the type of cure this market wants, Canadian exporters can

—*continued on page 25*

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secure a sizeable share of the Greek market and may in time recapture their traditional position.

Frozen Fish—Before 1966, under a liberalized import regime, frozen fish imports ranged from 2,000 to 8,000 tons a year. However, in April 1966 the Greek Government placed an embargo on frozen fish imports to protect the domestic industry. During the last quarter of 1967 the embargo was relaxed temporarily to the extent that frozen fish fillets could be imported. At the end of March 1968, it was again lifted for an indefinite period and certain frozen fish products are now allowed import subject to licence.

Imports of frozen fish in 1967 are estimated at 3,200 tons, but frozen fillets account for only a small percentage of this total. Denmark and West Germany are the principal suppliers. With the expansion of supermarkets in this country, it is possible that frozen fish and fillet consumption may expand.

Canadian exporters expressed some interest in the Greek market for frozen fish during the period when the embargo was lifted. At that time, however, Canadian prices were too high. In spite of this, Canadian firms should maintain contact with Greece so that they will be ready to step in whenever the opportunity arises. Sales prospects for Canadian fish will then depend on the prevailing international prices. Greek interest in imported fish fillets is mainly in cod, flounder and sole. Ocean perch is of little interest.

Greece is an associated member of the Common Market, with import duties on most fish items from EEC countries 15 per cent lower than on imports from other countries. Basic import duties on frozen fish from EEC countries are 17 per cent ad valorem; duties from non-EEC countries range from 18.2 to 21 per cent ad valorem. Retail prices of frozen fish have been very low for many years, with the average about U.S. $0.40 per kilogram, but these have now advanced to about U.S.$0.50 per kilogram. Frozen fish fillets and headless dressed fish sell at correspondingly higher prices.

—M. B. BURSEY,
Commercial Counsellor, Athens.

France

Good market for gourmet products

■ Canada's exports of fisheries products to France in 1967 were valued at approximately Cdn.$7.5 million. Luxury items made up over 90 per cent of our sales to this market: in order of importance, these were frozen salmon (Cdn.$5.4 million), canned salmon (Cdn.$935,220), pike (Cdn.$339,020), live lobsters (Cdn.$329,340).

Although France is a very competitive market and extremely quality conscious, it should continue to be an important outlet for gourmet products. Canadian exporters are advised to develop sales direct with the many large food chains.

Canadian pike is much appreciated in the French market and sales could increase if sufficient supplies of fish, four to ten pounds in size, dressed, heads on, are available. Frozen grey sole fillets and scallops with roe are also sought after.

There is some demand for frozen eels but Canadian sales are currently made through import houses in Antwerp and Rotterdam. Direct sales would make prices more competitive.

Frozen crabmeat if properly packaged and sold at prices to compete with Alaska crab will also find a ready market in France.

Italy

Dried cod, frozen fillets, salmon (mostly canned)

■ If Canadians want to sell fish to Italy, they should make it cod or salmon. These are the two types that we are already selling in quantity on the Italian market.

Cod—There are two sales possibilities. The first is light salt cures of hard dried cod produced in special areas of the Gaspé peninsula and in Newfoundland. No other kind of salt cod appears to be acceptable here. It is sold mainly in southern Italy, where it is the poor man's dish. In the northern half, where economic progress is much greater, people can afford to pay more for their seafoods. As the southern economy develops, however, the consumption of dried cod goes down.

Because this is a diminishing market, the exporter might give some thought to shipping some of his production to Italy as frozen fillets. These are already being marketed in the north by one of the largest suppliers of fish products. In fact, the possibilities for frozen fish generally, including frozen salmon, are brightening with the phenomenal growth of supermarkets, by far the main outlets in Italy for frozen fish, apart from restaurants.

Imports of dried cod from EEC countries enter free of duty; shipments from other countries pay 7.8 per cent duty. All cod imports are subject to a turnover tax of 2.5 per cent and an administrative fee of 0.5 per cent. For the calendar year 1968, however, dried cod may enter Italy from third countries free up to a quota of 34,000 metric tons. Current wholesale prices at Milan at the end of March were for stockfish Cdn.$1.45 per 1.65 kilograms and for dried cod, light salt cure, Cdn.$0.61 for 0.63 kilograms. On frozen cod fillets, the duty for EEC countries is 4.5 per cent and for other countries 15.3 per cent, and there are no other levies.

Salmon—The greater part of the Canadian salmon going into Italy is canned; 541 metric tons of canned salmon were shipped to Italy in 1967 compared with 30 tons in other forms. Again, as the number of supermarkets

CODFISH IMPORTS INTO ITALY

	1964	*1965*	*1966*	*1967*
		Quantity (*metric tons*)		
EEC countries	11,184	10,338	10,580	—
of which				
France	5,365	4,990	5,1tt	5,50t
Germany	5,802	5,324	5,420	4,446
Iceland	5,456	8,234	5,767	1,983
Norway	5,547	9,073	6,578	6,115
Denmark	16,586	10,252	11,665	11,996
Spain	928	42	209	—
U.S.S.R.	50	1,209	1,637	—
Canada	577	652	1,174	391*
Total	**40,851**	**40,050**	**37,856**	**32,945**

* 9 month figure

SALMON IMPORTS INTO ITALY

	1964	*1965*	*1966*	*1967*
		Quantity (*metric tons*)		
Canada	661.8	489.4	395.8	54t*
Japan	105.3	123.3	183.2	—
U.S.S.R.	262.8	242.4	303.6	—
EEC countries	15.4	11.9	35.2	—
Other countries	53.1	108.7	72.8	—
Total	**1,098.4**	**975.7**	**992.6**	**880**

* Thirty metric tons not canned

increases, frozen salmon will probably account for a much larger part of our fish sales. These fish should be sold with heads on and eviscerated, in the 10- to 13-pound range. This demand for salmon with heads on will probably drop as more of the imported salmon finds its way to supermarkets.

There is a 10 per cent duty on frozen salmon from Canada intended for direct consumption.

Freshwater Fish—Freshwater fish from Canada has had little success in Italy. Pike does not suit Italian tastes; Italians themselves produce a good deal of trout and some Canadian species are unknown to consumers. Most trout imports come from Denmark, which supplies small-sized fish, suitable for individual portions.

Eels could find buyers here if they could be delivered live to the wholesaler. At present they come in from France, Spain and Greece.

It has proved difficult to interest the leading importers in offers of freshwater fish from Canada. They buy mainly trout, whitefish, and eels. Over one third of these imports now come from Yugoslavia.

If you want to try out the Italian market for fish, don't just write to us asking for a list of all importers of fish. (They are mainly in the north, in the Genoa and Milan areas.) Tell us what you have for sale, give us some idea of your prices. When you are in contact with an Italian firm, quote prices c.i.f. Genoa or Naples, depending on the destination of your product. And be certain that you ship through a firm that can deliver your fish in good condition. Direct your inquiries to the Canadian Consulate General, Via Vittor Pisani 19, Milan. We will then supply you with the information you need and advise you about possibilities.

—B. M. WHITE,
Vice-Consul and Assistant Trade Commissioner, Milan.

Portugal

Demand good for quality salt cod

■ Portugal is one of the largest consumers of salt codfish in Europe and a traditional market for this product from Eastern Canada, particularly Newfoundland. For many decades the "White Fleet" has been a familiar sight entering St. John's, Nfld., for supplies. Although the sailing vessels are disappearing in favor of modern trawlers, Portuguese fishermen continue to harvest cod at the Grand Banks and the 1967 catch of approximately 231,000 metric tons was a record.

Despite a record national production, imports of salted cod, at an estimated 32,160 metric tons, were higher than in 1966. Relaxation of government controls on imports in July 1967 resulted in heavy imports during the last half of the year. Consequently, because there was no increase in consumption, the carryover from 1967 to 1968 was 45,000 tons, equivalent to seven months' consumption.

Because of these heavy stocks at the beginning of the year, the Portuguese market will likely be slow for some months. However, there are excellent prospects for the sale of considerable quantities of salt codfish from the 1968 production.

Portugal is a quality-conscious market and the need to supply the grades and cures required by Portuguese consumers cannot be overemphasized. Only by doing this can Canadians continue to find an outlet in this very important market.

Sweden

Salmon, lobster, shrimps and mink food

■ Sweden's standard of living is about the same as Canada's but per capita consumption of fish there is 38.6 pounds compared with 14.9 pounds in Canada. Recently, a well-publicized investigation which revealed the presence of mercury in a small proportion (less than one per cent) of Sweden's lakes has created consumer resistance to freshwater fish. These three factors—high standard of living, high fish consumption, and buyers' resistance to freshwater fish—have led to an increasing demand for more expensive types of seafood, particularly shellfish and salmon. Canadian exporters who have taken the trouble to cater to the Swedish taste (rather than simply offering what they think Swedes should like) have been very successful.

Shrimps—A new market for shrimps has been developed since November 1967. No official figures are yet available but imports by air from Eastern Canada have been publicized in the press and on national television. The Fishermen's Association, whose members might be adversely affected by competition from abroad, has protested. Importers, on the other hand, are still busy looking for new sources of supply in Canada and organizing the necessary air cargo services.

Swedes want fresh, boiled, chilled, unpeeled shrimps of a deep pink color and curled to a question-mark shape, which is why they have to be delivered by air. Scandinavian Airlines Services (SAS) says that it is using cargo space equivalent to that of two DC-8 jets a week to meet the demand. Frozen, peeled, canned or other types of shrimp are not acceptable.

Lobster—In the year or so since trial shipments of live lobster began and particularly since problems of delays in shipments have been solved, a fairly steady trade has developed. Canadian lobster competes successfully with lobster from Norway and domestic sources although it is a different type and there have been a few complaints of "shrinkage" of meat. Imports are prohibited between July 15 and September 15 inclusive.

Canada is the number one supplier of canned lobster. There is a customs duty on this of Skr 75 per 100 kilograms (about Cdn. $16.00).

Crab—Some frozen crab has come from Canada recently and importers have inquired for sources of supply for live crab. Frozen crabmeat is also in demand in retail packages of 6 ounces and for institutional use in 1, 2 and 2½ pound packages. The main competition is from the United States.

The U.S.S.R. has for some years been the dominant supplier of canned crabmeat in 6½ ounce tins. However, since 1966, Canada has developed a modest trade. Customs duty is Skr 75 per 100 kilograms.

Eels—The demand for frozen eels varies according to the size of the Swedish catch. Eels are further processed in Sweden by smoking or canning, or are used by restaurants. The most important sources of imports are the United States, Denmark, Britain, and occasionally Canada.

Salmon—The demand is primarily for fresh frozen salmon with a preference for the Atlantic over the Pacific varieties, although both are imported into Sweden. Frozen salmon is often smoked in Sweden. Canada is also a leading supplier of smoked salmon.

Importers say that there is a market for frozen salmon steaks, both packaged for the retail trade and also for institutional use. The trade in Sweden is somewhat confused by the lack of uniformity and coding for quality, size, date and place of catch. They believe that buying would be simplified if a uniform grading system were to be adopted.

Sweden is not a large market for canned salmon. We face competition from Japan and the U.S. but last year Canada was the leading supplier.

Halibut—Norway and Denmark are the leading suppliers of fresh and frozen halibut. Canadian halibut appeared on the Swedish market for the first time last year. The possibilities for this product are worth examining.

Mink Food—The trade in mink food has developed in recent years to a volume of 7,000 to 8,000 tons a year. This is primarily fish offal shipped by refrigerated vessels from fish-processing plants in the Atlantic Provinces to mink food kitchens in Scandinavia. A central depot is now planned in Kiel to distribute Canadian fish offal to both Scandinavian and Continental European mink farms.

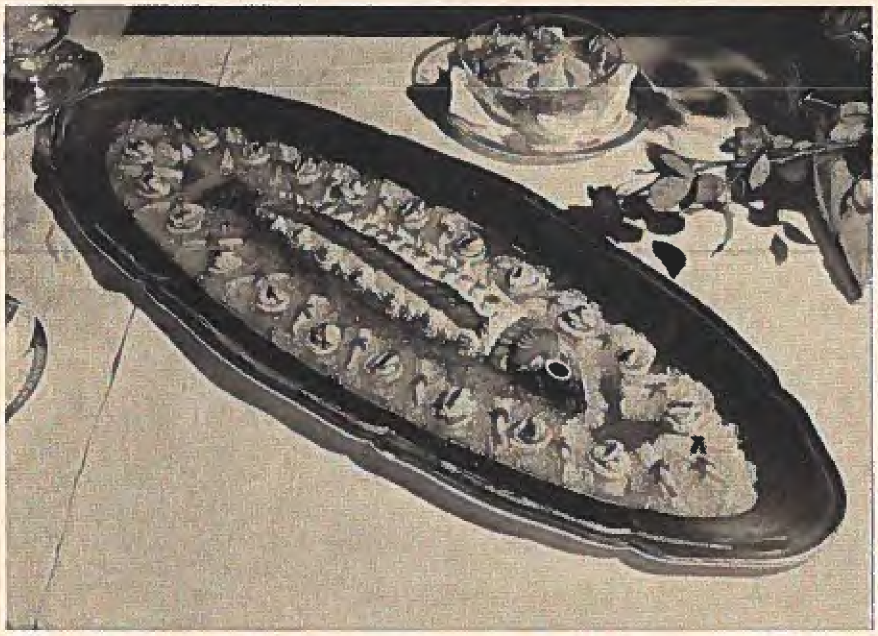
—D. S. ARMSTRONG,
Commercial Counsellor,
Stockholm.

Switzerland

Salmon, smoked and canned; lobster

■ Generally speaking, the Swiss market for fish and marine products is small. The yearly per capita consumption of all varieties, fresh, frozen and canned, is only four kilograms. This market has been developing steadily, however, since the end of the Second World War as eating habits are slowly changing. In 1967, Switzerland imported 22,897 metric tons of fish and marine products of all kinds, for a value of Cdn.$25 million. The corresponding figures in 1966 were 21,822 tons and $21.5 million. The main suppliers are the European countries north, west and south of Switzerland.

Salmon and lobster are considered luxury foods in Switzerland but thanks to economic prosperity, they are now within the reach of a larger segment of the population. Hotels and restaurants throughout Switzerland take up a substantial part of this



Elaborately decorated Canadian salmon is served at the Hotel Bellevue in Berne.

market, but any recession in the tourist trade has an appreciable effect on sales.

Salmon—Fresh and frozen salmon are not listed separately in Swiss import statistics and it is not possible to ascertain the exact quantities entering Switzerland. According to the trade, fresh salmon is supplied by Denmark (Bornholm salmon), and Norway. Frozen salmon comes from Canada and Denmark (Greenland); in 1967, Canada supplied 90,852 kilograms compared with 90,667 in 1966. Imports of smoked salmon are increasing; the main suppliers are Denmark, France, West Germany and Norway. Swiss statistics for 1967 do not list any imports of smoked salmon from Canada, but it appears that recently some contacts were established for supply from Canada. In canned salmon, Canada has a leading position on the Swiss market. In 1967, imports amounted to 92,437 kilograms compared with 57,370 in 1966. Competitors are the United States (Alaska), Denmark and Japan.

Lobster—In 1967, Switzerland imported 303 metric tons of lobster, crayfish and crab, for a value of $1,276,000, six tons less than in 1966. Canada's share, consisting of live lobsters, was 13.3 tons, or 4.4 tons less than in 1966. Denmark, Iceland, Ireland, Australia and South Africa were the most important suppliers. The import of canned crustaceans also declined from 177 tons in 1966 to 174 in 1967. Canada, which supplied 9.6 tons in 1966, shipped only five tons in 1967. The main suppliers were the U.S.S.R., France and Japan.

Duties and Taxes—Under the general tariff, the following import duties apply, per 100 kilograms gross weight, in Swiss francs (One Swiss franc = Cdn.$0.25): fresh and frozen salmon 3, smoked salmon in containers over three kilograms 2, smoked salmon in containers of three kilograms or less 10, canned salmon 10, fresh and frozen lobster 70, canned lobster 120.

Under the EFTA tariff, imports of the above are duty-free, with the exception of smoked salmon in containers of over three kilograms which pays the normal rate. No import licences are needed and there are no quotas for fish.

The veterinary tax is Sw.Fr. 13 per 100 kilograms gross weight. This is reduced to Sw.Fr. 1 for canned salmon and canned lobster imported from EFTA countries. Sanitary inspection of imported fish and other marine products is governed by a special set of regulations, the "Sanitary Inspection and Food Hygiene Order Applicable to Imports of Meat and Meat Preparations". Particular care must be taken in the shipment of live lobsters to Switzerland. The claws of the animals must be fastened with rubber bands and not with wooden plugs. There should only be two layers of lobsters per case. Prices for all imports from Canada are usually quoted c.i.f. Rotterdam/Antwerp or Zurich airport.

Swiss importers do not disclose their sources of supply nor the prices asked by competitors. It would appear, however, that Canadian exporters are quite competitive in the Swiss market and their products have a good reputation for quality. As consumption expands, the outlook for Canadian exporters should be bright.

—M. MEISTER,
Commercial Assistant, Berne.

West Germany

Herring, salmon, eels, Queen crab

■ There is probably a greater variety of processed fisheries products consumed in Germany than in any other European country—and the German market seems to offer a tremendous potential for imported processed seafoods. It has a large population, a rising disposable income, a good standard of living, a considerable acceptance of processed and convenience foods, and a willingness to buy imported varieties.

Although Canadian salmon, eels, lobster and Greenland halibut are already well known in Germany, there are certain types and packs of Canadian fish products which have not yet been sold in significant quantities. None of these products is produced in volume by EEC member countries.

Thus Canadian products are on an equal footing tariff-wise with the competition in seeking to win over German consumers. As consumer spending is again showing strength in Germany, this is an excellent time to promote exports of these Canadian fish products to this country.

Let me deal with them by species.

Salmon—Atlantic salmon and certain varieties of Pacific salmon are well received when frozen, dressed or for tbe restaurant trade. Mild cured salmon for smoking, particularly from the Pacific Coast, is also well received. More canned pinks, coho, and sockeyes in consumer sizes could possibly be sold. The competition comes chiefly from Japanese products with similar prices, but Canadian quality is preferred. A well-directed advertising campaign at this time could substantially improve the sales of salmon products.

Fresh Atlantic salmon, packed with ice and shipped by air, is in demand now for the restaurant trade.

Queen Crab—Alaska King crab is now in short supply and frozen blocks of one pound and five pounds are currently being sold in Hamburg at U.S.$1.80 per pound c.i.f. It would appear to be a good time to introduce Atlantic Queen crab, which should be lower in price. It cannot be overstressed that samples must be of top quality and shipments must conform to this high standard.

Eels—West Germany is one of the largest markets for eels in Europe. Canadian shipments to the market have declined recently because of the lower prices quoted by other sources of supply. This situation can be improved by better handling, grading, and packaging techniques.

Silver eels with pointed heads are preferred. They should be undamaged and, when not shipped alive, should be frozen shortly after catching. Grades (1-2 pounds, 2-3 pounds, etc.) should be packed separately in cartons of no more than 30 to 50 pounds. Glazing is desirable but should not be overdone because this means excessive weight and consequently high freight. On May 1, 1968, a new air freight rate for minimum shipments of 2,200 pounds of eels from Montreal to Hamburg first came into force. This rate is substantially lower and should help Canadian exporters.

Herring—There is a large market in Germany for fresh and frozen herring. However, prices paid to Scandinavian and other European sources of supply are low by Canadian standards, particularly in view of the higher freight rates from Canada. However, the possibility that we can supply for delivery in April, May and June, when seasonal fishing for herring has stopped in Europe, should not be ruled out. Canadian producers, particularly those with regular chartered sailings with other frozen fish to Europe, should carefully explore this prospective market. Further information can be obtained from the Fisheries Division, Agriculture and Fisheries Branch, Department of Trade and Commerce, Ottawa.

—DAVID H. CLEMONS
Vice Consul, Hamburg.

South Africa

Canned sardines, canned and smoked salmon

■ Canada's exports of fisheries products, mainly canned sardines and canned and smoked salmon, to South Africa have nearly doubled during the past five years, despite the system of import control based on quotas for each individual importer. This system was first introduced during 1948 and further intensified in 1961 by the addition of a "restricted list" including most foodstuffs. Canned salmon and sardines, however, are not available from the extensive and expanding South African fishing industry.

Following the significant relaxation in import control announced in December 1967, with larger quotas, and thanks to a buoyant economy and full employment, the prospects for increasing Canada's traditional exports of canned sardines and canned salmon to South Africa are good. In addition, Canadian smoked salmon is a new commodity that is finding increasing favor here. Because South Africa did not devalue its currency and is unlikely to do so, increased sales in the future should be assured.

Although the white population is still the main market for imported foodstuffs, consumer spending by the other South African people—Indian, Colored and African—is increasing relatively faster. These people are significant buyers of imported sardines and, to a lesser extent, of salmon.

Sardines—The main competitor of the imported canned sardine is the locally produced pilchard, a different fish with an entirely different flavor, much cheaper and with a high food value. The main supplier of sardines to South Africa has always been Norway and during 1966 Canada ousted

RECENT COMPARATIVE PRICES OF SARDINES

Canadian	100 — 3¼ oz.	Sardines keyless	$ 8.45 c.i.f.
	100 — 3¼ oz.	Sardines with keys	$10.10 c.i.f.
British	100 — 3¼ oz.	Sild with keys	$ 8.16 c.i.f.
Norwegian	100 — 3¼ oz.	One layer with keys	$12.45 f.o.b.
	100 — 3¼ oz.	Double layer with keys	$14.37 f.o.b.
Portuguese	100 — 4½ oz.	Wrapped with keys	$11.85 c.i.f.

RECENT COMPARATIVE PRICES OF CANNED SALMON

Canadian	48 — 7½ oz.	Fancy pink salmon	$16.20 c.i.f.
	48 — 7½ oz.	Fancy coho	$20.22 c.i.f.
	48 — 7½ oz.	Fancy sockeye	$25.25 c.i.f.
Japanese	48 — 7½ oz.	John West sockeye	$17.15 f.o.b. U.K.

Britain from second place, with a 16.4 per cent share of the market. Imports of Canadian sardines during 1966 totalled 608,400 pounds valued at about $217,000 and in 1967, the value was $257,000. It is likely that sales of Canadian sardines would have been even larger had packers concentrated more on key-wrapped tins which the native population prefers.

On sardines, Canada and Britain enjoy the Commonwealth preferential tariff rate of $2.25 per hundred pounds. For other countries the rate is $4.14. The Kennedy Round has not affected this tariff.

Canned Salmon—Imports of canned salmon into South Africa over the past four years have remained fairly static but with the relaxation of import control they are expected to rise. During 1966 imports declined slightly because of the short supply of first-grade pinks and the high prices of coho. During 1966 South Africa imported 526,900 pounds of canned salmon from Canada valued at some $324,850. Grade B pinks should probably be avoided because of strict South African inspection standards. Canada's only real competitor in this field is Japan, which provides half of Canada's share. Salmon from both countries is apparently acceptable. The duty rates on salmon are the same as for sardines.

Smoked Salmon—There is a growing market in South Africa for smoked salmon, traditionally supplied from Scotland. Canadian processors must be prepared to smoke their salmon to conform to the preference of local buyers for a light salt cure. Sales of this commodity have been rising steadily and Canadian exports to South Africa of about $50,000 a year should increase considerably because supplies seem to be larger. The import duty on all smoked salmon is the general tariff rate of $4.14 per hundred pounds.

Canadian smoked salmon lands in South Africa at $1.55 per pound c.i.f. The price of the Scottish product is $3.39 f.o.b and of Irish salmon $2.95 f.o.b. per pound.

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

Australia

Canned salmon, sardines, frozen fish

■ Canadian fish exporters have found Australia an excellent market, provided they can meet competition from other exporting countries.

Canned Salmon—Australia is a very large market for canned salmon. Fancy pink and sockeye salmon are the most popular. Our main competitors are Japan, the United States (specifically the Alaskan pack) and, to some extent, the U.S.S.R. Japan undoubtedly controls the largest share of the market and offers the lowest prices. The Japanese price for sockeye according to the trade is approximately $5.61 f.i.s. (free into store) for one dozen halves. The best possible prices which we gathered from the trade for fancy pink salmon are approximately $4.09 per dozen f.i.s. for halves and $2.01 per dozen f.i.s. for quarters. We have also been told that local agents for Japanese suppliers are offering large buyers standard quality pinks, cohos, and sockeye at below these prices. Tips and tails of sockeye and coho are also sold in large quantities for about $3.84 per dozen f.i.s. This has proved to be such a popular product that two of the larger distributors of Japanese salmon who normally compete with each other combined to place one order which accounted for the greater part of the Japanese pack of tips and tails.

A Canadian company which can meet these prices will undoubtedly have a great deal of success in Australia. Provision should, however, be made also for initial promotion to bring unknown brands to public attention. Tips and tails are not normally packed in Canada, but they (or a competitive product) would find an excellent market.

Canned Sardines—Foreign sardine suppliers competing with Canada for Australian business have been carrying out extensive promotion campaigns. One Scandinavian supplier, for example, has three promotion men as well as the agent in the State of New South Wales. They are attempting to capture a larger share of this market by stressing quality. Sardines in oil from Norway and Portugal packed in 3¾-ounce cans are currently retailing at between 16 and 29 cents in the major supermarkets.

Frozen Fish—Canadian suppliers are well placed to sell frozen fish to Australia. Flounder (sole), cod, perch, and haddock are of considerable interest because Australia does not catch them and has to obtain all its requirements from overseas. Our major competitors are the Scandinavian countries. We have been unable to determine current prices but we know that sometimes they have been below those quoted by Canadian suppliers. Major retail outlets have found Canadian frozen fish of the types mentioned superior in quality and they like the attractive and functional packaging. (Australian buyers have been known to turn down offers of fish simply because they didn't like the packaging.) Price and ability to supply the year round are, of course, also important.

Shellfish—Crabmeat and crayfish tails are of interest and one large food chain is currently doing a market study with Canadian shrimp. Australia produces a large quantity of shrimp and Canada may find it difficult to meet the price of the local product.

The Commonwealth Division of the Office of Trade Relations in Ottawa can provide information on Australian packaging and labelling requirements. Import duties should be checked but they are generally so low that they have little bearing on a company's ability to export. The Canadian Trade Commissioners in Sydney and Melbourne would be pleased to receive export prices and samples of packages and labels from Canadians interested in exporting to the Australian market and will get the trade's opinion for you.

—D. D. VAN BESELAERE,
Assistant Commercial Secretary, Sydney.

Japan

Good market for fish roe—a luxury product

■ Quality is the key to success in selling fish roe to Japan's discriminating buyers. Exporters must exercise great care in preparing and packing for the Japanese market, grading the roe on the basis of size, color, taste, smell, consistency and general appearance.

Fish roe is a traditional treat during Japan's New Year festivities, although better Japanese restaurants will provide roe for wealthy customers the year round.

Herring Roe—Herring roe is considered the most delicate of fish roe and the Japanese consume about 700 metric tons per year. Domestic production fluctuates considerably, with the result that competition is intense among foreign firms supplying the residual demand. So far this year domestic production has reached only 20 per cent of last year's figure. This will leave a sizeable part of the market open to foreign suppliers, which include Alaska, the U.S.S.R., Norway and Canada.

Japanese buyers are prepared to pay for quality herring roe. Prices range from U.S.$400 per metric ton to U.S.$3,500 per metric ton c. and f. Japan. The roe is generally packed in polyethylene-lined wooden boxes of 50 and 100 pounds net weight.

Another Japanese delicacy, herring roe on kelp, is being imported from Alaska at c. and f. prices of U.S.$1.80 to U.S.$2.20 per pound. Salted and packed in 200-pound wooden barrels, this product must be refrigerated. Imports of herring roe and herring roe on kelp require an import licence and are subject to a 15 per cent import duty.

Salmon Roe—Imports of salmon roe are expected to exceed 4,000 metric tons this year and exporters can expect keen competition from U.S. suppliers. Salmon roe is generally packed in 10-kilogram boxes with polyethylene liners. Prices will probably range from U.S.$35 to U.S.$50 for salted chum roe and U.S.$10 to U.S.$30 for salted pink roe (f.o.b. Alaska).

One of our officers snapped a Japanese fish seller outside his typical shop.

Other species of salted roe will probably bring prices of U.S.$1 to U.S.$2 per pound. The import duty on salmon roe is 15 per cent.

Salmon Caviar—The U.S.S.R. will be supplying 40 tons of salmon caviar in 1968. At a Tokyo wholesale price of Cdn.$7.45 to $8.00 per kilogram, this product is cloth wrapped and shipped in 15- to 20-kilogram net weight wooden barrels. Caviar faces a 20 per cent import duty.

Cod Roe—The current market for cod roe is not promising. Domestic production in 1967 exceeded 12,000 metric tons and additional quantities are scheduled to come from North and South Korea, the U.S.S.R. and Northern Europe.

—G. M. WANSBROUGH, *Assistant Commercial Secretary, Tokyo.*

Correction

The April 27, 1968, number of "Foreign Trade" carried a brief article on the survey of Guyana's power needs and how to meet them being carried out by Shawinigan Engineering Company Ltd. of Montreal. The article stated that "This investigation . . . will also permit Montreal Engineering to make an economic analysis and recommend a co-ordinated program of developing hydro and thermal power for this South American country." This statement was incorrect: Shawinigan Engineering is the sole consultant involved in the study and is responsible for all aspects of it. The preliminary investigation has been completed and Shawinigan is well into the second phase—a study of the feasibility of developing the Tiboku Falls site.

Selling to Hotels in the Eastern Caribbean

Major international hotel chains are now beginning to invest in the Eastern Caribbean islands. For alert Canadian engineering consultants, contractors, contract furnishers, and equipment suppliers for food service this development could mean business.

JOHN D. TENNANT, *Assistant Commercial Secretary, Port-of-Spain.*

■ The Eastern Caribbean*—which in the pre-jet age was a region in which one "got away from it all"—is now in the throes of rapid tourist development.

Tourism, both in terms of the number of tourists and tourist facilities, has been growing at a significant rate for several years. But the important trend which has been developing in the Eastern Caribbean during the last year is the evident interest in it of major international groups, including Hilton International, Intercontinental Hotels, Sheraton, Holiday Inns, BOAC, and Trust Houses (Britain). This is in distinct contrast to the existing situation where, other than two hotels operated by Hilton International, less than half a dozen have more than 100 rooms.

Trinidad and Tobago, which expects construction of 700 new rooms to begin this year, is an example of the future pattern. Two major hotels (200 and 126 rooms) are definite starters and plans for three more of a similar size are advancing. In Guadeloupe, the Fifth Plan calls for a trebling of the number of rooms from 470 in 1965 to 1,500 in 1970.

For the Canadian businessman, the potential in the hotel field is excellent but it is certainly not unnoticed by others. Among those who should pay close attention to the potential of this market are:

- Consultants with experience in specialized fields such as marinas, golf courses and kitchens
- Consultants in hotel management
- Contractors
- Contract furnishers and institutional furniture manufacturers
- Food service equipment suppliers
- Institutional food suppliers

and, of course, hoteliers and investors themselves.

*Includes Trinidad and Tobago, Barbados, the Leeward and Windward Islands, Guadeloupe and Martinique.

EASTERN CARIBBEAN TOURIST TRADE*

	Hotel Capacity (1965)	*No. of Tourists 1965*	*No. of Tourists 1966*	*Percentage Change*
Antigua	1,250 beds	48,651	55,657	+14
Barbados	3,150 "	68,418	79,104	+16
British Virgin Islands (est.)	100 rooms	16,316	14,013	−14
Dominica	110 beds	5,355	6,040	+13
Grenada	550 "	13,850	18,135	+31
Montserrat	160 "	7,412	7,314	− 1
St. Kitts/Nevis/Anguilla	260 "	7,116	6,586	− 7
St. Lucia	435 "	12,908	14,512	+12
St. Vincent	260 "		6,716	
Trinidad & Tobago	1,050 rooms	57,920	64,910	+12
For Comparison				
Martinique	225 "	14,400		
Guadeloupe	470 "	13,312		
Bahamas		720,420	822,317	+14
Bermuda		187,265	210,598	+13
Jamaica		300,258	345,288	+15

*Statistics generally exclude immigrants, stopovers of less than 24 hours, and cruiseship passengers. The figures are gathered in different ways and are not fully comparable.

Service, Service, Service

A consultant's sales approach will, of course, vary from that of equipment and food suppliers but service in both cases is an important prerequisite. Frequent visits are necessary (certainly in the early stages), alert local associates invaluable, and promptness essential.

Consultants and contract furnishers should use a flexible approach. Experience in the Caribbean is an important plus factor, but there is an entrée for other firms with a good record at home, particularly if they can work initially with hoteliers to whom they are already known in Canada and the United States. Local associates are advisable.

Food and equipment suppliers will require stocking distributors, preferably one of several agents who specialize in the hotel trade.

United States competition—claiming benefit from its proximity and its experience in Puerto Rico, Miami and the Bahamas—is strong. Signs of a major British effort are also evident. Canadians, however, should not under-rate their chances. Several factors can work to their advantage:

1. Although virtually all equipment for new hotels enters duty-free from all sources under concessions given to hoteliers, replacements can be subject to normal duties. This post-sale advantage can give Canadian goods—which enjoy a preferential tariff in the Commonwealth Caribbean—the edge even in initial orders.

2. There is a strong Canadian flavor to the tourist industry in many islands and Canadians are well received at all levels. Canadian investors are involved in several major hotels and the flow of Canadian tourists to the islands has grown far more rapidly than from any other major source.

3. Canadians will find that shipping services from the East Coast are frequent and competitive and this should, in most instances, place them on at least an equal footing with other suppliers.

4. The Export Credits Insurance Corporation has indicated its readiness to support Canadian chartered bank loans to provide short-term finance (two to five years) for hotel equipment and furnishings.

One problem facing any supplier to the Caribbean is the breadth of the market. As the attached tourist figures show, Trinidad and Tobago, Barbados and Antigua are the prime markets in the Eastern Caribbean. Trinidad and Tobago and Barbados are the base of operations for most architects and construction firms. Food and equipment suppliers will find that separate agents for Barbados and for Trinidad and Tobago can provide a good starting point. Most Barbados firms are oriented to cover the Leeward and Windward Islands, though Antigua may, in some instances, be an exception.

In the Leeward and Windward group, Grenada and St. Lucia show the most immediate promise for major development. In St. Lucia, for example, Canadian external aid is supporting a Cdn.$100,000 study of the development of the Vieux Fort area and has also committed Cdn. $2.1 million for improvements which would allow a former U.S. Air Force base (Beane Field) to handle international jet traffic.

St. Vincent, Montserrat, the Grenadines, Dominica and St. Kitts still possess a romantic flavor but are being eyed for major developments. Airport improvements—also part of the Canadian/Commonwealth Caribbean Aid Program—should provide some of the stimulus.

Even Surinam and Guyana—more closely linked to the Caribbean than to the South American continent of which they are a physical part—offer long-term potential for the more adventurous tourist seeking safaris, jungle surroundings, or a more primitive flavor in a vacation.

Over-all, proposed expansion of tourist facilities is unlikely to meet the potential demand in the next three or four years and the arrival of jumbo jets at about that time should again open the gulf between available hotel space and potential inflow.

An example of the potential awaiting development is an estimate given by the 1966 Tripartite Economic Survey, sponsored by the United States, Canada and Britain. The study, covering economic development of the Leeward and Windward Islands and Barbados, estimated conservatively that "there could be a further 260,000 visitors staying in island hotels by 1970, in addition to the 141,000 who stayed in 1965." Expansion of this size assumed a massive increase in available space in all islands which is only now beginning to materialize.

There are some problems. One is seasonal—low summer occupancy. Others are the provision of utilities (electricity, sewers and roads), the training of sufficient staff, and the attraction of major finance (both public and private). These have all required attention before investment on a large scale is undertaken. These barriers are disappearing and the outlook now is definitely optimistic.

Immediate growth is obvious and development over the next two years even more promising. Competition is keen but suppliers of goods and services who are in on the ground floor stand to gain later from these early efforts to penetrate the market.

Additional information on current projects, buying patterns, potential areas of development and suitable local associates is available to equipment and food suppliers, hoteliers and investors from the Department of Trade and Commerce in Ottawa (F. R. Harris, Commodities Branch, phone 992-9081), and from the Commercial Counsellor for Canada, P.O. Box 1246, Port-of-Spain, Trinidad, W.I.

More Room at the "Pig and Whistle"

■ Britain expects to play host to six million visitors a year by 1970 and the Government is helping the hotel industry to bring its facilities up to date. Both grants and loans will be available for hotels with 10 or more bedrooms, except in greater London where the minimum will be 25 bedrooms. Grants will be at the rate of 20 per cent of cost (25 per cent in development areas), subject to a ceiling of £1,000 for each bedroom in new hotels (£1,250 for each new bedroom in development areas). The Government will help with improvement schemes where the cost of buying and installing fixed plant and equipment is over £1,000 in a financial year.

Loans are, broadly speaking, on the same lines as at present but less restricted in scope. New hotel projects could qualify for loans of up to 30 per cent, provided that the cost of building unspecified fixed equipment is over £20,000. Extensions and improvements to existing hotels could qualify for loans of up to 50 per cent, provided that the cost exceeds £10,000. The maximum loan for a single project will be £500,000 and the maximum period of the loan will be 20 years for new hotels, 15 years for extensions and improvements.

—D. L. STEVENS,
Commercial Officer, London.

trade fairs

Canada Aboard the Boat Show

■ Canadian-built watercraft, combining design flair with practicality and water safety, were given full "Navy treatment" during the recent National Boat Show in New York's Coliseum. Lined up for inspection were boats ranging from the latest in luxury yachts, cruisers, and sloops to the ever-faithful canoe—all displayed by 13 Canadian manufacturers.

And the "Navy treatment"? A nine-year Navy veteran piped visitors aboard the imposing Canadian display and distributed bosun's pipes as mementos of Canada's latest boating parade.

The companies participating reported on-site sales valued at almost $1 million, a considerable increase over last year's $193,340. Seven of them were first-time exhibitors in Canada's third consecutive entry sponsored by the Department of Trade and Commerce.

Participating Companies

aluminum power boats, canoes, sailboats
Aluminum Goods Limited
Toronto, Ontario

fiberglass sailboats
D. A. Bamford (Marine) Limited
Scarborough, Ontario

fiberglass sloop
Canadian Sailcraft Company
Willowdale, Ontario

fiberglass canoe, sailboat
Clarkcraft Industries
St. Catharines, Ontario

fiberglass cruiser
Graham Products Limited
Inglewood, Ontario

sailboats
Grampian Marine Limited
Oakville, Ontario

daysailers
Harber Manufacturing Limited
Fort Erie, Ontario

Hinterhoeller Limited
Niagara-on-the-Lake, Ontario

Whitby Boat Works Limited
Ajax, Ontario

sailcraft
Industrial Shipping Company Limited
Mahone Bay, Nova Scotia

pedal boat
Les Industries Sauriol Ltée
Ville Laval, Quebec

yachts
Olympic Yacht Craft Corporation
Montreal, Quebec

hydrofoil
Water Spyder Marine Limited
Downsview, Ontario

Sales High at Hotel-Catering Show

■ In spite of the devaluation of the pound sterling and a "Buy British" campaign launched on the opening day of this year's Hotel and Catering Equipment Exhibition in London, product interest in Canadian goods ran high. The 12 participating Canadian companies reported actual sales of over $68,000, and anticipated sales this year of close to $1.25 million could well double in 1969. Big factor in this increase could be a new device, the Bell Captain, shown by Captain International Industries Ltd. of Vancouver—if it is accepted by British hotels and motel chains.

This unique, coinless dispensing machine provides instant room service and is designed to hold a variety of drinks and sundries. It has already been accepted experimentally by the Park Lane and Cumberland Hotels in London and several motels or motor hotels elsewhere. These trial orders could result in $2.5 million worth of rented equipment being installed in several British hotels.

Sharing the spotlight was a new exhibitor, Stefan Siwinski Designs of Toronto, Ontario. Mr. Siwinski's ultra-modern institutional furniture drew a large number of inquiries from countries as far apart as Britain and Israel, and these resulted in $150,000 worth of expected business in 1969.

Another high-interest feature was a new sandwich-maker, the Toast Treat, displayed by W. Bardeau Limited, a Downsview, Ontario, manufacturer. This grill-like electrical machine is designed for institutional use only and attracted some 160 inquiries while being demonstrated. The company reported that agency arrangements have been established in several European countries and Pakistan. Sales for the coming year are estimated at $100,000.

Interest in Canada's exhibit at the International Building Exhibition, Olympia, London was highlighted by the visit of H.R.H. Prince Philip (second from left). He was accompanied by L. H. Ausman, Minister (Commercial), (left) and O. Hickie, Commercial Secretary (Timber), (third from left). Prince Philip showed keen interest in the display.

Visitors to the Canadian exhibit at the National Boat Show in the Coliseum, New York, last February received a royal welcome from a member of Canada's Navy. Leading Seaman Frank A. Beer is seen here piping visitors aboard in true naval tradition, before an eager crowd of onlookers.

Electronic teaching aids were a major interest at the recent American Association of School Administrators' Convention in Atlantic City. Explaining the operation of one of these aids to an American school official and his wife is J. S. Taylor (second left) of Electronic Controls Limited, Belleville, Ontario. W. J. Millyard, Canadian Consul and Trade Commissioner in Philadelphia, is seen on the left.

Tasty snacks provided by W. Bardeau Ltd., Toronto, one of the 12 participating Canadian companies at the Hotel and Catering Equipment Exhibition in London last January, became an instant success. Here the Hon. C. S. A. Ritchie, Canada's High Commissioner in London, samples the sandwiches. Prepared on the Bardeau Toast Treat machine, they can be made in a jiffy, using meat, jam, or any other filling. Watching him closely are: (left) W. Bradley, Managing Director of Keith Bradley Associates Ltd., representatives of W. Bardeau in Britain, and (right) L. H. Ausman, Minister (Commercial) in London.

Garland Commercial Ranges Limited, also from Toronto, topped sales at the show by selling its complete display of kitchen equipment for $35,000. This company expects sales from show contacts to exceed $100,000 this year and has begun negotiations for representatives in Africa and India.

The second highest sales ($14,500) were recorded by Moffats Limited, Weston, Ontario, maker of kitchen equipment. Show contacts resulted in definite orders for the next two years amounting to some $60,000.

Sales exceeding the $100,000 figure are also expected by Canadian Curtis Refrigeration Limited, Stoney Creek; W. C. Woods Company Limited, Guelph; The Paul Moore Company Limited, Winnipeg, and Moyer Diebel Metalcrafts Limited, Jordan Station, Ontario.

Participating Companies

sandwich-maker, sandwich grill, roll-a grill, waffle baker, coffee urn/maker, food warmer
W. Bardeau Limited
Downsview, Ontario

modular commercial refrigerators and freezers
Canadian Curtis Refrigeration Limited
Stoney Creek, Ontario

Bell Captain (coinless dispensing machine)
Captain International Industries Ltd.
Vancouver, British Columbia

concentrated air freshener
Chemico-Pharmaceutical Company Inc.
Montreal, Quebec

ranges, ovens, hot plates, griddles, food warmers, deep-fat fryers
Garland Commercial Ranges Limited
Toronto, Ontario

steam cooker, coffee urn
Gaunt Steel Products Limited
Toronto, Ontario

food warmers, hotplate, deep-fat fryer, luncheonette range
Modern Kitchen Equipment Company Ltd.
Candiac, Quebec

beverage vending machine, snack vending machine, sandwich machine, automatic glasswasher
Moyer Diebel Metalcrafts Limited
Jordan Station, Ontario

broilers, griddles, electric fryers, hotplates
Moffats Limited
Weston, Ontario

glasswasher
The Paul Moore Company Limited
Winnipeg, Manitoba

chairs, reception area furniture (institutional)
Stefan Siwinski Designs
Toronto, Ontario

commercial chest-type food freezers
W. C. Wood Company Limited
Guelph, Ontario

Canadian Education Aids Score

■ Canada's initial participation in the annual American Association of School Administrators' Convention (AASA) in Atlantic City recently was a great success for manufacturers of school aids. During the five-day show over 16,000 school administrators, superintendents, board members, agents, and distributors visited the new Haddon Hall where the Canadian exhibit was located.

As the only foreign entrant, Canada featured a diversified range of educational aids (for the full list of 12 Canadian manufacturers and their products, see February 17, 1968, issue of *Foreign Trade*), which drew many inquiries. The exhibit was situated in an ideal spot and gained immediate attention from all entering the hall. The Canadian stand was praised by administrators who regularly attend the convention.

The most significant change in the show since 1965 was the great alteration in its composition. At that time all the exhibitors were housed in one great hall (Haddon Hall) and displayed a striking variety of school aids. This year, the space was increased by 60 per cent (there were three showrooms compared with one in 1965), and there was a noticeable swing to electronic teaching devices. This trend is still gaining ground.

In 1965 there was a long list of exhibitors wanting to get into the show—among them Canada. Three years elapsed before the initial application was accepted but the results have been worthwhile. Exposure to AASA visitors should mean a lot of new business for Canadian manufacturers in a rapidly growing industry.

Canada is to have an exhibit sponsored by the Department of Trade and Commerce in the 1969 show.

—WILEY J. MILLYARD,
Consul and Trade Commissioner, Philadelphia.

International Building Exhibition

■ As part of a continuing campaign to promote sales of Canadian timber, plywood, and other wood products in Britain, the Department of Trade and Commerce has participated again in the International Building Exhibition at Olympia, London. Regarded as the best and most important exhibition in the building field, it was founded in 1895 and is held every two years.

As one of London's largest exhibitions, the IBE occupies all available space in Olympia's four vast exhibition halls. Usually some 900 exhibitors participate, with displays of many products used in house construction and the latest in building developments and techniques. Show officials report a long list of would-be exhibitors, but there is no more space.

This popular show attracts over 250,000 visitors from Britain and Europe, as well as many others from such widely separated countries as Iceland and Australia. A large proportion of these visitors are professionals associated with the industry—builders, architects, engineers, surveyors, representatives of building societies, and government housing authorities.

As in previous shows, Canada's exhibit was an institutional display of wood products from Canadian industries, and demonstrated the correct application and use of a number of Canadian wood products for timber frame construction.

Because of the current high interest in the British building industry in this form of construction, Canada's timber frame theme and the message it conveyed proved timely and well-conceived. By showing some of the major basic building elements, such as component panels, discussions were stimulated and a number of inquiries came from interested visitors. Many visitors commented favorably on the appearance and content of the Canadian display.

Among the numerous distinguished visitors to the Canadian exhibit was H.R.H. Prince Philip, accompanied by L. H. Ausman, Minister (Commercial), and O. Hickie, Commercial Secretary (Timber) from the London office. During his tour the Prince expressed a lively interest in the exhibit.

—O. HICKIE,
Commercial Secretary, London.

Czechoslovakia's Plastics Industry Looks West

CZECHOSLOVAKIA'S production of plastics in 1966 totalled 130,000 metric tons but per capita consumption was well below the average in industrial countries of Western Europe. In an effort to remedy this, a special Chemical Industry Commission was set up under the Industrial Committee of the National Assembly to study ways of increasing production.

Demand in Czechoslovakia for chemical products in 1967, it is estimated, exceeded domestic capacity by some Cdn.$112 million worth of products. Larger requirements for synthetic fibers, plastics and products of the paper industry would account for half the shortage.

The Ministry of Chemical Industry Development called for a speedup in the construction of 24 plants now being built (this includes eight synthetic fiber plants and three for the production of plastics). There are also plans to build 30 new chemical manufacturing plants, about half of them to produce plastics. The British have been quick to follow up. In March 1967 a co-operation agreement was concluded between the British Plastics Federation and the Czechoslovak Chamber of Commerce. This was expected to provide a framework for a better understanding of Czechoslovakia's needs and the means of satisfying them. The document calls for more personal contact between British and Czechoslovak specialists at all levels. Two events designed to further common aims were a British technical conference in Prague in September and a visit to Britain by a Czechoslovak technical and commercial delegation to study developments in the British plastics industry. According to news reports, these are some of the Czechoslovak plastics industry's specific requirements.

Machinery and Equipment—The Czechoslovaks asked for technical information, data, and offers concerning:

Standard hydraulic machinery parts, including high-pressure pumps for the hydraulic circuits of injection-moulding machines.

Pneumatic elements for the assembly of hydraulic control circuits on moulding machines.

Bipel system injection moulding machine for thermosetting plastics.

Thermostats for conditioning of mould (e.g. Churchill system).

Filament-winding machines and auxiliary equipment for glass-reinforced plastics.

High-speed automatic horizontal injection-moulding machines with screw plastification (30, 60, 100 and 200-gram capacities).

Hydraulic pelleting machines for moulding powders (size of pellets up to 100 millimetres diameter and up to about 300 grams).

Automatic machines for blow-moulding small polyethylene bottles (10 to 50 c.c.). Other types of automatic machines for blow-moulding polyethylene bottles.

Modern high-performance printing equipment for printing on polyethylene bottles (whole production line).

Facilities and equipment for transporting granulated moulding materials from stores and railway containers to the plant or storage facilities.

Equipment for thermoplastic scrap reclamation, including high-performance mills, extruding and granulating machines.

Plastics Materials—Tbe Czechoslovaks would like to buy the following:

Special types of high-fluidity polystyrene for injection moulding of thin-walled packaging articles, especially material suitable for use in high-speed injection moulding machines.

High-fluidity ABS materials for injection-moulding of intricately shaped parts for household appliances, electronic devices, etc.

Polyethylene polymer or copolymer for the manufacture of large plastic containers, (high-fluidity, impact resistance, rigidity, toughness, stability, and heat-resistance are required).

Polyethylene polymer or copolymer for blow-moulding containers with capacities up to 100 liters for corrosive chemicals. Melamine/formaldehyde moulding powder for compression-moulding kitchen utensils.

Melamine/formaldehyde moulding powder for compression-moulding of intricately shaped parts of instruments.

Dies—Special types of steel are wanted for die-making.

Czechoslovak industry is also interested in purchasing and selling licences. Commercial and licensing transactions will continue to be handled by the various foreign trade corporations—Vienna.

trade lines

Brazil buys harvesters from Yugoslavia

Attractive financing arrangements, prices lower than available on the international market, and a favorable trade balance with Yugoslavia are believed to be the reasons why Brazil decided to purchase 300 harvesters there. Convention currency will be used and financing will be for seven years with a two-year grace period; interest is at six per cent. Brazil may also buy barbed wire, fishing boats and food processing complexes from Yugoslavia—Rio de Janeiro.

Communist China enters Singapore market

Over the past 15 months, nine department stores featuring goods from Communist China have opened in the island Republic where none existed before. The Singapore Government has not discouraged the move because the stores provide cheap goods of reasonable quality. The Chinese stores provide goods such as sewing machines, typewriters, cameras, suitcases, electrical goods, medicines, furniture, clothing and canned foods. In 1967 Singapore purchased about U.S.$100 million worth of finished products and raw materials from China. However, the Government has restricted imports of certain Chinese items which would compete with local products—Singapore.

Indonesia obtains U.S.$51 million from IMF

The International Monetary Fund has approved a standby arrangement for the Government of Indonesia to authorize drawings up to the equivalent of U.S. $51.75 million over the next 12 months. The arrangement is in support of Indonesia's program to stabilize and rehabilitate its economy.

Under the current national program, which came into effect in October 1966, Indonesia has progressed toward its over-all economic objectives. In 1967, the rate of inflation was reduced markedly, exports rose by 8 per cent, and the payments position improved. The Indonesian authorities are planning a concerted attack on inflation, plus steps to improve domestic production. Increased rice output, the procurement of larger supplies abroad, and improvements in the domestic distribution system are receiving high priority. Restrictions on monetary expansion and special emphasis on a balanced budget are major elements in the 1968 program. The standby arrangement will assist efforts to meet these objectives by providing the national authorities with a secondary line of reserves. Indonesia rejoined the Fund in February 1967 and has a quota of U.S.$207 million—Singapore.

Glasgow assesses hurricane damage

Recent government economies mean that fewer houses will be built this year in Scotland by local authorities although these are urgently required. The January 15th hurricane scythed through densely built-up areas, resulting in diversion of labor and materials to pressing tasks of demolition and repair. Complete figures are not yet available, but Glasgow alone estimates its loss at $20 million, half of which represents damage to 70,000 of 140,000 Corporation-owned houses. Over 1,000 homes declared unsafe must be torn down. All this work will require large supplies of building materials. The Canadian Government Trade Commission in Glasgow will be pleased to supply names of responsible Scottish building firms and to explore sales possibilities for Canadian building products. Scottish architects are, however, specifying British materials whenever possible to save foreign exchange—Glasgow.

Mexico plans large railway investment

The Mexican National Railways plans to invest U.S. $45.5 million during 1968 in operations, maintenance, construction and purchase of rolling stock, railway equipment and improvements in communications systems. The government-owned railway system will invest U.S.$12.5 million in the purchase of 211,000 concrete railway ties and the construction of several railway terminals and housing for railway workers. U.S.$2.2 million will be spent on renovating and extending the telecommunication and signalling services. About U.S. $30.6 million will be used to buy 51 locomotives and to replace engines in 30 locomotives which have been in operation over the past 17 years. Some 670 units of rolling stock will be made in Mexico—Mexico City.

Britain increases imports of paper and paper board

Britain's 1967 imports of paper and paper board totalled 2.05 million tons, valued at £136 million, a 16 per cent increase in value over 1966. Domestic production in the same period decreased by 2 per cent to 4.33 million tons in the face of a 1½ per cent rise in apparent consumption. Twenty-five per cent more pulpwood was consumed and the volume of home-grown softwood finding its way to the pulp mills increased by 51 per cent over 1966.

The major suppliers to Britain, by volume and percentage of total imports supplied, are: Canada, 579,000 tons (28 per cent); Finland, 494,000 (24 per cent); Sweden, 446,000 (21 per cent); and Norway, 151,000 (7 per cent). Of the paper imports, printing and writing paper alone increased 39 per cent. Of this, coated printing and writing paper sales increased by 73 per cent—London.

New Zealand increases timber sales to Japan

The Minister of Forests in New Zealand announced recently that exports of New Zealand logs and sawn timber to Japan will be valued at $12 million next year. In the year ended March 31, 1968, New Zealand will have supplied about 36 million feet of timber to Japan, and this amount is expected to increase by about a third. Sawn timbers have only recently been exported to Japan, but in the eight months ended March 30 sales have totalled 12 million feet. It is expected that sales of radiata pine will in the next twelve months reach a volume of about 60 million board feet, almost twice the amount now being sold to Australia—Wellington.

Germany to make aircraft guidance systems

Top electrical enterprises in West Germany have formed a company to make aircraft guidance systems, anticipating defence contracts. The new company is the E.S.G. Electronic-System-GmbH, Munich. The capital of DM400,000 was equally split up among A.E.G.-Telefunken, Rohde & Schwarz; Siemens A.G.; and Standard Elektrik Lorenz A.G. (a subsidiary of ITT of the U.S.)—Duesseldorf.

Brazil expands steel output at Volta Redonda

Government sources have announced that the Companhia Siderurgica Nacional (National Steel Mill) is negotiating with the Eximbank for a U.S.$30 million loan to expand its production facilities at Volta Redonda. Expansion plans call for an annual production of 2.5 million steel ingot tons—Rio de Janeiro.

New ferry service between Scotland and Ireland

The new £2 million "drive-through" vehicle and passenger ferry *Lion* represents an important development in cross-Channel communications. *Lion* operates a daily service between Belfast and Ardrossan and the indications are that this will eventually supplant the existing Belfast-Glasgow service, now reduced to three sailings a week. The Belfast-Glasgow service involves a nine-hour overnight voyage. *Lion,* operating from Ardrossan (20 miles southwest of Glasgow), cuts the time in half. Leaving Ardrossan at 10.00 a.m. the ferry reaches Belfast at 2.15 p.m. Departing from Belfast at 4.30 p.m. it arrives in Ardrossan at 8.45 p.m., in time to connect with services to Glasgow, Edinburgh, Perth and other points. *Lion* can carry 1,200 passengers and has room for 176 cars on the car deck. It also takes commercial vehicles and containers. Cars are driven on and off through large hydraulically-operated bow and stern doors—Glasgow.

U.S. buys interest in Trinidad telephone service

The Trinidad and Tobago Government has sold a 50 per cent interest in its telephone service to Continental Telephones Limited of the United States, which also has interests in Jamaica and Barbados. The Government will obtain approximately Cdn.$5.69 million in cash immediately. The new company will be known as the Trinidad and Tobago Telephone Company Ltd. —Port of Spain.

Sweden negotiates loan for aircraft from U.S.

A loan of U.S.$32.4 million has been granted to SAS for the purchase of 11 new jet aircraft (9 DC 9's and two Boeing 747's) from the United States. Another Swedish airline, LINJEFLYG, plans to negotiate with Douglas Aircraft for the purchase of two DC-9-20 aircraft. Wings and tails for DC 9's are manufactured at the Douglas Aircraft Company of Canada Limited's plant at Malton airport in Toronto—Stockholm.

Spain plans to divert Tagus waters

Surplus water from the Tagus, which flows into the Atlantic, is to be fed into the Segura to irrigate land in the Mediterranean provinces of Alicante and Murcia. The project, which involves dams, pumping stations, open channels and siphons, will be undertaken during the 1968-71 Development Plan at a cost of between $114 million and $143 million. Spain lacks experience in hydraulic engineering of this magnitude and will require foreign help for at least part of the work—Madrid.

Germany builds new zinc mill

A highly-automated 25 million D-Marks zinc rolling mill is being built near Datteln in North Rhine-Westphalia. Production is forecast for early 1969, and the huge plant is designed to produce 60,000 tons of strip and sheet a year. The plant is owned by the Rheinische Zinkwalzwerke GmbH & Co. KG, founded jointly in 1966 by three big metal companies—Vereinigte

Deutsche Metallwerke A.G., Frankfurt (Metallgesellschaft A.G.); Stolberger Zinc A.G., (Otto Wolff Group); and Grillo Werke A.G., Duisburg. Metallgesellschaft A.G. is also building a new zinc electrolytic plant in Datteln, scheduled to go into operation in the fall of 1968—Duesseldorf.

Australia builds metallized agglomerate plant

The world's largest metallized agglomerate plant, producing about 95 per cent iron in pellet form from iron ore, will be built at Dampier in northwestern Australia by a subsidiary of Conzinc Riotinto of Australia Ltd. and Kaiser Steel. The plant will use the Lurgi method developed by the Steel Co. of Canada and the Lurgi Co. of West Germany. Plant capacity has not been finally settled but initial annual capacity is likely to be about one million tons—Melbourne.

Iceland and Norway co-operate in canning factory

A company has been formed in West Iceland to build a factory to can up to 24,000 boxes of cod liver a day. Subsequently, salmon, crab, roe and other types of fish and shellfish will be canned. The company has an agreement with Stangeland, of Stavanger, Norway, which has undertaken to market the products—Oslo.

Australia considers new acid plant

The Electrolytic Zinc Co. of Australasia Ltd. is undertaking final feasibility studies to determine whether to build one of the world's largest pyritic sulphuric acid plants. The proposed site is Northern Tasmania and the plant would have a capacity of 1,200 tons of acid a day—Melbourne.

Housing progresses in Northern Ireland

New houses built in Northern Ireland since the war now total 153,000, involving a capital outlay of over £340 million. This means that more than one-third of the population is now living in postwar dwellings. Some 11,099 houses were put up in 1967, 599 more than in 1966. If this rate of progress is maintained, the Government's target of 12,000 houses a year by 1970 may be reached—Belfast.

Britain sends trade mission to West Africa

The leader of a 15-man trade mission from the Birmingham Chamber of Commerce and Industry to West Africa recently stated that they found many opportunities for increasing British sales in the French-oriented West African countries. These sales are apparently going to other countries for lack of effort by British businessmen.

The mission, which picked up orders of over one million dollars, also found continuing strong markets for British goods in Ghana and Nigeria, with demand for more sophisticated products increasing—Liverpool.

Ireland increases steel production

Gambles Simms (Ireland) Limited, steel stockholders and processors, are undertaking a new £600,000 development program. This includes the construction of two plants covering a total area of 250,000 square feet, one in Northern Ireland and the other in the Irish Republic. Site and civil engineering works on the first stage of the Northern Ireland project will begin almost immediately and include construction of a £250,000 steel service and processing plant on a 15-acre site—Belfast.

Foreign Tariffs and Trade Regulations

Australia

TARIFF BOARD REPORT ON WOODEN ARTICLES—The Australian Tariff Board recently published a report and recommendation on tariff rates on wooden articles. These articles included wooden doors, parquet flooring, prefabricated buildings, tool handles, broom and brush handles and bodies, textile bobbins and cones, cotton reels, spring rollers for blinds, oars, householdware and sundries. As a rule, both the general and the preferential rates of duty were increased although for some only the preferential rate was increased, thereby reducing the margin of preference. The evidence presented was that many wooden manufactures are now being made in Australia and, in the opinion of the Tariff Board, such manufacture should be assisted by tariff protection.

For further details about the change in rates, contact the Commonwealth Division, Office of Trade Relations.

Index to "Foreign Trade"

The index to Volume 128 of Foreign Trade, *July-December 1967, numbers 1 to 13 inclusive, is now available. If you would like a copy, please write to: The Editor,* Foreign Trade, *Trade Publicity Branch, Department of Trade and Commerce, Ottawa.*

Trade Commissioners on Tour

In Canada

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

Austria—R. J. L. Berlet, Assistant Commercial Secretary in Vienna:

Edmonton—May 30
Oshawa, Aurora—May 31

Chile—R. E. Gravel, Commercial Counsellor in Santiago:

Vancouver—May 27-31
Montreal—June 3-7

Ghana—R. J. G. Ledoux, Assistant Commercial Secretary in Accra:

Montreal—May 27-30
Quebec City—May 31

Kenya—J. B. McLaren, Commercial Secretary in Nairobi:

Toronto—May 27-28
Montreal—May 29—June 5
Halifax—June 6-7
Vancouver—June 10-13
Kelowna—June 12

Nigeria—N. L. Currie, Commercial Secretary in Lagos:

St. Thomas—May 29
Burlington, Niagara Falls—May 30
Sault Ste. Marie—May 31

U.S.S.R.—R. A. Bull, who will be posted to Moscow as Commercial Counsellor:

Burlington, Hamilton—May 29
Brantford, Woodstock—May 30
Kitchener, Galt—May 31

Yugoslavia—Z. W. Burianyk, Commercial Secretary in Belgrade:

Edmonton—May 30
Toronto—May 31
Ottawa—June 3-7

Temporary Duty in Ottawa

The following will be on temporary duty in Ottawa and may be contacted through the Trade Commissioner Service, phone 992-9930 (area code 613).

R. J. L. Berlet, Assistant Commercial Secretary in Vienna, June 3-14.

D. J. Browne, Assistant Commercial Secretary in Guatemala City, June 19-28.

R. A. Bull, Commercial Counsellor to Moscow, U.S.S.R., June 3-6.

Z. W. Burianyk, Commercial Secretary in Belgrade, Yugoslavia, June 3-7.

D. I. Ditto, Assistant Commercial Secretary in Kingston, Jamaica, June 3-14.

W. G. Roberts, Assistant Commercial Secretary in Sydney, Australia, June 10-14.

J. H. Suggitt, Consul and Assistant Trade Commissioner in Los Angeles, July 3-13.

J. D. Tennant, Assistant Commercial Secretary in Port-of-Spain, Trinidad, June 5-14.

J. M. T. Thomas, Commercial Counsellor to Vienna, Austria, June 10-14.

In Territory

Australia—W. A. McKenzie, Assistant Commercial Secretary in Melbourne, will visit the Kimberley and Pilbara mining districts and Perth and Kalgoorlie June 8-26.

Brazil—J. E. P. Lancaster, Commercial Counsellor in Rio de Janeiro, Brazil, will visit Recife during the second week of June.

Britain—W. G. H. Metcalfe, Commercial Assistant in Liverpool, will visit Manchester June 5.

Bulgaria, Czechoslovakia, Hungary, Romania—Trade Commissioners in the Vienna, Austria, office make frequent visits to these countries, but often there is not time to publish their itineraries in advance. Therefore, Canadian businessmen who would like the Trade Commissioners to undertake assignments for them in these East European countries are advised to write to the Vienna office immediately.

Thailand—A Trade Commissioner from Singapore will be making a monthly visit to Thailand throughout 1968. Correspondence should normally be addressed to the Singapore office although contact can also be made through the Canadian Embassy in Bangkok, P.O. Box 2090 (telex: 2277; cable: DOMCAN, Bangkok; phone: 32-956).

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

Foreign Exchange Rates

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

The mid market rates only are quoted, except when buying and selling rates are specified. The buyir rate is that at which banks purchase exchange from exporters; the selling rate is that at which banl 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 .92. To convert column two, *divide* by .92.

Country and Currency	Value of Foreign currency unit in Canadian dollars at May 10	Value of Canadian dollar in foreign currency units at May 10
Algeria		
Dinar	.2186	4.57
Argentina		
Peso (free)	.0031	322.58
Australia		
Dollar	1.203	.8257
Austria		
Schilling	.0417	23.98
Bahamas		
Dollar	1.057	.9364
Belgium and Luxembourg		
Franc	.0217	46.25
Bermuda		
Pound	2.578	.39
Bolivia		
Peso	.0906	10.97
Brazil		
Cruzeiro (official free)	.3865	2.98
Britain		
Pound	2.578	.39
British Honduras		
Dollar	.6445	1.53
Burma		
Kyat	.2265	4.20
Ceylon		
Rupee	.1812	5.47
Chile		
Escudo (bank rate)	.1636	6.11
(free)	.1413	7.07
China, Republic of		
New Taiwan Dollar (official)	.027	37.04
Colombia		
Peso (fixed)	.066	14.95
Congo, Republic of[1]		
Franc	.0072	139.50
Costa Rica		
Colon	.1628	6.10
Cuba[2]		
Peso	....	....
Czechoslovakia		
Koruna	.1498	6.64
Denmark		
Krone	.1445	6.81
Dominican Republic		
Peso	1.078	.92
Ecuador		
Sucre (official)	.0599	16.50
(free)	.0536	18.45
El Salvador		
Colon	.4314	2.31
Fiji		
Pound	2.477	.40
Finland		
Markka	.2568	3.88
France, Monaco, etc.[3]		
Franc	.2186	4.57
Franco-African Republics[4]		
Franc	.0044	227.79
French Pacific[5]		
Franc	.0120	82.64
Germany		
D Mark	.2711	3.68
Ghana		
New Cedi	1.057	.94
Greece		
Drachma	.0360	27.86
Guatemala		
Quetzal	1.078	.92
Guayana		
Dollar	.5392	1.85
Haiti		
Gourde	.2157	4.60
Honduras		
Lempira	.5392	1.85
Hong Kong		
Dollar	.1779	5.56
Hungary		
Forint (official)	.0921	10.86
Iceland		
Krona (official)	.0189	52.91
India		
Rupee	.1434	6.90

ountry nd urrency	Value of Foreign currency unit in Canadian dollars at May 10	Value of Canadian dollar in foreign currency units at May 10
ndonesia[6]		
Rupiah	....	....
ran		
Riai	.0143	70.42
raq		
Dinar	3.020	.33
reland		
Pound	2.578	.39
srael		
Pound	.3081	3.23
taly		
Lira	.0017	581.86
amaica		
Pound	2.578	.39
apan		
Yen	.0030	333.33
enya		
Shilling	.1526	6.55
ebanon		
Pound (free)	.3343	2.98
alaysia		
Dollar	.3523	2.82
exico		
Peso	.0863	11.47
orocco		
Dirham	.2131	4.65
etberlands		
Florin	.2978	3.34
etberlands Antllles		
Florin	.5719	1.74
ew Zealand		
Dollar	1.207	.82
icaragua		
Cordoba	.1541	6.42
igerla		
Pound	3.051	.33
orway		
Krone	.1510	6.57
akistan		
Rupee	.2265	4.38
anama		
Balboa	1.078	.93

Country and Currency	Value of Foreign currency unit in Canadian dollars at May 10	Value of Canadian dollar in foreign currency units at May 10
Paraguay		
Guarani (free)	.0086	116.28
Peru		
Sol (free)	.0259	38.02
Pbilippines		
Peso (free)	.2755	3.61
Poland		
Zloty (fixed basic rate)	.2695	3.68
Portugal & Colonies[7]		
Escudo	.0375	26.33
Saudi Arabia		
Riyal	.2066	4.84
Sierra Leone		
Leone	1.510	.66
Singapore		
Dollar	.3523	2.82
South Africa		
Rand	1.510	.66
Spain & Dependencies		
Peseta	.0155	64.25
Sweden		
Krona	.2085	4.77
Switzerland		
Franc	.2491	4.01
Syria		
Pound (free)	.2821	3.51
Thailand		
Baht (free)	.0523	18.90
Trinidad & Tobago[8]		
Dollar	.5392	1.85
Tunisia		
Dinar	2.054	.48
Turkey		
Lira	.1198	8.28
United Arab Republic		
Pound (official)	2.481	.40
United States		
Dollar	1.078	.92
Uruguay		
Peso (free)	.0043	232.55
Venezuela		
Bolivar (official free)	.2403	4.16
Yugoslavia		
Dinar (official)	.0863	11.47

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. Also used in Barbados, Leeward and Windward Islands.

Marketing Data Sheet

YUGOSLAVIA

Area

98,766 square miles.

Climote

Average temperature in Belgrade and Zagreb is 11°C and humidity 72 per cent. Average temperature in Split is 16.2°C and humidity 59 per cent. Centigrade scale is used.

Populotion

In 1961, the total population was 18.5 million. It had risen to an estimated 19.3 million in 1966.

Households

In 1966, there were 4.8 million residential dwellings with an average of 4.1 people in each.

Income

National income in 1965 was 73.6 billion new dinars. Per capita income was 3,771 new dinars and the average net hourly wage (after taxes, pension, etc. had been deducted) was 4.125 new dinars. (One new dinar equals 8.7 Canadian cents at the official rate.)

Retoil Soles

The total value of retail sales in 1966 was 36,974 million new dinars, 1,873 new dinars per capita.

Motor Vehicles

In 1966, there were 253,300 passenger cars, 9,800 buses, 70,100 trucks, 112,300 motorcycles and scooters, 7,400 special vehicles, 21,300 tractors, and 27,600 trailers.

Telephones

Approximately 20 per thousand persons.

Rodio ond Television

In 1966, there were 2.6 million radio sets and 777,300 television receivers. Broadcasting facilities are publicly owned.

Woter Supply

Safe to drink. Domestic water pressure averages 6 ats. (Details of mineral content for a particular place may be obtained from the authorities by filling out an official form. The address is: Savezni Zavod za Zdravstrenn Zastitu, Higijensko Odelenje, Beograd, Ulica Slobodana Penezica Bv.35.)

Electric Power

Fifty-cycle a.c. 220/380 volts one- and three-phase. Frequency is stable but voltage may vary 10 per cent. A grounding conductor is required in the electric cord attached to an appliance. Total power production at the generator in 1966 was 17.2 million kwh., 9.9 million hydroelectric and 7.3 thermal.

Cool

In 1966, production was 29.3 million tons (about 65 per cent of this was lignite) and consumption was 20 million tons.

Gos

Manufactured gas, LPG and natural gas are available.

Petroleum Products

All grades are available.

Weights ond Meosures

Metric. The yutro (1,422 acres) is also used for land measurement.

Screw Threod

Metric. Where necessary, Whitworth, North American SAE are used. Right hand.

Standords

For electrical appliances, official approval is mandatory and CEE standards are used. Standards for fuel oil appliances (YUS MR 4 101 SI 1-1968) are obtainable from Jugoslovenski Zavod za Standarizaciju, Beograd, Ulica Cara Urosa No. 54, POB 933, Yugoslavia, which is also the approvals organization for fuel and electrical appliances. Standards for gas appliances are being prepared and will be ready in 1968.

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