

AUGUST 3. 68

FOREIGN TRADE

DEPARTMENT OF TRADE AND COMMERCE, OTTAWA

**The
Lively Ones**



IN THIS ISSUE

VOL. 130 NO. 3

We spent a lively day in Valcourt in May gathering material for the article on the Ski-Doo people. It included a tour of the Bombardier plant, lunch with a number of its executives, several interviews, and a hitch-hiked ride back to Ottawa on the company's Jet Commander, on its way out to Minneapolis. It certainly gave us an insight into the sheer drive and efficiency of this export-oriented Eastern Townships company.

Poland was missed out when we covered other countries of Eastern Europe in our issue of January 20. We are repairing this omission forthwith with a special section on Poland, including a briefing for the man who wants to explore this market but is hesitating because he lacks information about it. The feature was prepared by our Copenhagen office, in whose territory Poland lies.

The Department's trade mission program has become one of its established trade-promotion techniques—a technique that has been adapted and enlarged as experience dictated. The picture story on page 13 highlights some of these missions hard at work.

Speak of Venezuela and most Canadians think of Caracas or oil-rich Lake Maracaibo. Less familiar is the area where the Orinoco flows to the sea and where the Spanish conquistadores once sought gold. Today it is yielding modern treasure—iron ore, hydro power, manganese, petroleum. It's the right place for companies with experience in developing Canada's potential to sell their goods or their expertise, as the article on page 28 shows.

One of our objectives is to keep the Canadian businessman posted on developments in transportation that may make it easier and faster for him to get his goods to foreign customers. That's why we are carrying a series of articles on containerization in major world ports. In this issue it's Sydney; later it will be Liverpool and Hamburg. You may have missed those on Tilbury (Aug. 19/67), Melbourne (Dec. 9), Singapore (April 13) and Antwerp (April 27).

FOREIGN TRADE

Established in 1904. Published fortnightly by the Department of Trade and Commerce.

The Hon. JEAN-LUC PEPIN, Minister; J. H. WARREN, Deputy Minister

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SUBSCRIPTIONS

\$5.00 a year in Canada, \$7.00 abroad.
Single copies 25 cents each.
Please forward all orders, with cheque or money order made out to the Receiver General of Canada, to the Queen's Printer, Ottawa, Canada.

The Lively Ones

The Ski-Doo, the "lively one", a Canadian brainchild, is made, promoted and sold in many countries by a company just as lively.

O. MARY HILL,
Editor, "Foreign Trade".

■ Valcourt, Quebec, seems at first glance an unusual setting for a big, export-minded enterprise. A village of some 1,500 people, it nestles in a valley in the Eastern Townships, 25 miles from Sherbrooke. Yet it's the home of an active, progressive company that produces the Ski-Doo (the "lively one"), the larger snowmobile, and tractors for use in muskeg, snow, heavy clay or even desert. Bombardier Limited is still a family-owned business, founded on the inventive genius of Joseph Bombardier, who ran a garage in Valcourt in the thirties and who produced the first practical snowmobile after 12 years of patient experimentation.

Though Bombardier still paces the field, it holds no monopoly of the world market for snowmobiles. North America has 42 companies turning out various models; 15 of these firms operate in Canada and seven of them in the Province of Quebec. Swedish plants are supplying European customers and moving into other markets. But by keeping ahead in product design and adopting a sales policy equally streamlined, Bombardier is able to boast that its sporty Ski-Doo, first put on the market in 1959-60, outsells every other make by four or five to one in both Canada and the United States. Some 60 per cent of Ski-Doo production goes to the United States.

Keyed to Moderns

What's the secret? A visit to the main plant in Valcourt suggests that it is modern management techniques allied with products keyed to the modern milieu. Bombardier executives fly to distant appointments in the company's *Jet Commander*. Lined up in the company yards are big trucks from many states in the Union, picking up completed machines to be conveyed to U.S. distributors. The reception area is as modern as Expo 67. One wing of the plant houses a computer that keeps track of inventory and sales and will eventually be hooked up with the company's distributors throughout North America to provide an "instant inventory" and avoid back-ordering of parts by dealers. Bright yellow Ski-Doos move along an assembly line much as automobiles do at Ford or General Motors. Other sections of the plant turn out the heavier snowmobiles and industrial tractors. And this is only one of the three Bombardier factories: the two others, in villages close by, make the rubber parts, tracks, etc., and the fiberglass components, such as the front cabin of the Ski-Doos, the backrest and pulley guard.

The two-way concept of foreign trade is more than a cliché with the Bombardiers. The engines that go into the Ski-Doos, ranging from 12 to 40 horsepower, are all turned out in a plant in Austria. Why? Because in the view of the Bombardiers, this Rotax

brand is the best possible two-stroke engine, and they have contracted for over 65 per cent of the plant's output.

The original snowmobile came onto the market largely as a workhorse; the first buyer reportedly was a priest who used it to visit his scattered flock when snow blocked the roads. It became popular for official use up north, where it began to displace the team of huskies. (One Northern Affairs official has recorded seeing a Ski-Doo on the trail recently and riding contentedly behind it a bright-eyed dog team—a unique form of transportation insurance!) But with the arrival of the smaller Ski-Doo and the introduction of snowmobiling as a winter sport, the company began to distinguish the market for the Ski-Doos from the market for the workaday snowmobile and industrial equipment.

Marketing Set-up

Key people in the marketing set-up for Ski-Doos in North America, Bombardier believes, are the distributor and his dealers. The company selects them with great care and gives them maximum support. Today it has 17 distributors who in turn have 2,000 dealers—1,300 of them in the United States, chiefly in the snow belt that stretches across 39 states. Each year the company puts on a major sales meeting for both distributors and their sales personnel. This year the locale chosen was West Yellowstone, where sales sessions, Ski-Doo tours on the 1969 models, and other events kept

things swinging. Last year the rendezvous was the hotel Schloss Fuchl in Austria. Directly after this event, the dealers place their orders. Senior company personnel then carry the message for the coming year across the country in a series of 25 to 30 regional dealer meetings.

The enthusiasm generated at these gatherings is backed up by year-round support. There is a finance plan, for example, through which Bombardier pays the cost of the dealer's finance charges on his inventory from May 1 to November 1. The dealer's own sales efforts are buttressed by extensive advertising produced imaginatively and consistently. The company makes full use of modern media—television, full-color ads in sports and family magazines, radio, newspapers and trade fairs. Its public relations techniques include the production of a comprehensive safety booklet and films that the dealer can use and attendance at special events, including snowmobile races. One of the events that attracted a fantastic amount of publicity this past winter was the Plaisted Expedition to the North Pole. This expedition, using four Ski-Doos, travelled 825 miles

across the pack ice to the geographical North Pole—the first overland journey since Peary's in 1908. (One member of the expedition was Jean Luc Bombardier, nephew of the founder.) Although the expedition was financed by 42 different companies which provided food or equipment, Bombardier played a major role. In addition to the publicity, the journey yielded valuable information about the ruggedness of the Ski-Doos and about problems of operating them in extreme temperatures.

Two Major Campaigns

With the help of its advertising agency, Bombardier mounts two major advertising campaigns for the Ski-Doo in North America each year. One is pre-season, during July and August; a second and massive one runs through October, November and part of December, and includes use of prime television time during the evening, preferably following the news or sports roundup. Magazine advertising consists usually of page ads in full color in mass magazines like *Life* and *Look* as well as special ads in sporting magazines like *Outdoor Life* or those that appeal to the male, such as

Argosy. Copy is slanted to the hunter, the fisherman, or the family man, depending on the periodical selected. "Television advertising," says one of the firm's marketing men, "is an excellent medium to demonstrate the fun of Ski-Doo; advertisements in sports and trade magazines, on the other hand, produce a good many direct inquiries which are passed on to local dealers."

Dealers are encouraged to do local advertising and many of them make good use of radio. Bombardier provides a basic script and the dealer pays for the time only. For local newspaper or magazine advertising, it forwards mats, and it also supplies material for TV commercials. Billboards too are used.

The emphasis on obtaining and retaining capable dealers motivates Bombardier's participation in trade fairs in the United States. This has proved to be one of the best methods of contacting good dealers and getting them interested in taking on the line. "Trade fairs are used," says its P.R. manager, "to fill in blanks in the dealer organization, to upgrade dealers, and to promote the corporate image." Bombardier's first appearance



This Muskeg tractor resembles its Ski-Doo cousin in its ability to travel where other vehicles fear to tread. It can carry payloads of up to 6,000 pounds over rough terrain, swamps, or soft soil. It handles many jobs in many parts of the world; this one is doing duty as a fire-fighting unit in rural Switzerland.

as an exhibitor was at the National Sporting Goods show at Chicago in 1964, as part of the Canadian display organized by Trade and Commerce. Now it enters fairs on its own and this year's program includes exhibitions at Houston (Texas), Anaheim (California), Chicago, and New York.

Enter the Sea-Doo

The company policy of keeping its dealers selling and satisfied led this year to the introduction of the Sea-Doo, a jet-powered aqua scooter, cousin to the Ski-Doo. Introduced to give dealers a line to handle in the Ski-Doo's off-season, it was unveiled to 700 of them who were flown down to Florida for the occasion last winter. Propellorless and able to operate in ten inches of water, the Sea-Doo is chiefly a fun craft, though it can be used for fishing or pressed into service by lifeguards. It resembles its winter cousin in more than name: it uses the same type of engine and the same components. This year it is being introduced in Central Canada and the United States, with intensive test markets in Ontario and Quebec. Eventually it may mean drawing dealers in marine products as well as those already in the snowmobile business into the Bombardier circle.

For the Snowmobile Safari

The man who buys a Ski-Doo from a dealer today is offered not only a machine but also the appropriate togs for a snowmobile safari—from the skin out. He can head for the frozen open spaces in a warm jump suit donned over special underwear, and wearing gloves and other accessories suited to the sport. He can even add saddlebags and a flare gun. The snowmobile clothing is made by a Bombardier subsidiary in Montreal and is selling well because of quality, novelty, and good advertising—advertising that stresses style, comfort, and warmth. Going into the U.S., this clothing is charged duty but it still sells well. (The Ski-Doo's themselves move across the border duty-free under the Canada-U.S. Automotive Agreement.)

Selling to Europeans

Marketing the Ski-Doo in Europe calls for a different approach. There the snowmobile has been welcomed

to date largely as a workhorse, as it was originally in Canada. The Lapps insist that it has changed their whole way of life; they take to Ski-Doo's to round up the reindeer herds and can move quickly back to home base instead of camping out on the frozen tundra. Now the idea of snowmobiling as a sport is slowly taking hold, especially among the Swedes.

This trend has encouraged the Bombardiers to make a concerted attempt to move seriously into the European market. Step one, this summer, is the establishment of a resident European sales manager based in Stockholm. One of his first jobs will be to establish a good network of dealers. He will also promote the use of Ski-Doo's for sport by arranging Ski-Doo races and by helping agents put on good displays at trade fairs. The company sees its best markets in Europe as Sweden, Finland and Norway; it has made some sales in the mountain areas of Austria and Switzerland and a few in the skiing resorts that are springing up in Scotland.

With the setting-up of the Stockholm office, the company is changing its production system for Europe. Up to now, Ski-Doo's sold in Europe have been assembled under licence in Vienna. Now complete Ski-Doo's will be shipped directly to European customers from Valcourt. The reason for the change, the company explains, is to assure strict quality control.

Increasing European sales won't be easy because of stiff Swedish and other competition. Then too, the Ski-Doo still has to be sold as part of the winter sports picture. The Norwegians, for example, don't want their cross-country ski trails disturbed and they don't like the noise that shatters the winter peace. The Swedes and Finns are more receptive. Selling the dealer on taking on the line is often harder than getting orders from customers. One of the Bombardier executives with extensive experience in Europe is convinced that in acceptance of North American merchandising methods, the average consumer is well ahead of the average distributor and that it is time the latter caught up.

The Big Guys

The Bombardier line contains big guys as well as small lively ones. These too are gaining yards in export

markets. Take the Muskeg tractor—a tracked vehicle that sells for about \$7,000 and tackles tough jobs in 35 countries. In Scandinavia it is used as a log skidder or log carrier; in Holland, it helps in dyke-building; in Scotland it is used for laying pipelines, and in Australia it has been pressed into service as a gun carrier in the outback. Peru has discovered it is the one vehicle that can handle heavy logs in the Amazon area, where the soil is thick clay under a thin coating of topsoil. In Central America, coffee plantation workers use it to reach inaccessible spots, and the Hungarians bought a number to harvest reeds in swampy country. Bombardier asserts that it holds about 50 per cent of the market for this particular type of tractor, originally developed for oil-exploration work in Western Canada. About 80 per cent of production is sold in North America and about 20 per cent in all other markets. In promoting the logging tractor in the U.S., Bombardier makes good use of lumber shows.

A Lively Future

What's ahead for this go-go Quebec company? Probably still larger sales for the Ski-Doo's in North America (as families not in the snow belt discover that the versatile little machines can be taken by trailer north to where snow lies thick on the ground), a new market opening up for the Sea-Doo among the boating fans, and a steady demand for the heavy-duty tractor. And happenings, both planned and unplanned, that promote an image of Bombardier Limited as the "lively one"—just like its most famous product.

Here's an example. Last winter a band of Navajos became snowed in after one of the worst blizzards to visit Arizona in a century. A Bombardier distributor in Denver, Colorado, suggested that the Ski-Doo could make it to the trapped men. A U.S. Government plane picked up a dozen of the *Alpine* model and sent them triumphantly through the drifts to reach the stranded Navajos. After all, haven't snowmobiles rescued many a storm-stayed motorist in the depths of the Canadian winter?



Poland in Brief

Area: 120,000 square miles.

Population: 32,000,000 in 1968.

Climate: warm summers and cold winters.

Language: Polish.

Currency: zloty; 100 groszy=1 zloty. At the official rate, 1 zloty=Cdn.\$0.27. There are special exchange rates for tourists.

Weights and measures: metric system.

Electric supply: 50-cycle a.c. 380/220 volts.

Capital: Warsaw.

Principal cities: Warsaw (population in thousands) 1,283; Lodz 750; Crakow 540; Wrochlaw 487; Poznan 447.

Chief ports: Szczecin, Gdynia, Gdansk.

Economy: since the war, has changed from an agricultural to an industrial base. In 1966, industry and construction accounted for over 60 per cent of national income, agriculture and related services for less than 10 per cent. The socialized sector accounts for 77 per cent.

Agriculture: produces some 20 per cent of national income and supports 38 per cent of the population. Grains (rye, wheat, oats and barley) occupy half the arable land, potatoes about one-fifth. Livestock includes 10 million cattle, 14 million pigs, 3 million sheep and 2.5 million horses. About 85 per cent of arable land is in small private farms. A modernization and land consolidation program is under way.

Industry: based on local coal, copper, rock salt and sulphur. Important and diversified machine building industry, expanding chemical industry. Other major industries are foodstuffs, coal, clothing and textiles, iron and steel, wood products, building materials, and non-ferrous metals.

Total Polish imports: (million currency zlotys) 1964—8,289; 1965—9,361; 1966—9,976; 1967—10,579.

Chief imports: (million currency zlotys) 1967—machinery and equipment 3,911; fuels and raw materials 4,915; agricultural products and foodstuffs 1,157; consumer goods 596.

Chief suppliers: (million currency zlotys) 1967—U.S.S.R. 3,684; East Germany 1,168; Czechoslovakia 941; Britain 712; Hungary 416; Italy 262.

Value of imports from Canada: 1966—Cdn.\$37.4 million; 1967—Cdn.\$25.8 million.

Chief imports from Canada: (Cdn.\$ million) 1967, wheat 20.0; zinc ore and concentrates 1.7; asbestos 1.2; cattle hides 0.7; alfalfa seed 0.2.

Total Polish exports: (million currency zlotys) 1966—9,088; 1967—10,106.

Chief exports: (million currency zlotys) 1967—machinery and equipment 3,645, fuels and raw materials 3,336, agricultural products and foodstuffs 1,569, consumer goods 1,556.

Chief markets: (million currency zlotys) 1967—U.S.S.R. 3,607, Czechoslovakia 811, East Germany 703, Britain 591, West Germany 425, Hungary 454.

Value of Canadian purchases: 1966—Cdn.\$13.8 million; 1967—Cdn.\$15 million.

Chief Canadian purchases: (Cdn.\$'000) 1967—fabrics 3,154; clothing and footwear 1,824; fruit, canned, frozen, preserved 533; bed sheets 1,134; concrete reinforcing bars 191; carbon steel plate 1,077.

Prices: quote in U.S. or Canadian dollars, f.o.b. Canadian port and c.i.f. Baltic port.

Terms of payment: negotiated according to commodity and competitive position.

Samples: must be declared on arrival and entry form produced on departure; bond and/or an undertaking to export samples within a stated period may be required.

Visa: visa is required.

Inoculations: not required.

Trade agreements: Poland recently became a member of GATT.

Official holidays: New Year's Day, Easter (two days), International Work Holiday (1st May), Corpus Christi Day (one Thursday in May or June), National Holiday (22nd July), All Saints' Day (1st November) and Christmas (25th and 26th December).

Foreign exchange and import regulations: licences are issued by the Ministry of Foreign Trade and are required for all import and export transactions. Foreign trade is a state monopoly.

Documentation, tariffs, marking and labelling: consult Office of Trade Relations, Department of Trade and Commerce, Ottawa.

Correspondence: English, German, French and Russian acceptable. Use airmail only; letters 15 cents for each half ounce.

Advertising: direct all inquiries about advertising, direct mail posters, etc., to AGPOL, Foreign Trade Advertising Agency, Sienkiewicza 12, P.O. Box 136, Warsaw.

For detailed information on this market write to:

European Division
Office of Trade Relations
Department of Trade and Commerce
Ottawa

or

Commercial Counsellor
Canadian Embassy
2 Princesse Maries Alle
DK—1908 Copenhagen V.
Denmark

As a full member of GATT, Poland has undertaken to step up its imports from GATT countries by seven per cent a year.

Canadians might share in this increase if they can cater to Polish needs.

The Potential Market in Poland



This was Canada's Pavilion at the 36th International Fair in Poznan, Poland, in June 1967. Poznan attracts up to 450,000 visitors; this year's fair was also held in June.

JOHN M. HILL, *Assistant Commercial Secretary, Copenhagen.*

■ Canadian manufacturers have not traditionally devoted much attention to the potential market for their products in Poland. This is partly because they have had difficulty in defining and assessing the present and potential market, and partly because they have had little experience in the techniques of doing business with countries that have centrally planned economies. This situation is reflected in the size and the composition of Canadian trade with Poland. Raw materials dominate our exports to that country; wheat is in the lead, but we have also sold zinc concentrates, asbestos fibers, copper, and synthetic fibers. Polish sales to Canada have gone up considerably; they consist of an increasing range of consumer and industrial goods (Tables I and II).

To produce goods for export as well as to supply its own needs, Poland must import both oil and raw materials. It also continues to buy abroad technically advanced machinery from both Western Europe and other areas. In 1966, its exports, mainly of agricultural and consumer products, were not large enough to balance its trade and the over-all deficit totalled U.S.-\$222 million. The course of industrial development dictates that imports of essential raw materials, fuels, and advanced machinery and equipment will continue to receive priority. Moreover, the chronic trade deficit with the West leads to economic pressure to both increase exports and to import only those products of a critical nature.

Looking at Industry

Canadian exporters can get some idea of the structure of the Polish economy and the products it might need by noting the relative size, growth rates, and investment inten-

tions of the various industrial sectors. (Comparative figures or rankings have been set in most instances; this avoids the problems encountered when trying to compare meaningfully amounts in non-convertible currency, such as the Polish zloty, with those from convertible currency countries.)

Table III A (page 8) lists the ten largest industries. The first four might be called the basic ones. The foodstuffs and textile industries are basic for serving the Polish population but have also achieved success in exports. Mining has been a traditional Polish export industry and coal exports continue to be one of the major sources of foreign exchange. The ferrous metals industry too is important. However, as total Polish industrial production expands, the share of these four industries in total production declines. In 1950 food, textiles, coal and ferrous metals accounted for 68 per cent of Polish industrial production. By 1966 this share had fallen to 43 per cent. During the same period the share of the next six largest industries rose from 16 to 39 per cent.

In the 1960-66 period, the output of the electro-technical, chemical, transportation equipment and machine-building industries doubled. At the start of the 1966-70 Five Year Plan, it was estimated that these four would continue to be the fastest expanding sectors of Polish industry with a 60 to 80 per cent increase in output over the period (see Table III B). Canadians should note that the non-ferrous metals industry will expand rapidly over the next five years and will replace the clothing industry as one of the top ten.

It is not surprising that the leading growth industries are also the leading recipients of investment expenditures. Considerable investment is also made in the traditionally large but slower growth sectors, such as foodstuffs, textiles and fuel.

These paragraphs give some idea of the nature and direction of Polish economic expansion. But an over-all economic survey, however detailed, does not uncover or, under a state-controlled trading system, necessarily even give any indication of the areas of possible import interest. The Canadian businessman may gain some idea of these by examining some of the targets in the annual economic plan.

TABLE I
WHAT CANADA SELLS TO POLAND

	1963	1964	1965	1966	1967
	(Cdn.\$'000)				
Durum wheat, except seed	—	7,915	5,790	6,269	4,397
Wheat except seed	18,368	47,436	16,069	22,113	15,586
Cattle hides, raw	162	324	586	2,614	739
Rapeseed	—	—	1,276	—	—
Synthetic fibers & waste	4,672	955	—	2	—
Zinc in ores and concentrates	128	4,404	5,358	3,194	1,659
Asbestos milled fibers grade 3	317	—	77	525	136
Asbestos milled fibers grades 4 & 5	49	40	1,038	1,880	1,060
Sulphur crude and refined	—	276	556	—	515
Copper refinery shapes	2,361	599	—	—	—
Total, these products	26,057	61,949	30,751	36,597	24,092
Total trade	27,200	62,653	31,565	37,404	25,790

TABLE II
WHAT CANADA BUYS FROM POLAND

	1964	1965	1966	1967
	(Cdn.\$'000)			
Meat and meat preparations, canned	320	264	342	600
Strawberries, frozen	195	542	291	32
Fruits in liquid	649	716	671	373
Fruits and products, canned	88	303	229	93
Fur skins, fox	2	280	131	554
Worsted fabrics, all wool	438	218	191	52
Print cloth & sheeting, cotton, unbleached	12	3	104	122
Print cloth & sheeting, cotton, bleached	288	212	309	359
Print cloth & sheeting, cotton, colored	184	297	234	356
Flannel napped fabric, cotton, unbleached, bleached	516	570	611	624
Flannel napped fabric, cotton, colored	185	198	198	250
Corduroys, cotton	33	230	350	266
Pile fabrics, cotton	—	46	299	1
Rayon broad woven fabrics	71	274	363	579
Concrete reinf. bars carbon steel	20	430	1,006	191
Wire rods, steel, hot rolled	—	110	—	—
Nuts, lock nuts and stop nuts	30	85	280	83
Metal boring drilling machinery & parts	40	174	108	120
Lathes, metalworking and parts	38	57	212	237
Bicycles	213	182	129	542
Brooms and whisks	165	114	112	221
Pants & breeches, men's & boys', cotton	58	81	130	143
Shirts, cotton, except knitted	383	210	246	167
Sweaters	163	229	114	137
Shirts & sweatshirts, knitted cotton	139	277	237	428
Boots & shoes	28	57	347	284
Waterproof rubber footwear	110	346	179	283
Bedspreads, textile	123	211	147	218
Sheets, bed, except rubber	517	670	1,014	1,134
Towels, cotton	79	65	117	139
Towels, linen	353	343	129	218
Tableware, glass	113	201	183	186
Total, these products	5,543	7,996	9,016	8,989
Total trade	9,280	11,815	13,757	14,982

TABLE IIIA
SELECTED POLISH ECONOMIC SECTORS

Sector	Gross Production 1965	Total Share of Gross Output		
		1950	1966 (per cent)	1970
Foodstuffs	201.5	32	19	17
Textiles	71.0	10	8	8
Fuel	63.6	16	8	7
Ferrous metallurgy	59.9	9	8	7
Transport equipment	58.4	3	9	10
Chemicals	54.5	4	9	10
Machine building	44.6	2	7	8
Metals	35.5	2	5	5
Electrotechnical	32.6	1	5	6
Wood	28.0	4	4	3

TABLE IIIB
BY GROWTH RATES 1960-66

	Relative Size 1965	Projected 1970/1965 Growth	
		Index	Ranking
Electrotechnical	9	167.7	2
Chemical	6	179.7	1
Transport equipment	5	162.6	3
Machine building	7	160.2	4
Metals	8	155.5	6
Glass	18	150.0	9
Rubber	17	158.4	5
Electric power production	13	148.1	10
Clothing	11	146.0	11
Porcelain	20	152.4	8

Examining the Plan

There are two types of economic plan in Poland. The Five Year Plan sets out the targets for that period and the economic implications of achieving these goals. The annual plan gives specific targets for the coming year and updates those targets for the following year. The plans are the result of extensive forecasts for virtually all sectors of the economy and are based on data which a potential exporter would find interesting and useful. Little of this information, however, is published. The published plan gives some information on the objectives of economic policy and these may suggest opportunities for the sale of goods, services and technology.

The latest annual plan contains a number of items with which Canadian industry is familiar. Here's a sample:

- Some 659,000 and 860,000 meters of geological prospecting drilling will be undertaken in 1968 and 1969.

- Gas pipelines and distribution plants will be built.

- Manufacture of agricultural and forest industry equipment will rise by 7 per cent in 1968 and 11 per cent in 1969.

- Tire production will increase by 18 per cent in both 1968 and 1969.

- Furniture style, utility and quality will be improved to satisfy local and foreign demand.

- About 58,000 telephone subscribers will be added in 1968, bringing the total to 954,000.

The plan also examines the need for development in industrial technology. In some instances the source of the new technology may be a foreign company which has entered into a licensing agreement. The current annual plan, for instance, calls for the development of:

1. Precision die casting, centrifugal casting and shell casting.

2. Semi-conductor instruments.

3. Precision machine tools, active control grinders and superfinishers.

4. Automatic computer control in sectors of the chemical and steel industries.

5. Increased multiple use of telephone cables.

For some foreign businessmen, doing business in Poland is a matter of offering quality goods at competitive prices and awaiting Polish evaluation of various offers. For others, it is a complex transaction involving sharing of technological expertise, agreements about marketing in third countries, joint production of certain lines, and other arrangements.

Under the Polish economic system the responsibility for importing and exporting is vested in some 40 foreign trade enterprises. These organizations, each with a monopoly over a certain range of products, buy and sell on behalf of the industrial amalgamations (the producing and consuming units). Canadian manufacturers will recognize that the foreign trade organizations have a similar role to that of a Canadian company's sales force and purchasing organization.

Can Canadians Participate?

In recent times two factors have been bringing the Polish market increasingly to the attention of Canadian exporters.

There has been a growing awareness of both the trade potential offered by all Eastern Europe and the gradual introduction of economic reforms which will enable sellers and end users to communicate more directly. Exporters are also beginning to notice that other countries are making good sales, that travelling and doing business in Poland, either individually or on a trip sponsored by government or a Chamber of Commerce, is not as complex as it was once thought to be, and that there are sources of information and guidance both private and public to which they can turn when confronted by the unfamiliar techniques that are part of Eastern European trade.

Canadian businessmen are also becoming more aware of developments within the Polish economy itself. They recognize that Poland, the largest Eastern European country, with over 30 million people, has shifted from an agricultural to an industrial base and has become a leading exporter of ships and of a wide range of machinery and equipment. It has recently become a full member of GATT and has undertaken to increase collective imports from member countries of the GATT by 7 per cent annually. A series of advertisements placed in Canadian financial publications by the Polish Chamber of Foreign Trade

dramatically illustrated the specialization and sophistication of Poland's new industries. Canadian consumers have noted the increasing number of Polish goods on the Canadian market and a Polish organization is actively engaged in feasibility studies for a potash development in Western Canada.

The principal problem in trading with Poland is, of course, the non-convertibility of the zloty and the shortage of convertible currency. Businessmen must recognize that although their products may be ideally suited to Polish use, foreign exchange considerations may often result in

pressure for them to accept at least partial payment in the form of Polish goods.

See for Yourself

It is an axiom in export business that sellers must be prepared to visit potential markets to sound out leads, establish contacts, examine the most appropriate way in which to do business, and assess the possibility of concluding agreements. This axiom is even more important in a state-trading country like Poland where, with a few exceptions, a visit to the market is a virtual necessity for establishing any viable business connection. European businessmen have achieved considerable success as a result of an extensive, continuing program of market exploration, done on the spot by interested companies.

The Department of Trade and Commerce is anxious to assist Canadian exporters who wish to investigate the Polish market. The Office of Trade Relations, Department of Trade and Commerce, Ottawa, can provide background advice on business conditions, trade patterns, and methods of doing business. Exporters should contact the Commercial Counsellor in Copenhagen, outlining their products and sending product brochures and descriptive material. The Commercial Counsellor can then give preliminary advice on the market potential in Poland and the desirability of including it in their next European itinerary.



The busy port of Gdansk, at the mouth of the Vistula, one of the three Polish ports on the Baltic, was formerly known as Danzig. In the foreground are fishing trawlers; Poland is one of the world's big exporters of fishing units.



JOHN M. HILL, *Assistant Commercial Secretary, Copenhagen.*

A Business Visit to Poland

. . . could easily be included in your European itinerary and could result in helpful contacts with the state-run foreign trade enterprises and an appraisal of their needs.

■ An increasing number of Canadian businessmen will visit Poland in 1968. They may travel as members of a group organized by their Board of Trade, as members of a government-sponsored mission, or as individuals who have added Poland to their European itinerary. The advice on visiting Poland contained in this article will prove particularly helpful to those who are "going it alone", following a preliminary assessment of the market by the office of the Trade Commissioner in Copenhagen, who also looks after Poland. If this assessment shows some potential for selling your product to the Polish foreign trade enterprises, then a visit to establish personal contacts and assess the situation at first hand is the next step.

When

Virtually any time of year is suitable for a visit to Poland. You may not be able to make the full range of contacts during the summer because this is the traditional vacation period. A visit to the Poznan Fair, held each June, should be planned well in advance as reservations are virtually impossible to get on short notice. Poznan offers the opportunity to examine a wide range of Polish and European goods and to make numerous business contacts. However, unless you are exhibiting your products at the Canadian Pavilion, it may be more effective to make an initial sales presentation away from Poznan. You will then have greater assurance of contacting the appropriate officials under less hectic conditions.

How

Poland is easily reached by air from major European centers and can be included in a Western European itinerary or as part of a sales campaign in Eastern Europe. Your travel agent will make hotel reservations before

your arrival because your application for a tourist visa for Poland must be accompanied by a voucher indicating that you have paid for your accommodation and board. Per diem cost for hotel and food is about \$15.00.

The Polish travel agency ORBIS runs the larger hotels. The following are recommended:

Warsaw: Hotel Europejski
Hotel Grand
Hotel Bristol
Katowice: Hotel Monopol
Lodz: Hotel Grand
Poznan: Hotel Merkury
Gdansk: Hotel Monopol

The local ORBIS travel office can arrange any local travel by air, rail or hired car that may be necessary during your visit.

Where

The majority of business visitors spend most of their time in Warsaw, Poland's capital city, 85 per cent destroyed during World War II but now reconstructed and enlarged. Warsaw is the principal center of government, trade and business; the various Ministries, industrial associations, the Chamber of Foreign Trade, and most of the foreign trade enterprises are located there. Canadian exporters who want to contact the textile and leather trade should visit Lodz, Poland's second largest city; Katowice in the Upper Silesian area is the center for mining equipment and heavy industry.

Who

The Commercial Counsellor at the Canadian Embassy in Copenhagen can tell you the appropriate foreign trade enterprises to contact once you inform him about your visit. He can arrange appointments before your arrival if he knows the details of your itinerary a week or two in advance. The Foreign Relations Division of the Polish Chamber of Foreign Trade, Trebacka 4, Warsaw, (Tel.: 26-02-21) can also give you information and arrange appointments. Currently there is no commercial officer at the Canadian Em-



In the heart of Warsaw lies the Castle Square and stretching ahead is Nowy Swiat Street. Today the city has over 1.2 million people. It is a must for business visitors because the majority of the Polish foreign trade organizations have their headquarters there.

bassy in Warsaw, but officials there will give you every possible assistance.

On Arrival

When you cash a travellers' cheque at the airport you should file away your exchange receipt because you will need to produce it whenever you cash cheques and when you leave the country. Depending on the length of your stay and your style of living, your need for cash will probably be small, because you will prepay your hotel accommodation and minimum food vouchers. You should carry small-denomination travellers' cheques and cash them as you need them because you cannot change zloty into convertible currency on your departure. When you have cashed travellers' cheques to the equivalent of U.S.\$50 or more, you are entitled to receive an additional 16 zloty per U.S. dollar in the form of ORBIS coupons, which effectively raises the rate of exchange from 24 to 40 zloty per dollar. These coupons can be used in ORBIS hotels and the principal shops. Some businessmen have noted a scarcity of small change; you should

try to keep a supply on hand for everyday use.

Your Business Day

The foreign trade enterprises work from 7:30 a.m. to 3:30 p.m. and you may find that your appointments begin at the crack of dawn. Rise early—other businessmen do and late risers may find the cafeteria and room service monopolized. Eat a solid breakfast because meetings can be delayed in starting and may last longer than you expect. It is not unusual for Polish officials to work through the day without taking a break. You may find yourself at one o'clock firmly seated at a conference table with no prospect of luncheon and with only coffee and Polish cognac to keep you going.

As you leave the hotel, ensure that the addresses of your appointments are clearly written or printed on a slip of paper. Most foreign trade enterprises are centrally located, but local cab drivers do not know them very well. When you have arrived at your destination, either hold your taxi or try to determine from the

driver where the nearest taxi stand is. This is an important first step to making your next appointment on time. Warsaw taxis will seldom stop if flagged down between stands; other vehicles sometimes will and two Canadian businessmen recently found themselves being chauffeured gratis to their hotel in an ambulance!

Introducing Yourself

Arrived at your destination, present your business card and the name of the Polish official you are to see. The hall porter usually will escort you to a small conference room. Don't be surprised if you are met by two or more officials. Following the traditional exchange of business cards and welcoming cup of coffee, the floor will be yours.

At the outset you might explain who you are, what your position is, and the nature and background of your company's business. An adequate supply of product brochures and technical specifications, with f.o.b. Canadian port and c.i.f. Baltic port prices, are essential for the Polish officials. If your product has various applica-

tions, you should spell out in detail who are the end-users, to ensure that your literature is directed to the appropriate people. A brief comment on the success of the product internationally will also be of interest.

On the completion of your presentation, your direct marketing effort ends, because it is up to the foreign trade enterprise to see that the various end-users have the opportunity to assess your products and to indicate their interest. This can be a time-consuming process and you should not expect to hear more for some time. When you finally receive a reply you may find that it is too general to give you a definite idea of where you stand. Given a reasonable indication of interest, however, you can overcome this problem by resolving to visit the market within six months in order to impress on the officials that you are seriously interested in doing business and to continue your probing. It is still not easy for foreign businessmen to contact end-users directly but this is often a desirable step. You should point out your interest in doing so on every possible occasion.

Direct exposure to the business environment will bring the problems and prospects your company faces in Poland into focus. On the basis of your initial visits, you may wish to consider other promotion techniques, such as technical symposia, advertising, etc. Readers should refer to *Foreign Trade*, January 20, 1968, for a full discussion of promotion techniques applicable to Eastern European markets.

For Relaxation

Visitors will find that the hotels in the major centers offer fairly complete entertainment facilities. These hotels are patronized by Western European businessmen and you may well be able to benefit from learning about their problems and experiences.

Shoppers will find handicraft, artwork, and antiques of interest; Desa and Cepelia are the two major shops for these items. There is an advantageous rate of exchange on some art objects. Leather and woven textile goods also deserve attention.

Poland recently celebrated its millennium and visitors will soon become aware of the place which art, history,

and culture play in Polish life. Visitors to Warsaw should visit the old town market square, which has been painstakingly rebuilt, go to the Opera, and stroll along the "Royal Route". The gem of Poland is the mediaeval city of Cracow, undamaged from recent wars. The city is of historical and architectural interest as well as a treasure-house of painting, furniture, and tapestry. Close to Cracow is Zakopane, the ski center of Poland, and the commemorative museum at Auschwitz. Visitors will also enjoy a visit to Gdynia and Gdansk on the Baltic coast.

Check-in time at the airport is one hour before flight time; although some seasoned travellers cut down on this considerably, you are running some risk because there are various formalities to be completed before departure (currency, visas and passports, customs).

When you are back at your desk in Canada, drop a note to the Commercial Counsellor, Copenhagen. He will be interested to learn of the progress you made and will be anxious to do anything he can to follow up your export efforts during one of his regular trips to Poland.

Poland Modernizes Its Ports

■ Poland has three Baltic ports that serve ocean shipping. Within the last ten years their facilities have been improved and today they handle almost twice the seaborne trade of ten years ago. The largest, Szczecin (formerly Stettin) is located at the mouth of the Oder River, which forms the country's western border at the Baltic. Gdynia and Gdansk (formerly Danzig), near the mouth of the Vistula, rank next in importance. The cargo handled at these ports has risen steadily in the past decade from 16.9 million to 28 million tons (including transit) in 1967 and accounts for about one-third of Polish foreign trade.

Virtually ice-free, these ports operate 24 hours a day throughout the year, except for specified port holidays. All of them have developed extensive facilities. In addition to the customary transit and bulk storage facilities, there is storage for perishables, explosives, and other freight requiring specialized treatment. The quays are equipped with high-capacity handling equipment, both stationary and mobile, including floating cranes with up to 100-ton lifting capacity at Gdansk, numerous mobile cranes, forklift trucks, conveyor belts, tractors, trucks, and locomotives. Palletized cargo shipments are used extensively and containerization of general cargo is coming in. Docking facilities include a bulk cargo terminal at Gdynia capable of accommodating tankers of over 100,000 tons.

In addition to cargo handling and ship repairs, Polish ports offer other essential services. International forward-

ing is carried out by C. Hartwig Ltd., sole licencees in Poland for freight forwarding by land, sea and air. The Polish Ocean Lines and the Polish Steamship Company provide ocean liner and tramp service, and chartering of Polish and foreign carriers can be arranged through the Polfracht ship brokering and chartering enterprise. Also licensed to operate as ships' agent in Polish ports is the Morska agency, which represents over 50 foreign lines. Cargo superintendence is undertaken by three firms and quality control of agricultural and mineral exports by the Quality Inspection Office established by the Ministry of Foreign Trade.

An important adjunct to the cargo handled at Polish ports is transit movements to and from Central Europe, particularly Czechoslovakia. In the past few years this traffic has approximated 4½ million tons, about twice the figure of a decade ago. Incoming shipments of ore, grain, fertilizers and other bulk goods make up two thirds of this transit movement. Poland's best transit trade customers, after Czechoslovakia, are Hungary, East Germany, Austria, and the Soviet Union, in order of importance.

Port authorities expect a further increase in tonnage handled in 1968 of 5 per cent over 1967, plus some changes in the composition of cargoes. Outbound shipments of machinery, industrial plant and manufactured consumer goods are expected to go up by 10 per cent, a reflection of the country's expanding industrial base.

—W. R. HICKMAN, *Commercial Counsellor, Copenhagen.*

Trade Missions Go

and Come



Members of the Canadian Pulp and Paper Mission to Latin America arriving at Santiago airport to begin their study of Chile's pulp and paper industry.

■ The trade mission has within the last eight years become an increasingly important method of promoting export trade. It is not a new technique—the Department dispatched its Minister to Australia on a mission way back in 1893—but not until the 1960's was its usefulness fully exploited. Four missions were organized by the Department of Trade and Commerce in 1960—two to Britain and Ireland, one to the EEC countries, and one to Latin America. Since then the program has expanded year by year; from 1960 to the end of 1967 the score was 91 trade missions sent abroad and 74 missions brought to Canada. In the main, incoming missions were composed of businessmen from the countries covered and outgoing of their Canadian counterparts, usually with some government officials included. These figures explain why, in 1962, a Trade Missions Division was set up within the Department to look after all aspects of organizing and administering the trade mission program.

This year the Department is organizing some 40 trade missions. About half of these will be outgoing: they will travel to the Middle East, to

Australia and New Zealand, to Britain, to the Soviet Union, to Latin America, to the Far East, to Italy and Spain, and to some African countries. The members will seek opportunities for selling products as diverse as jewellery and wire and cable, scientific equipment and furs, fertilizers and power transmission systems. The other half will be incoming missions from France, Portugal, India, Britain, the Netherlands, Spain, Latin America, the Middle East, the United States, and Romania. Their interests too will be as diverse as livestock, housebuilding, power-generating equipment, telecommunications, and seed potatoes.

The trade mission program has not only expanded—it has also changed in scope and direction as experience accumulated. Some of the early missions covered broad commodity areas; the EEC mission of 1960, for example, looked into the market for pulp and paper, metals and minerals, and chemicals. Today missions are more often confined to one product or group of products, such as furs, tobacco, hotel and institutional equipment, or pulp and paper products.

A second and more important change has been the emphasis on incoming missions. The 1967 program included ten outgoing missions covering some 20 countries and 32 incoming ones from six continents. Approximately 63 businessmen and officers of the Department served on outgoing missions and close to 400 on incoming ones.

It should be pointed out, however, that the emphasis on bringing people to Canada was a natural one in the year that saw Expo 67 and the Centennial celebrations. Generally speaking, incoming missions are planned to give the members a sound idea of Canadian capabilities in such fields as power generation, timber frame construction, cattle breeding, and aviation. Often the two types of missions are used to complement each other: an Electric Power Generation, Transmission and Distribution Mission to Mexico and Venezuela in April-May 1966 was followed by an Electrical Mission from Mexico in October-November of that year to "consolidate and further promote the benefits accruing from that mission."

A third change has affected the areas covered. The missions in the early 1960's were directed mainly towards Western Europe and the United States. In 1967, however, of the ten outgoing missions only two went to Western Europe and none to the United States. Three visited Eastern Europe, two Latin America, two the Far East, and one Australia. The principal reason for this change is that the Department feels that Canadian businessmen no longer need a great deal of help in dealing with Western European or American businessmen and

This Missio

that missions to state trading countries or farther afield can be more useful.

Trade missions have proved to be particularly valuable in promoting types of goods or services that do not lend themselves readily to displays in trade fairs—such as electrical generation equipment, industrialized building techniques, or purebred cattle—or which call for a consortium approach, such as consulting engineering or airport equipment.

The Trade Missions Division draws up for each fiscal year a trade mission program and this is then presented to a Trade Missions Committee set up within the Department to make its selection and recommend a program to the Minister of Trade and Commerce. In doing this, the committee relies upon close contact with and advice from the Trade Commissioners abroad, the provincial governments, trade and industry associations, and other groups concerned with the promotion of Canada's export trade. Gradually, the planning for trade missions is becoming more long-term. One good example is timber frame construction: missions in this field were first sent to Britain and British missions brought to Canada, with significant effects upon our sales of lumber. Now construction missions are going to the Netherlands and to France to increase the market in those countries.

Missions normally consist of from four to twelve representatives of business and industry, with a secretary who is a Trade and Commerce official. Usually it takes about six months to plan a mission properly and send it off but "instant missions" have been mounted in less than three weeks when the need was pressing.

How much solid export business do trade missions bring to Canada? It is difficult to pinpoint results in terms of sales, but a later check of a Building Supplies Mission sent to Western Europe in 1965 revealed that \$1.4 million worth of new business had developed and that prospects for more orders were promising. Similarly, a small mission on Iron and Steel Castings to the United States, also in 1965, reported \$142,000 worth of business with a much higher eventual total expected.

—O. MARY HILL
Editor, "Foreign Trade"



Every outgoing mission comes first to Ottawa for a briefing on conditions in the countries to which it is going, on their current problems, and on the industry under study in each area. Conducting these sessions for the Pulp and Paper Mission was the chief of the Latin American Division of the Department (seated at the head of the table). Third from left is M. K. Paumann, secretary of the mission.

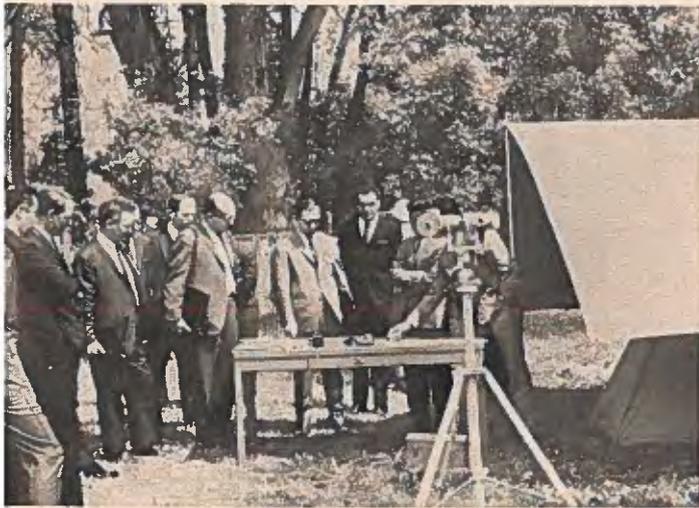
In Mexico, members of the Mission visited the Forest Inventory Center. Here technicians at the Center are explaining the operation of some of the instruments used in field work for measuring trees.



In Chile, the Mission toured three of the country's eight pulp and paper mills, some of which are using Canadian machinery. Later the members had an interview with the Minister of Agriculture (seated, fourth from left) who also is responsible for the development and conservation of Chilean forest resources.

Vent to Latin America

Typical of an outgoing mission was the Canadian Pulp and Paper Mission to Latin America in 1967. It was composed of seven men from the industry: V. Allard, Kruger Pulp and Paper, Montreal; F. W. Bradshaw, Consolidated Paper Corp., Montreal; G. C. Gibb, Canadian International Paper Company, Montreal; Dr. W. E. Haviland, Canadian Pulp and Paper Association; David F. Kerr, The Ontario Paper Company Limited, Thorold; T. G. Rust, British Columbia Forest Products Ltd., Vancouver; O. E. Zwanzig, The Price Company, Quebec, and M. K. Paumann of the Department of Trade and Commerce, who acted as secretary. The Mission left Canada on February 11 and returned on March 12, after visiting Mexico, Chile, Argentina, and Brazil, spending about one week in each country to study the pulp and paper industry there, to appraise sales prospects, and to investigate possibilities for investment.



In Brazil, some of the Mission members visited logging operations at Mogi-Guacu in the State of Sao Paulo. Watching the debarking of a eucalyptus tree is David F. Kerr (second from left), with Claude Charland, Canadian Commercial Secretary in Sao Paulo at that time (third from left) and M. K. Paumann.



In Argentina, members spent some time visiting the printing plant of La Razón, a large evening daily in Buenos Aires. Here the Canadians are looking at some of the rolls of newsprint used by the company. With them is Dr. A. Zubcov, the plant's technical manager.

These Missions Came to Canada

The 32 incoming missions that visited Canada in 1967 covered both a wide area geographically and a variety of commodity fields. Here are glimpses of a few of them, and of one in 1966.



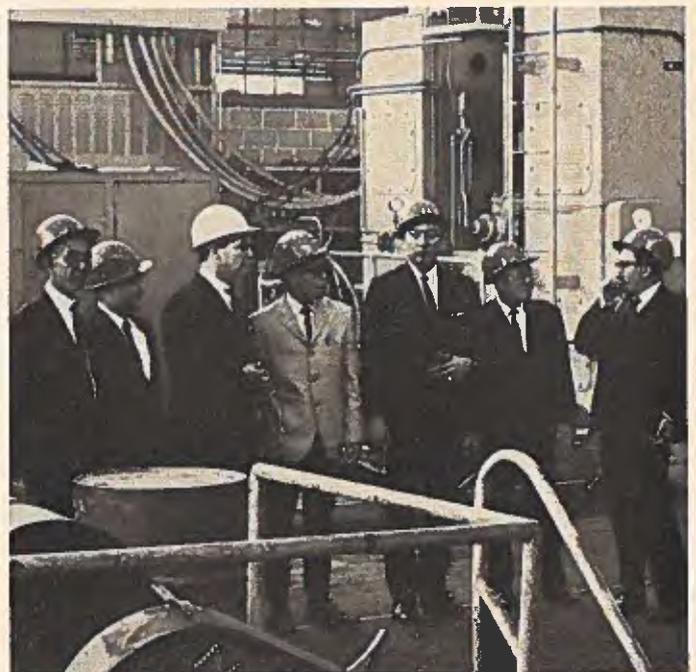
To make Japanese authorities aware of the excellent breeding stock for beef cattle that Canada can supply, a Beef Cattle Mission from Japan spent two weeks in Canada in October 1967, visiting the three Prairie Provinces and British Columbia. Here the mission members cast a sharp eye over some Herefords offered for sale at Kamloops, B.C.



Three engineers from South America (in white shirts, center of the picture), part of a Power Mission from South America and Iran which came to Canada last fall, photographed during a visit to the Whiteshell Nuclear Research Establishment in Manitoba. Dr. S. R. Hatcher (right) describes and demonstrates the studies made on the fluidization of spheres in liquids.



These white-coated gentlemen are all veterinarians from the EEC countries, who made up a ten-man Veterinary and Meat Inspection Mission which spent 16 days in Canada in September and October 1966, visiting meat-packing plants, etc. The purpose was to ensure that the EEC authorities administering regulations on meat and poultry imports would give full recognition to Canadian Health of Animals Certificates on export shipments.



Spring 1967 brought an 11-man mission on Forest Products Machinery to Canada for two weeks. The members were drawn from government and industry in four Southeast Asian countries—Thailand, the Philippines, Malaysia, and Taiwan. This picture shows them at a Cornwall, Ontario, mill.

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Territory: Bahamas, British Honduras, Cayman Islands, Turks and Caicos Islands

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J. A. Stiles, Minister (Commercial)

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Territory: Malawi, Tanzania, Uganda, Zambia

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Mozambique, Reunion, Swaziland

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Telex: 7060 (5-7060 CT)
Territory: Cape Province. Other countries: St. Helena, South West
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Rio de Oro, Spanish Sahara

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These slick-looking automatic glass washers undergoing final inspection before shipment to HemisFair '68 in San Antonio, Texas, are manufactured by The Paul Moore Company Limited, Winnipeg. Introduced recently to the United States market, the machine has gained wide acceptance by the beverage and restaurant industry. The company's recent participation in the International Hotel and Catering Exhibition in London resulted in some \$125,000 worth of sales this year.

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In Venezuela, It's Guayana for Growth

Private enterprise and government will work together in developing the immense potential of this region.

This article discusses major projects and alerts Canadian companies to possible opportunities.

J. E. KEPPEL, *Assistant Commercial Secretary, Caracas.*

THE Guayana region of Venezuela is a land of history, mystery and legend, a land where gold and diamonds were once sought. The wealth that the Spanish conquistadores looked for there in the 16th and 17th centuries is now being found, but in a strikingly different form.

The Guayana region is bounded on the north by the Orinoco River and separated from the more developed areas of north-central Venezuela by some 300 miles of sparsely populated plains where only 3 per cent of Venezuela's nine million people live. The flat savannah of Guayana is broken by mountain ranges, including the dramatic escarp-

ment of the Guayana highlands that extends to the Brazilian border and contains Angel Falls, the highest waterfall in the world.

Guayana is linked to the rest of eastern Venezuela and to the central region by excellent paved highways, complemented since January 1967 by the Angostura Bridge over the Orinoco at the state capital of Ciudad Bolívar. The air terminal of Ciudad Guayana is one of the busiest in the

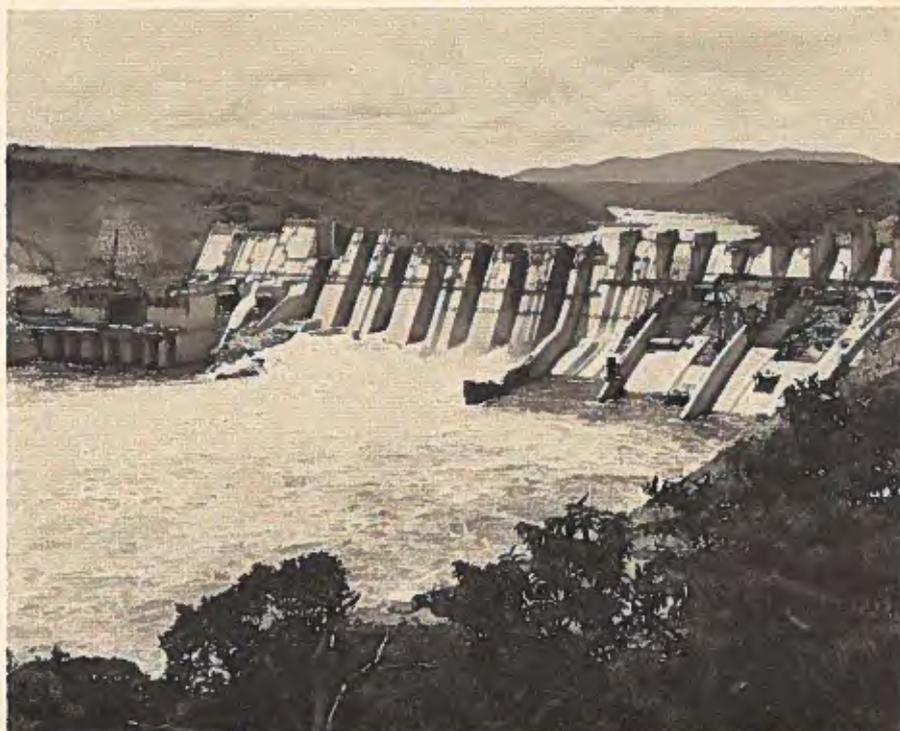
country. Even more important, there is direct access to the sea through the deep-water channel of the Orinoco River.

Rich Undeveloped Resources

The Guayana region has more rich, undeveloped natural resources than almost any other region in the world. Among the chief ones are:

Minerals—Iron ore of high quality (over 60 per cent Fe) is found in the extraordinary deposits of Cerro Bolívar, now being exploited by the Orinoco Mining Company, which expects to start construction of a pelletizing plant, and of El Pao, exploited by the Iron Mines Company (Bethlehem Steel). There are also sizable deposits in the San Isidro and El Trueno national reserves, with proven reserves of 1.3 million tons. Manga-

When this picture was taken last year, the Guri Dam was being built; now it is nearing completion. The first three of the planned ten generators will be installed this year. Eventually power will go from the dam site to Caracas, Valencia and other large Venezuelan cities.



nese, gold and diamonds are also found in the Guayana and because of the geological characteristics, bauxite may eventually be discovered there. Within a radius of 180 miles from Ciudad Guayana are the coal mines of Naricual, the salt mines of Araya, the limestone quarries of Anzoátegui, sulphur in the State of Sucre, magnesite on the Island of Margarita and kaolin in the State of Bolívar.

Forests—Forests in the Guayana region consist mostly of tropical heterogeneous woods of short fiber. Only a small part of these forests, probably less than 2 per cent, have been cut. The Caroní Forest Reserve, near Santo Tomé de Guayana, covers 1.25 million acres, and contains more than 60 million cubic meters of wood. These extensive reserves, similar to those being used in Colombia and Brazil for the production of pulp and paper, favor the construction of a pulp plant.

Hydroelectric power—The Caroní River in its lower reaches has a hydroelectric potential of 10 million kilowatts, one of the greatest in the world. Macagua, a plant situated on the Caroní, 1.8 kilometers from the Orinoco, with an effective capacity of 360,000 kilowatts, is today supplying the electric power needs of Guayana industry in its current phase of development. Construction of the Guri Dam is under way and when completed it will have a capacity of six million kilowatts.

Waterways—Ciudad Guayana is connected to the Atlantic Ocean by the Orinoco River, which consists of a channel made up of some natural stretches of deep water and other parts easily dredged, 225 miles from the western end of Ciudad Guayana to the mouth of the Orinoco. This permits year-round navigation for ships up to 30 draft feet; in the Puerto Ordaz-Boca Grande area, which is used by ships transporting iron ore, displacement may be up to 32 feet. This waterway makes possible the low-cost assembly of raw materials and therefore makes this a good location for industrial projects using low-cost Guayana energy, even when their raw materials originate outside the region.

Hydrocarbons—Within a radius of 185 miles from Ciudad Guayana are petroleum reserves amounting to 2,200 million barrels of oil and 300,000 million cubic meters of gas. At present, there is a pipeline which takes crude oil to Ciudad Guayana for loading tankers for export.

The Government has announced the construction of a gasline approximately 200 kilometers long from the Anaco zone in the State of Anzoátegui to Ciudad Guayana, which will permit the establishment of industrial projects, such as the direct reduction of iron ore and ammonia, which make use of low-cost natural gas.

Exploiting These Resources

The Venezuelan economy presents a paradox of rapid growth and relatively high unemployment. The agricultural sector, even with a notable expansion in production in recent years, will provide only limited employment opportunities. With almost one-third of the labor force, it produces only 7 per cent of the nation's output. The petroleum industry, though it provides more than two thirds of government revenue and 90 per cent of exports, employs only 2 per cent of the labor force and is expected to expand more slowly than the economy as a whole. In a word, Venezuela urgently needs industrial diversification and substantial new exports to offset the slower growth in petroleum earnings, to achieve a better balanced industrial structure, to provide productive jobs, and to create investment opportunities.

In answer to this need, Venezuela's National Plan outlines an ambitious industrial development program. Of special note is the high priority given to targets set for the Guayana region production of electric power, steel, aluminum, chemicals, machinery and pulp. To achieve these targets, an ambitious investment program has been undertaken. The bulk of investment needed is to come from the private sector, in response to market prospects and inducements. The public sector is scheduled to make up about two-fifths of the investment. The Guayana Program, including both the public and private sectors, would account for 10 per cent of total investment.

Of special note is the mandate to the CVG* to carry out important elements of the national investment program, such as one-third of the electric power and one-fifth of the manufacturing investment programs. The two programs combined make up more than half of the total target for Guayana region investment, public and private.

The general policy followed by CVG is that all Guayana projects—other than infrastructure projects that require subsidies, hydroelectric development, and the steel industry—should be in the hands of private enterprise, national or international. For key industries, mixed corporations have been and will be established. The recently opened aluminum smelter, Aluminio Del Caroní S.A. (ALCASA), is an example of this, with 50/50 participation of CVG and Reynolds International.

Some of the main emphasis in the Guayana program are discussed below.

Hydroelectric Development

The hydroelectric complex on the Guri River, which will be the main source of power for heavy industry in Venezuela, is progressing well towards completion. This year the first three generators with a total capacity of 550,000 kw. will be installed. This new capacity, plus the existing 360,000 kw. capacity of the Macagua plant, will provide the Guayana region with an installed capacity of 910,000 kw. The three generators which will be installed are the first of a total of ten and these will be brought to full capacity in three stages. The first stage calls for a combined capacity of 1.75 million kw.; this will be raised to 3 million in the second stage and to 6 million in the third and final stage.

As the work on the Guri Dam and plant proceeds, a complementary expansion program is being carried out to enable power to be transmitted from the Guri Dam to Caracas, Valencia and other cities in the center of Venezuela. The principal project is the completion of a 600-kilometer 400 kv. transmission line from Guri

*Corporación Venezolana de Guayana, created in December 1960 to develop the resources of the region.

to Caracas. The Caracas-Valencia area, which accounts for most of Venezuela's electricity consumption, is served primarily by the government system operated by C.A. de Administración y Fomento Eléctrico (CADAFE) and the private system of La Electricidad de Caracas. The private system of La Electricidad de Caracas, which operates on a frequency of 50 cycles in the city of Caracas, is being converted to 60 cycles to enable it to use electric power from Guri. This frequency conversion is scheduled to be finished by 1970 to coincide with the completion of the Guri-Caracas transmission line.

Aluminum Smelter

Aluminum reduction requires enormous amounts of electric energy and the Guayana region was thus an ideal location for ALCASA (Aluminio del Caroní S.A.), a mixed venture with 50/50 participation of the Venezuelan Development Corporation and Reynolds International.

The plant was opened last October with an initial capacity of 10,000 tons, to be expanded to 22,500 tons by 1970. Domestic consumption of aluminum in Venezuela has been estimated at 18,000 tons, all of which has been imported.

The smelter will be able to supply aluminum to existing Venezuelan industrial consumers such as extrusion plants, cable manufacturers, kitchen utensil and metalworking shops, construction companies, and food packing companies.

Steel Plant

The demand for steel products has been growing steadily in Venezuela. The first pouring of the Orinoco Steel Mill (Siderurgica del Orinoco C.A.), better known as SIDOR, took place in July 1962 and steel production reached 538,000 metric tons by 1965. This included 317,000 tons of pig iron, 36,000 tons of shapes, 55,000 tons of reinforcing bars, and 13,000 tons of foundry products.

Because of current demand when the steel mill was planned over ten years ago, more than half of its production capacity was to be geared to seamless pipe. No installations for production of flat rolled products

were planned at that time. The next addition is to be a rolling mill for flat products.

With this addition, it will be necessary to expand the ingot capacity. The production of the four Siemens-Martins furnaces will be augmented by the injection of oxygen which will increase capacity to 1.2 million tons.

One of the most notable technical innovations in the plant has been the installation of nine Tysland-Hole electric iron ore reduction furnaces. Other installations include a structural shapes rolling mill with a capacity of 225,000 tons, a blooming mill with a capacity of 1.25 million tons, a seamless pipe mill with a capacity of 300,000 tons of small, medium and large diameter pipe, an iron and steel foundry with a capacity of 50,000 tons, a large and fully equipped maintenance shop, a sintering plant, a pier on the Orinoco capable of accommodating two 10,000-ton vessels simultaneously, and an electrode manufacturing plant.



Pulp and Paper

The demand for paper and board has increased in Venezuela to over 230,000 metric tons in 1965. The considerable forest reserves of the Guayana region, although not homogeneous stands, offer possibilities for the economical operation of a pulp plant.

The Venezuelan Development Corporation and the main paper com-

panies have formed a corporation, C.A. Pulpa Guayana, to produce pulp from short-fiber woods. The project is currently under study because the area offers new problems in harvesting, conservation and reforestation. The first phase consists of the construction of a 250-ton-per-day bleached kraft pulp mill. Eventual plans call for the manufacture of paper in the Guayana region.

What It Means for Canadians

Its mineral and forest resources have given Canada the opportunity of developing an expertise which could well be applied to Venezuela.

As the Guayana region is rich in resources and relatively under-developed, good opportunities exist for Canadians in the areas of exploration, mining and forestry. Arrangements are under way for a survey of mineral resources by the Ministry of Mines and Hydrocarbons which will be financed with funds administered by the CVF (Corporacion Venezolana de Fomento: Venezuelan Development Corporation). Promotion of mining activity will be based on the results of the survey. Inquiries should be directed to the office of Dr. G. Bedregal, Departamento Promocion Industrial, Apartado 1129, Caracas, with a copy to the Commercial Counsellor, Canadian Embassy, Apartado del Este 11452, Caracas.

Although Venezuela is self-sufficient in many kinds of paper and paper products such as kraft, tissue and towelling, all newsprint and pulp requirements must be imported as well as about 50 per cent of the paperboard. The pulp and paper mill under consideration would be located in the central Guayana area near the major hardwood forests. The logging and sawmilling industry in this area is still in an early stage of development and there is an excellent potential for Canadian sawmill, logging and materials handling equipment. Of the 140 band sawmills in Venezuela, 28 produce about 50 per cent of all sawn lumber and the average production of these larger plants is only between 5,000 and 7,000 cubic meters per year per plant.

Canadian equipment exporters are advised to visit Venezuela themselves to survey and sell in a market that is just opening.

The Containerization Movement: Sydney

The Port of Sydney, Australia, is expected to have up-to-date container facilities by late 1968. Port authorities will spend Cdn. \$120 million to provide efficient handling of cargoes.

WILLIAM G. ROBERTS, *Assistant Commercial Secretary, Sydney.*

■ Sydney boasts a 21-square-mile harbor with approximately 152 miles of foreshore bordering its various arms and sheltered bays. It is a weekend yachtsman's paradise, as any visitor knows. But it's a working harbor too and in 1966-67 nearly 2,300 overseas vessels discharged approximately 4.5 million tons of cargo. Oil ranked first in the list of goods imported, with timber, motor vehicles and parts, paper and newsprint following close behind.

The Port of Sydney is owned and administered by the Maritime Services Board of New South Wales (MSB), a statutory body under the ministerial control of the State Premier.

The MSB announced a ten-year redevelopment program in 1966 for the ports under its jurisdiction—Sydney, Newcastle and Botany Bay. The program called for redevelopment and creation of new facilities in Sydney and Newcastle as well as a feasibility study of Botany Bay to determine its suitability for development as a general-purpose port. Approximately Cdn.\$175 million was budgeted for the program with nearly Cdn.\$120 million earmarked for Sydney alone. MSB policy calls for development work in the Port of Sydney to be carried out by the MSB's own day-labor staff and by contract arrangement where appropriate.

Container service was introduced between the ports of Melbourne and Fremantle in 1964. Original plans for a container service between Sydney and Fremantle were revised when the MSB was faced with the problem of providing facilities for overseas container vessels expected to arrive from Britain by 1969. Accordingly, tenders were invited late in 1966 for the construction of container facilities at White Bay on the Balmain foreshores of Sydney Harbor. Early in 1967 a Cdn.\$5.4 million contract involving the first stage of construction of a terminal complex with a wharf face of 2,200 feet embracing an area of about 20 acres of flat land was let to CITRA (Aust.) Pty. Ltd. Work commenced shortly after. Tenders will be

The author of this article, W. G. Roberts (third from left) and John Castle, traffic manager for the Canadian National Railways in Sydney, (second from left) watch the offloading of a container from the Matson Lines' "Ventura" in Sydney.



What the Port of Sydney Moved in 1966-67

Number of vessels—coastal 1,647, (5,499,605 gross tons); overseas 2,291 (20,206,491 gross tons).

Import tonnage—coastal 3,386,825; overseas 4,456,702.

Principal overseas commodities imported—(tons) bulk oil 1,652,106, timber 400,065, motor vehicles and parts 262,887, paper and newsprint 230,895, chemicals 188,470, non-electric machinery 178,455.

Export tonnage—coastal 413,366; overseas 4,733,625.

Principal commodities—(tons) coal 2,077,636; (bales) wool 1,099,720; (tons) wheat 1,025,129; (tons) flour 105,302.

let later on for buildings and equipment, bringing total cost to about Cdn.\$17.5 million.

The eastern end of the complex, a 1,330-foot wharf face embracing 12 acres of flat land, should be completed late in 1968. The western end of the complex, an 850-foot wharf embracing eight acres of flat land, is scheduled for completion by mid-1969.

Companies Preparing

The eastern end of the complex will be operated by Seatainer Terminals Ltd. Seatainer is jointly owned by Overseas Containers (Aust.) Pty. Ltd. (OCAL), an associate of Overseas Containers Ltd. (OCL), one of the two British consortia planning container services between England and Australia, and Associate Steamships Pty. Ltd., a company which has been operating the container service between Melbourne and Perth since 1964. Seatainer by using cranes intends to stack containers four and five high at the terminal. Special vehicles will transfer the containers to and from the terminal stacks and wharf gantry cranes. Both British companies, OCL and Associated Container Transportation (ACT), however, plan to use offsite depots or consolidation areas.

Six container ships have been ordered by the British consortium OCL for delivery between January and June 1969. Each ship will carry 1,138 containers built to International Standards Organization recommendations of 8 x 8 x 20 feet. The 745-foot long ships (27,000 gross tons) will sail from Tilbury, Britain, calling at Fremantle in 21 days, Sydney in 26

days, and Melbourne in 30 days for a scheduled round voyage of 63 days. OCL member companies are: Alfred Holt and Co., British and Commonwealth Shipping Co. Ltd., Furness, Withy and Co. Ltd., and Peninsular and Oriental Steam Navigation Co.

The second British consortium, ACT, is composed of five British ship-owners: Ben Lines Ltd., Blue Star Line Ltd., Cunard Steamship Co. Ltd., Ellerman Lines Ltd., and Thos. & Jas. Harrison Ltd. ACT has ordered three cellular container ships from German shipyards for delivery in February, April and June 1969. The 715-foot long, 24,000-gross-ton vessels will each carry 1,130 standard 8 x 8 x 20-foot containers, of which 800 will be for general cargo and 330 for refrigerated cargo. ACT interests in Australia will be handled by its subsidiary, Trans-Ocean Containers Pty. Ltd. (TOC).

OCL and ACT plan to integrate their services to share the same terminal facilities. They intend to offer a weekly service between Sydney, Melbourne, Fremantle and Tilbury. To achieve this, the nine ships of the two British consortia will be operated on a tight 63-day round voyage schedule.

Facilities for Scandian ships are also available in the Port of Sydney. The first of these ships arrived in Sydney in late 1966 and embodied the modern principle of self-containment in automated loading in contrast to the old principle of loading by gear on the wharf. The ships have been designed to cater to the movement of paper, pulp and other goods from Scandinavia to Australia and the shipment of Australian wool, skins,

general cargo and refrigerated cargo to the Continent. They have been specifically designed to handle unitized cargo and all cargo is either pre-slung in units, palletized, or stowed in open 15-foot flats (an open-type container). In addition, each vessel carries up to 50 standard containers on deck.

Feeder Services

Provision of feeder services is important in Australia because the bulk of the population and industry is located on the coast. Brisbane and Adelaide will be served by OCL through feeder ships operated by Associated Steamships Pty. Ltd. from Sydney and Melbourne respectively. TOC plans to use rail for its feeder services although ocean services may also be used where appropriate.

Other shipping groups are also investigating the use of container services for the Australia/United States and Australia/Japan routes.

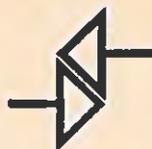
Significant economies are expected from the introduction of container services. Even if the pier-to-pier rate on a given commodity remains constant in comparison with conventional shipping, there appear to be potential savings in terminal transport, packing, documentation, bank interest, and damage claims.



Training Export Staff

■ The American Society of International Executives was founded in 1964 under the aegis of the Foreign Traders Association of Philadelphia, Inc. Its purpose is to promote the knowledge of exporting skills and to create educational standards for the profession. It does not organize classes itself but provides course outlines so that students can cover the ground in whatever way and at whatever speed suits them. Examinations are held in some twenty centers throughout the United States in May and October each year. Fees are moderate. Corporate as well as individual membership is offered. For more information, write to the American Society of International Executives, Secretarial Suite, Sheraton Hotel, Philadelphia, Pennsylvania 19103.

trade lines



Thailand plans a steel mill

A recent survey by German experts showed iron ore reserves of over 7 million tons in the Khao Tap Kwai area of Lopburi province. A 400-ton-a-day steel mill will be built in the next five years to utilize it. The Siam Iron and Steel Company has been organized to raise U.S.\$32.5 million—80 per cent from Thai investors, the rest from abroad—Singapore.

Lebanon wants more powerful transmitters

When funds are available from savings in general administration, the Lebanese Government will set up a 1,200 kw. transmitter to broadcast to the Arab world and parts of Europe as well as to the whole of Lebanon. At present, there are 100 kw. transmitters broadcasting on medium wave in Arabic, on short wave in various languages to emigrants, and putting out Western programs on medium wave. There is also a 3 kw. FM transmitter. These don't even cover all of Lebanon—Beirut.

Nuclear power for Taiwan?

If the Legislative Yuan approves, the Republic of China (Taiwan) may start building its first nuclear power plant at Linkou towards the end of the year. It will have a capacity of at least 300,000 kw. and will take between four and five years to build. Negotiations for a U.S. \$70 million Export-Import Bank loan are in progress—Manila.

Brazil may produce domestic aircraft

It has been confirmed that Germany's Dornier organization will build a factory in the state of Minas Gerais. One hundred and twenty-five manufacturers have already been inspected, screened, and catalogued by the Brazilian Air Ministry as able to produce components for Brazil's first nationally made aircraft—São Paulo.

Italian trade up in 1967

Provisional trade figures for 1967 show Italian imports increased about 10 per cent and exports by 8 per cent. A deficit of about 500 billion lire (\$800 million) on the trade balance will be largely covered by a surplus in the balance of payments. Offsetting emigrant remit-

tances, Italian shipping revenue, and receipts from tourism will provide a further surplus of \$640 million—Rome.

Work has begun on Dubai harbor

The new deepwater harbor which will enable Dubai to expand its entrepot trade will cost Cdn.\$21 million and take four years to complete. It will include two breakwaters, new quays, dredging, and land reclamation. At a recent ceremony, the Ruler drove in the first pile of the sheet pile cofferdam. Costain Civil Engineering Ltd. of London, England, is the contractor—Beirut.

Britain turns out aerosol products

The production of aerosol products in Britain increased by 10 per cent in 1967 over 1966 (176.9 million units compared with 160.8 million). Hair sprays and dressings totalled some 65 million, insecticides 21 million, air fresheners 17.5 million, and waxes and polishes 14.5 million—Liverpool.

Hong Kong tastes in chicken change

Communist China supplied 75 per cent of Hong Kong's chicken in 1966. Last year deliveries fell by Cdn.\$2.5 million and represented only 60 per cent of the market's requirements. The meat of the Chinese chicken is yellowish and Hong Kong consumers used to prefer it, but the whitish meat of chickens from the United States, Australia and Japan is now gaining in popularity. This should mean bigger imports—Hong Kong.

Phosphates from Syria soon

Syria will start to produce phosphate from the Kneifess district in November 1968. Production will reach 25,000 tons next year, rising eventually to 300,000 tons. In southwest Palmyra production will begin in 1970 and will rise to 300,000 tons in time—Beirut.

Iraq's sulphur interests international firms

Several international companies are competing for the opportunity to exploit Iraq's rich sulphur deposits in the Mishracq area south of Mosul. These have a reported capacity of one million tons annually. World sulphur production now totals about 16.5 million tons a year (U.S. 8 million, Canada 1.8, Mexico 1.7,

France 1.6). The contest appears to be mainly between two U.S. companies—Texas Gulf Sulphur and Panamericana de Mexico, which is 34 per cent owned by Pan American Sulphur Co.—and the French Société Nationale des Pétroles d'Aquitaine—Beirut.

Hong Kong's airport requires consultants

Present forecast for the next ten years for Hong Kong's airport, known as "Kai Tak", indicates increases of 12, 17 and 30 per cent a year in the number of aircraft, passengers and volume of freight. Improvements to airport facilities and extension of the runway to meet this growth are being planned for early 1969. Consultants will be required for an air cargo complex. Canadian firms interested in bidding for the design contracts should write to the Canadian Trade Commissioner, P.O. Box 126, Hong Kong, who will put them in touch with the proper authorities—Hong Kong.

Satellite improves Italy-Canada connections

The addition of two new trunk lines by means of satellite "Intelsat 2" brings to six the number of telephone circuits connecting Canada and Italy. This makes possible six two-way conversations at one time—Rome.

Australia seeks markets for LPG

Further large discoveries of oil and natural gas in the Bass Strait are forcing B.H.P. Co. Ltd. to look to East Asia for markets for LPG. Australia's annual requirements are under 200,000 tons, but the company's share in the Bass Strait field is expected to produce some 500,000 tons a year—Melbourne.

Pakistan looks for uranium

The Government of Pakistan will shortly undertake exploitation of recently discovered uranium deposits. The Karachi nuclear power station (which Canadian General Electric Company is helping to build) will require an estimated 14 to 15 tons of fuel a year. If the uranium deposits prove suitable, the plant will use local uranium instead of imported fuel—Rawalpindi.

Libya to double oil production this year

Libya expects to produce 150 million tons of oil a year by the end of 1968, with the exploitation of new oilfields. In 1967, it produced 83.5 million tons of oil and 10.4 billion cubic meters of natural gas, putting it seventh among the main oil-producing countries—Rome.

Lebanon plans automatic telephone system

Plans for connecting all parts of Lebanon by an automatic telephone system were studied recently by

the Parliamentary General Planning Committee. During the debate it was pointed out that the law of September 18, 1967, provides for installing 50,000 new telephone lines. Of these, 21,000 lines will be connected to existing centers and 29,000 lines to new centers to be established in Beirut and Tripoli. This is in addition to the 24,000 lines to be distributed to the public in 1968 and 1969—Beirut.

Brazil starts up new fertilizer plant

Rolandia Industria, Comercio e Agricultura SA began production of granular compound fertilizers in March. This year it will make 26,000 tons, next year 50,000 and by 1970, some 75,000. Raw materials are ammonium sulphate, urea, single superphosphate, and muriate of potash. The market in North Parana (the State bordering on São Paulo) has a potential of 500,000 to 700,000 tons a year. RICASA sells its product in 50 or 60 kilo multi-ply paper bags. The firm is linked to organizations dealing in various farm supplies—São Paulo.



Foreign Tariffs and Trade Regulations

Trinidad and Tobago

EXCHANGE CONTROL REGULATIONS—The Central Bank of Trinidad and Tobago has announced that if residents of Trinidad and Tobago who hold credit cards issued by companies outside the sterling area wish to use these cards to pay for expenses incurred while travelling outside that area, release of exchange appropriate for the journey must first be obtained through local banks or the Exchange Control Division of the Central Bank. Upon approval of the release, the local bank will make exchange available to reimburse the credit card company up to the approved amount and upon presentation of the relevant invoice.

Residents of Trinidad and Tobago who obtain credit cards on the strength of a declaration that they hold foreign bank accounts may be required by the Exchange Control to settle their indebtedness to the debit of such accounts.

Companies operating in Trinidad and Tobago which hold U.S. bank accounts either with the approval of the Exchange Control or by virtue of their association with a U.S. head office must not record debits in these accounts in favor of their foreign head offices in compensation for payments by the latter of the credit card indebtedness of local employees.

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.

Spain—L. A. Campeau, Commercial Counsellor in Madrid:

Toronto—September 16-24	Edmonton—October 3
Hamilton—September 25	Winnipeg—October 4
Vancouver—September 27-October 2	Montreal—October 6-11

United States, Chicago—D. H. Cheney, Consul and Senior Trade Commissioner in Chicago:

Toronto—August 19-21	Montreal—August 22-23
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United States, Washington—S. G. Tregaskes, Commercial Counsellor in Washington:

Montreal—September 16-20	Toronto—September 21-27
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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).

L. A. Campeau, Commercial Counsellor in Madrid, Spain, September 4-15.

D. H. Cheney, Consul and Senior Trade Commissioner in Chicago, August 12-16.

J. H. Suggitt, Consul and Assistant Trade Commissioner in Los Angeles, August 1-12.

S. G. Tregaskes, Commercial Counsellor in Washington, September 9-15.

In Territory

Barbados—J. A. Ahow, Commercial Officer in Port-of-Spain, Trinidad, will visit Bridgetown August 20-22.

Bulgaria, Czechoslovakia, Hungary, Rumania—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.

Guyana—D. J. McJanet, Assistant Commercial Secretary in Port-of-Spain, Trinidad, will visit Georgetown August 26-30.

Sarawak—Philip Stuchen, Commercial Counsellor, Kuala Lumpur, Malaysia, will visit Sarawak, Brunei and Sabah from July 29 to August 10.

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).

Tobago—D. Hobson-Garcia, Commercial Officer in Port-of-Spain, Trinidad, will visit Tobago September 3.

Trinidad—J. M. C. Lavoie, Assistant Commercial Secretary in Port-of-Spain, Trinidad, will visit South Trinidad August 13-15.

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



J. Denis Belisle will be posted to Washington as Assistant Commercial Secretary late this year. Mr. Belisle, who is completing the training course with the Trade Commissioner Service in Ottawa, was born in Drummondville, Quebec, and graduated from the University of Sherbrooke, B.Comm. 1963, M.Comm. (Adm.) 1964. He did post-graduate study at the Institute of International Studies, Geneva, 1965-66.

The Ocean Freight Market

■ Dry-cargo charter rates in the tramp shipping freight market tended to ease during the second quarter, although the downward trend was not nearly as pronounced as in the first quarter of the year. Average charter rates in most major Canadian trades were slightly lower than those recorded in the previous quarter. Average rates in many of these trades were also lower than those in the same quarter a year ago.

On the St. Lawrence, rates paid by Indian Government charterers for the transport of heavy grain cargoes dropped from 137s.6d. to 132s.6d. per ton towards the end of the second quarter. In the Pacific sector of the market, rates for grain shipments to Communist China declined from 74s. to 65s.6d. per ton during the quarter. Japanese charterers continued to employ large

bulk carriers for the carriage of coal from Hampton Roads, but showed preference for smaller-type vessels to move wheat cargoes from the Pacific coast.

On the basis of the fixtures reported for Northern Range discharge, chartering activity in the Caribbean sector of the tanker market was relatively heavy throughout the second quarter. Activity in the Persian Gulf area of the market was conducted on a more moderate basis. The tanker rate for black oil from the Caribbean to United States North Atlantic ports was Intascale minus 20 per cent at the beginning of the quarter, climbed to a peak level of Intascale plus 75 per cent at mid-quarter, then eased to the Intascale flat rate of \$2.26 per ton at the end of the quarter.

CHARTER RATES—SECOND QUARTER 1968

The rates shown in column A are in sterling or U.S. dollars with the Canadian dollar equivalent in column B calculated at £ = \$2.58 or U.S. \$ = \$1.08. For comparison, the rates a year ago are shown in column C with the Canadian dollar equivalent in column D calculated at £ = \$3.03 and U.S. \$ = \$1.08. The rate schedule does not necessarily represent all charter movements to or from Canadian ports since details of certain fixtures are not published.

TIME CHARTERS

The classes of ships indicated have been selected as representative for the purpose of illustrating time charter rates. Average rates per deadweight ton per month for the second quarter of the year were as follows:

	Second Quarter 1968		Second Quarter 1967	
	A £ or U.S.\$	B Cdn.\$	C £ or U.S.\$	D Cdn.\$
General Trading (approximately 6 months)				
Motorships 11,000-12,999 dwt. 13-14.9 knots	3.85	4.16	3.54	3.82
Motorships 13,000-14,999 dwt. 13-14.9 knots	4.08	4.41	3.43	3.70
Steamships 9,000-10,999 dwt. 9-10.9 knots	2.40*	2.59	15s.6d.	2.35

TRIP CHARTERS

Average rates for the second quarter of the year were as follows:

	Second Quarter 1968		Second Quarter 1967	
	A £ or U.S.\$	B Cdn.\$	C £ or U.S.\$	D Cdn.\$
Heavy Grain (per long ton)				
St. Lawrence to Albania	68s.0d.*	8.84	65s.6d.	9.92
St. Lawrence to Britain	44s.2d.	5.74	41s.2d.	6.24
St. Lawrence to Belgium/Holland	3.17	3.42	3.52	3.80
St. Lawrence to Norway	31.50 (Nw Kr)	4.80	.....	.....
St. Lawrence to West Germany	3.30*	3.56	.....	.....
St. Lawrence to Venezuela	6.50*	7.02	.....	.....
St. Lawrence to Morocco	6.21	6.71	.....	.....
St. Lawrence to Italy	6.83	7.38	6.30	6.80
St. Lawrence to India	133s.7d.	17.37	.....	.....

	Second Quarter 1968		Second Quarter 1967	
	A	B	C	D
	£ or U.S.\$	Cdn.\$	£ or U.S.\$	Cdn.\$
St. Lawrence to Spain	3.75*	4.05		
Churchill to Britain	50s.0d.*	6.50	45s.0d.*	6.82
Churchill to Belgium/Holland	4.50	4.86		
Great Lakes to Algeria	9.43	10.18		
Completing St. Lawrence	5.43	5.86		
Great Lakes to Britain	63s.1d.	8.20	71s.5d.	10.81
Completing St. Lawrence	31s.6d.	4.09	37s.11d.	5.74
Great Lakes to Belgium/Holland	6.38	6.89	8.30	8.96
Completing St. Lawrence	2.90	3.13	3.86	4.17
Great Lakes to West Germany	6.13	6.62		
Completing St. Lawrence	2.75	2.97		
Great Lakes to Venezuela	10.00*	10.80		
Great Lakes to France	9.13	9.86	12.10	13.07
Completing St. Lawrence	3.15	3.34		
Great Lakes to Taiwan	14.50*	15.66		
Completing St. Lawrence	11.50*	12.42		
Great Lakes to Lebanon	10.50*	11.34		
Completing St. Lawrence	5.50*	5.94		
Great Lakes to Spain	8.28	8.94		
Completing St. Lawrence	3.75	4.05		
Great Lakes to Norway	6.90*	7.45	63s.0d.*	9.54
Completing St. Lawrence	4.00*	4.32	32s.6d.*	4.92
Great Lakes to Tunisia	10.75*	11.61		
British Columbia/North Pacific to Japan	8.13	8.78	7.66	8.27
British Columbia/North Pacific to Philippines	9.31	10.05	7.46	8.06
British Columbia/North Pacific to S. Korea	8.17	8.82		
British Columbia/North Pacific to Venezuela	7.34	7.93	7.81	8.43
British Columbia to Communist China	68s.6d.	8.90	35s.6d.	5.37
British Columbia to Taiwan	9.33	10.08		
Coal (per long ton)				
Hampton Roads to Japan	6.97	7.53	7.00	7.56
Oilseeds (per long ton)				
British Columbia to Japan	7.52	8.12	7.67	8.28
Scrap Iron and Steel (per long ton)				
U.S. North Atlantic to Japan	10.50	11.34	12.19	13.17
St. Lawrence to Communist China	160s.0d.	20.64		
U.S. North Atlantic to Italy	4.52	4.88		
California to Japan	4.45*	4.81	8.15	8.80
St. Lawrence to Italy	9.75*	10.53		
Sulphur (per long ton)				
British Columbia to New Zealand	67s.0d.*	8.71	52s.6d.*	7.95
British Columbia to Australia	65s.0d.*	8.45	61s.6d.	9.32
British Columbia to Belgium/Holland	5.50*	5.94		
Ammonium Sulphate (per long ton)				
British Columbia to India	12.75*	13.77		
Potash				
British Columbia to Belgium/Holland	5.50*	5.94		
British Columbia to Italy	5.50*	5.94		
British Columbia to Georgia (U.S.)	4.00*	4.32		
Oil Black (per long ton)				
Venezuela to Portland, Maine	2.48	2.68	1.62	1.75
Persian Gulf to Portland, Maine	9.91	10.70	6.17	6.66
Venezuela to East Coast Canada	3.84	4.15	1.92	2.07

*One fixture reported only.

Foreign Exchange Rates

These nominal quotations may help exporters in checking prices, but they should consult their bank before making any firm commitments. When more than one rate is shown, the one to be used depends on the commodity traded. Information on the rate for any specific commodity may be obtained from the Office of 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 buying rate is that at which banks purchase exchange from exporters; the selling rate is that at which bank sell exchange to importers.

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

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

Country and Currency	Value of		Country and Currency	Value of	
	Foreign currency unit in Canadian dollars	Canadian dollar in foreign currency units at July 16		Foreign currency unit in Canadian dollars	Canadian dollar in foreign currency units at July 16
Algeria Dinar	.2161	4.63	Denmark Krone	.1431	6.98
Argentina Peso (free)	.0031	322.58	Dominican Republic Peso	1.074	.93
Australia Dollar	1.199	.8340	Ecuador Sucre (official) (free)	.0597 .0535	16.50 18.45
Austria Schilling	.0416	23.98	El Salvador Colon	.4298	2.35
Bahamas Dollar	1.053	.9506	Fiji Pound	2.467	.41
Belgium and Luxembourg Franc	.0215	46.25	Finland Markka	.2558	3.91
Bermuda Pound	2.565	.39	France, Monaco, etc. ³ Franc	.2161	4.63
Bolivia Peso	.0903	10.97	Franco-African Republics ⁴ Franc	.0043	2.35
Brazil Cruzeiro (official free)	.3352	2.99	French Pacific ⁵ Franc	.0119	84.24
Britain Pound	2.569	.39	Germany D Mark	.2680	3.73
British Honduras Dollar	.6423	1.56	Ghana New Cedi	1.053	.95
Burma Kyat	.2256	4.43	Greece Drachma	.0358	27.93
Ceylon Rupee	.1805	5.54	Guatemala Quetzal	1.074	.93
Chile Escudo (bank rate) (free)	.1563 .1358	6.34 7.36	Guyana Dollar	.5381	1.85
China, Republic of New Taiwan Dollar (official)	.027	37.04	Haiti Gourde	.2149	4.65
Columbia Peso (fixed)	.066	14.95	Honduras Lempira	.5372	1.86
Congo, Republic of France	2.149	.4653	Hong Kong Dollar	.1773	5.64
Costa Rica Colon	.1622	6.12	Hungary Forint (official)	.0921	10.86
Cuba ² Peso	.....	.....	Iceland Krona (official)	.0189	52.91
Czechoslovakia Koruna	.1492	6.70	India Rupee	.1424	7.02

Country and Currency	Value of		Country and Currency	Value of	
	Foreign currency unit in Canadian dollars	Canadian dollar in foreign currency units		Foreign currency unit in Canadian dollars	Canadian dollar in foreign currency units
	at July 16			at July 16	
Indonesia ⁶ Rupiah	.....	.....	Paraguay Guarani (free)	.0086	116.28
Ghana Rial	.0142	70.42	Peru Sol (free)	.0243	41.66
Iraq Dinar	3.008	.33	Philippines Peso (free)	.2753	3.63
Ireland Pound	2.569	.39	Poland Zloty (fixed basic rate)	.2685	3.72
Israel Pound	.3070	3.23	Portugal & Colonies ⁷ Escudo	.0373	26.80
Italy Lira	.0017	581.86	Saudi Arabia Riyal	.2066	4.84
Jamaica Pound	2.569	.39	Sierra Leone Leone	1.504	.66
Japan Yen	.0030	333.33	Singapore Dollar	.3510	2.85
Kenya Shilling	.1526	6.55	South Africa Rand	1.504	.66
Lebanon Pound (free)	.3331	3.00	Spain & Dependencies Peseta	.0155	64.25
Malaysia Dollar	.3510	2.85	Sweden Krona	.2079	4.81
Mexico Peso	.0860	11.64	Switzerland Franc	.2499	4.00
Morocco Dirham	.2123	4.72	Syria Pound (free)	.2812	3.55
Netherlands Florin	.2966	3.37	Thailand Baht (free)	.0521	19.19
Netherlands Antilles Florin	.5697	1.76	Trinidad & Tobago ⁸ Dollar	.5392	1.85
New Zealand Dollar	1.203	.83	Tunisia Dinar	2.047	.48
Nicaragua Cordoba	.1535	6.51	Turkey Lira	.1194	8.38
Nigeria Pound	2.995	.33	United Arab Republic Pound (official)	2.471	.40
Norway Krone	.1504	6.64	United States Dollar	1.074	.93
Pakistan Rupee	.2256	4.43	Uruguay Peso (free)	.0043	232.55
Panama Balboa	1.074	.93	Venezuela Bolivar (official free)	.2393	4.18
			Yugoslavia Dinar (official)	.0860	11.64

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, 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.



Suddenly It Was Sahara

■ Monsieur Lefebvre's office is furnished simply and in good taste. There are reference works in a bookshelf and a chart spread out on the table. From time to time, Monsieur Lefebvre speaks into the intercom to give an instruction or to ask for a file. The room has the atmosphere of calm that one finds on the bridge of an ocean liner.

Sitting there talking to him, I tried to picture the scene one morning early last year. A call from St. Louis, Missouri, was announced on the intercom. I could see Monsieur Lefebvre turning round in his chair, listening attentively. An independent team of engineers was needed immediately to check plans for a natural gas pipeline in Algeria and advise on specifications for the pipe and pumping stations. The job, which would normally take four or five months, had to be completed in two. He looked at his diary and the disposition of his staff. Yes, it could be done. Gendron et Lefebvre had not worked abroad before, but it had the expertise and welcomed the challenge.

To the layman, the engineer's and the oilman's worlds are peopled by complicated organizations with strange-sounding names. Sonatrach is the Algerian national oil company and it takes in all stages of the business, from prospecting to marketing petroleum and natural gas. In June 1967, Algeria signed an agreement to supply France with a total of 480 billion thermies* of gas over a 15-year period, beginning 1970-71. To do this, Sonatrach had to build a second pipeline from the Hassi R'Mel gasfield to the coast. Somalgaz, a joint enterprise of Sonatrach and the French Erap, would be responsible for liquefying plants and vessels to ship the gas across the sea.

Scandia Consult, an international firm of consultants, was commissioned to study the project and relate it to new industries which might be set up along the pipeline. The Bechtel Corporation and Sofrégaz, a technical subsidiary of Gaz de France, examined the alternative routes. The choice was narrowed down to two, and each route had its advocates. Time passed and no clear-cut decision emerged. At this point, the Canadians were called in to evaluate the data and choose an engineering solution

which would give the best profitability and throughput. They were also asked to specify pipe diameters, working pressures and filtering equipment.

Claude Lefebvre set off straight away for Algiers. There was not time to get visas before leaving and this caused some minor problems. However, he was soon able to start work and he began by dividing up the task so that six engineers could be employed on it simultaneously. Being separated from computers, reference books and colleagues posed a problem which was solved by periodic trips back to Canada. Typing and office services for this specialized kind of work were lacking too. On the other hand, two of the team had experience of working in North Africa.

Within the allotted time, the specifications for the pipeline were ready. It will be a 40-inch pipe running from Hassi R'Mel to Skikda (formerly known as Philippeville), a distance of about 380 miles. Along the route there will be branch lines to take the gas to a number of towns in Eastern Algeria, giving the industries of the whole region a big boost. Sonatrach has entrusted the construction of the pipeline to Sofrégaz. Laying the pipe was scheduled to begin in June 1968.

Algeria is reported to have signed three contracts for the purchase of steel pipe. Italy will supply 35,000 tons and take iron ore in exchange; Japan will supply 42,000 tons and take iron ore and pig iron in exchange, and the Comptoir Franco-Belge d'Exportation de Tubes d'Acier will supply 114,000 tons in return for iron ore and wine.

It was a lucky chance which brought Gendron et Lefebvre its first overseas contract. The firm is interested in doing more work in North Africa—or anywhere else, for that matter. "We can't expect a telephone call from a colleague every time," Monsieur Lefebvre told me. "We are actively looking for business now that our appetite has been whetted. The Chevrier Mission to Francophone Africa promised Canadian aid and this should bring more opportunities. But our experience has shown that even when a market seems to be closed, there may still be an opportunity for a Canadian firm prepared to go at short notice."

—M. A. JOHNSTON,
Assistant Editor, "Foreign Trade".

* 1 thermie = 3,968 B.T.U.

Good Letters, Busy Agents

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