

# foreign trade



Department of Industry, Trade and Commerce, Ottawa

**August 30/69**



**Je vais à Montréal**

## **In This Issue**

One morning in late spring, we called on Arnold Steinberg, vice-president and treasurer of Steinberg's, at the firm's headquarters on Cremazie Blvd. in Montreal. We were in quest of a story about Steinberg's in France and feeling a bit sceptical about the possibility of winning the French housewife over to one-stop shopping. We emerged from the interview one hour later convinced that the three "Supermarchés Montréal" now in business in Paris have had no trouble finding customers.

About this time, one of our colleagues went to Paris to be on duty at the Canadian Pavilion at the Paris Air Show. We asked him to tour one of the Supermarchés and take some pictures for us. He and an interested Paris taxi-driver spent part of a morning in the Vaucresson store and took the pictures that illustrate the article on page two, "Je vais à Montréal."

(The taxi-driver, incidentally, is photographed looking over the wine display with a shrewd French eye—see page three.) Our cover picture, taken at the same time, shows discriminating French shoppers making their selections at the meat counter.

In our July 5 number, we reviewed business and trade in five Middle Eastern countries. This time we turn our attention to Kuwait and the Gulf States, with their oil revenues that are financing rapid development. Several Canadian consulting firms are at work in the area, largely designing and supervising infrastructure projects. To discover other opportunities, see pages 5 to 10. There's a special report on the market for oilfield equipment throughout the Middle East that does not deal in generalities but gives specific information for the exporter.

Chris Poole was posted to Brussels about a year ago as Assistant Commercial Secretary after completing a year's training in Ottawa. He has lost no time in getting acquainted with Belgium and the Belgians, as his article on a business visit to BLEU proves. He has managed to convey facts and also the particular flavor of the country and its people.

Coming next? As summer turns toward fall, we will be running in our September 13 number a practical article on the market for Christmas trees in the United States, particularly in the New York area. It's none too early to brief the potential Canadian suppliers. And for the many companies that export to the Caribbean, the Kingston office has supplied a useful piece on the Caribbean Free Trade Association, its development, and its present and potential influence on the pattern of trade.

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# Je vais à Montréal

Fifteen months ago, Steinberg's of Montreal opened a Canadian-type supermarket near Paris; now there are three. Here's the story of this joint Canadian-French venture.

O. MARY HILL  
Editor, "Foreign Trade"

When the mère (or père) of a French household in Chambourcy or Vaucresson, both suburbs of Paris, says one morning, "Je vais à Montréal", she doesn't mean that she is taking off for Montreal forthwith. She's merely announcing that she intends to go shopping at "Supermarchés Montréal". In Quebec she would say, "Je vais chez Steinberg". C'est la même chose—almost.

If a Canadian accompanied Madame on her shopping expedition, he would feel quite at home driving into the 900-car parking lot and making for the store. But chances are that he would emerge from it saying, "Why don't we have supermarkets like this in Canada?" He probably has been browsing around the wine, spirits and liqueurs department (with its 650 beverages and sodas and its vin ordinaire for 25 cents a bottle), gaping at the array of cheeses, or furthering his gourmet education by examining the matched display of wines and cheeses. (One North American visitor was stunned when he ordered a half-pound of Camembert and the clerk asked, "Do you want to eat it today or tomorrow?" and supplied cheese of precisely the right degree of ripeness.) He may have lingered at the fish counter, with its 35 kinds of fresh fish and shellfish, or stood with greedy eyes in the delicatessen section. It supplies far more than the standard North American cold cuts, cole slaw, and potato salad—almond sauce, several different kinds of pâté, canapes, escargots and many other French and German delicacies. At Chambourcy, there are pastries made under the direction of a one-time chef of the French Line's *France*. The snack bar in the store would look familiar enough, but what supermarket bar in Canada serves wine and beer?

**The first of the Supermarchés Montréal—there are now three of them—opened about 15 months ago at Chambourcy,**

between St. Germain-en-Laye and Poissy, about half-an-hour from the heart of Paris. The three are enterprises of La Société Supermarchés Montréal, in which the Steinbergs of Montreal hold 48.4 per cent of the shares. The opening was a festive one. Pony rides, balloons and clowns were provided to amuse the children, there were contests to attract shoppers, Air Canada and the Province of Quebec set up displays, and on the last evening of opening week fireworks lighted up the French sky. In November 1968 a second store opened in Vaucresson, a Paris suburb not far from Versailles. The third and latest, opened in June 1969, is in Paris itself in the Place de la République. To conform with Parisian building regulations, it looks outside as if it were built in Napoleon's day but inside it's as modern as a computer.

**If "Steinberg's in France" were a film scenario, the first scene might logically take place at the Harvard Business School in Cambridge, rather than in Paris or Montreal.** There Arnold Steinberg, now vice-president and treasurer of Steinberg's Limited, met François Béraut of Paris, a graduate of two years' standing. He had departed for Brazil soon after he graduated and gone into retailing, setting up supermarkets in Rio and Sao Paulo. It was the second meeting of these two men, in Montreal in 1961, that proved important. Béraut came to Montreal to study the latest supermarket merchandising techniques and looked up Arnold Steinberg. Steinberg's at the time was hunting for a place to expand outside Canada; Béraut, like all good Frenchman, was hankering after Paris and anxious to return there. Why not set up a merchandising operation in France and satisfy both ambitions? Each party had money to invest and experience with supermarkets to contribute. France was several laps behind other West European countries in the move to mass merchandising. The few com-

panies already running supermarkets there were doing well, but there was plenty of room for newcomers. Language would be no problem; Steinberg's is a bilingual organization.

The seven years between this meeting and the opening of the Chambourcy store saw a number of problems discussed and solved and construction begun and completed. Question one was, would it be better to put up a few large supermarkets or a number of small ones? Where should they be placed? Arnold Steinberg made a number of visits to France and studied the situation. In addition, he engaged one of the leading market research firms in France to suggest locations, estimate the probable volume of business, and study other questions. Eventually the firm came up with a 150-page report, a bill for \$7,000, and 30 suggested locations for a supermarket. These were all within 30 kilometers of Paris, since Mr. Steinberg had already decided that it would be better to concentrate on three large stores in the outskirts of the French capital. In the suburbs, it was possible to buy enough land to include a large parking lot in the plans, and the rapidly rising car ownership in France proved that shopping by car was becoming practical.

Eventually Steinberg and Béraut picked the Chambourcy location for their first venture. At the beginning of 1964 Béraut left Brazil, established himself in Paris, and prepared to get the new organization incorporated and to obtain a building permit. His first few months were spent entangled in red tape and battling the bureaucracy; it took a year to win incorporation and two years to get the building permit. The fact that foreign capital was going into the venture complicated the incorporation; French policy demanded that the foreign interest not exceed 50 per cent. Eventually La Société Supermarchés Montréal was born, with a capital of \$600,000 and

1. The cheese connoisseur has plenty of choice in the Vaucresson store. Awaiting him are Brie, Cantal, Crostin de Clavignole, Brès bleu, and others. There is even some cooked cheese.

2. Fish anyone? Thirty-five different varieties are sold here. That includes everything from the lowly salt cod to fresh sardines and sea eels.

3. It's easy to select your favorite wine; there's a section for white, a section for red, one for champagnes. Spirits too are separated by types and go direct from shelf to shopping cart.

4. The different provinces of France produce different types of ham; a discriminating consumer chooses his from a special mid-store display.

5. The jolly mascot, Max the Beaver, appears on all advertising and promotion material that Supermarchés Montréal puts out. It is all part of the store's Canadian image.



with Steinberg's holding 48.4 per cent of the shares. François Béraut was named president and general manager and Arnold Steinberg a director. The name chosen had real significance for both. Béraut was born in Montreal, France, (near Gers) and his associate in Montreal, Quebec. **The Canadian touch was evident in the choice of a mascot, Max the Beaver, who appears on all signs and in all advertisements.**

The request for a building permit had to be approved by 26 different government departments, from the municipal level up. In fact, the Société hired people just to follow the various dossiers from office to office and check on the progress of all that paper!

At last the building of a 44,000-square-foot store at Chambourcy began, including 24,000 square feet of sales space and 20,000 of storage space, because of the lack of warehouses in France. This makes it actually larger than any Steinberg supermarket in Canada. Adjoining the store is a 900-car parking lot that also has a car wash, equipped with Swiss machinery.

**It was time for the enterprise to turn its attention to staffing and training problems.** Chosen in France, many of the personnel then travelled to Montreal to learn supermarket techniques. At this point, Steinberg's was able to take advantage of the agreement on technical training between the Government of France and the Province of Quebec, under which the Quebec Government assumed part of the cost of training staff in Montreal for the Paris operation. The trainees were carefully chosen to meet the criteria set out in the agreement and accountants, merchandise buyers, store managers, and other categories were included. The majority of these trainees spent from six months to a year in Canada; one man stayed for three years and actually worked as a store manager. When he returned to Paris, he became a merchandise coordinator for Supermarchés Montréal. As experience in France accumulated, Arnold Steinberg observed that many of the persons whom they hired— butchers, pastry cooks, delicatessen managers—knew their trade thoroughly but lacked experience in directing those who served under them. This probably reflects the individualism

both of French society as a whole and of French retailing in particular.

The Steinbergs never did expect that their venture in France would increase the flow of Canadian food products to that country dramatically. Their three French stores do stock maple syrup and sugar, peanut butter (a more exotic item in Europe than it is in Canada), Canadian beer, and some Canadian frozen foods. The Canadian touch is also evident in the introduction of better quality ice cream. Most of the store equipment, with the exception of a few of the counters, was bought in Europe. Typically North American features are the larger store size, store layout, merchandise fixtures, snack bars, and car-order service. In other words, in the food section it is the techniques rather than the products that are new to retailing in France.

Move away from the food to the non-food sections of the store and the situation changes. In the Chambourcy and Vaucresson stores, about 7,000 of the 24,000 square feet of merchandising space is devoted to non-food items. In stock are women's dresses (including maternity wear, a relative novelty in France), children's wear, men's bathing trunks, housewares, and what the French call "bricolage" (do-it-yourself supplies and equipment). In this section a good deal of the merchandise comes from Canada; Arnold Steinberg estimates that it is bought from 30 to 40 Canadian manufacturers. Even paying the duty, the Supermarchés can price these goods competitively. For those who are looking for something more unusual there are handwoven ties and belts, wood carvings, table settings, and other products of Canada.

**On one thing both the market researchers and the hopeful partners proved to be too conservative—their estimates of the volume of business.** Actually it has almost outstripped their capacity to handle it. Each store in France now does, on the average, five times the volume of business done by the normal Steinberg store in Canada. To see the 22 checkout counters at Vaucresson with cash registers clicking is to believe it. To keep the eager customers coming and to introduce innovations, essential in business today, Supermarchés Montréal intends to open

two or three new supermarkets in the Paris area in 1970 and the same number in 1971. Planning for these is already under way. At Chambourcy a shopping center is being added that will have an auto supply store catering to the do-it-yourself-market that is big in France. Banking service, a travel agency, and boutiques are also in the plans. Each store already has a garden center and carries fresh flowers the year round. About every two or three months, Arnold Steinberg spends a week in France, visiting the stores, conferring with Béraut, and shaping ideas for the future.

Problems? There are some, such as staff training and the lack of warehouse space, but these are not intractable. Competition? It comes mainly from the open air markets that are still a way of life in France. Some of the habits engendered by centuries of shopping at the market remain; shopping is still a gregarious pastime, with three generations in a family often visiting the supermarket together, and with some haggling over purchases. These are superficial matters and Mr. Steinberg believes and has proved that, given the resources and facilities that his stores provide, the demand and response are much the same as in Canada.

What's ahead? To his mind, the supermarket is gradually becoming a way of life in large French cities as it is in Canada. Other merchandisers will undoubtedly move in and competition will increase. But Béraut and his partner are not too worried. Choosing Max as the stores' mascot was prophetic: Supermarchés Montréal seem destined to keep on being as busy as the proverbial beaver.

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## International Loan Announced

**Pakistani farmers will be able to buy more tractors, thanks to an IDA loan.** The International Development Association is providing a credit of U.S.\$30 million which will be reloaned by the Pakistan Agricultural Development Bank over a two-year period to finance the purchase of 5,200 tractors, 3,000 power-tillers and a variety of tractor implements and pay for the installation of 8,000 tubewells.

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# Kuwait

Kuwaitis have money to spend on consumer products and the active construction industry needs materials, hardware and equipment. It's a bustling, competitive marketplace.

D. I. DITTO

Assistant Commercial Secretary, Beirut

Kuwait has money—lots of it. Its per capita income was U.S.\$4,734 in 1968, one of the highest in the world, and total 1967 imports amounted to \$636 million. Twenty years ago its modest economy was based on pearling, fishing and trading; now nearly all its fabulous wealth comes from oil. During 1968/69, in fact, about 92 per cent of the Government's total income of \$776 million and half of its U.S.\$1.7 billion 1966/67 gross national product came from the petroleum industry.

Since the start of the oil boom in the 1950's, Kuwait's oil production has increased steadily. In 1968 it became the third largest Middle East producer (after Saudi Arabia and Iran) with a production of 2.63 million barrels a day—a 5.4 per cent increase over 1967. It has one-fifth of the world's proven oil reserves and additional ones are believed to exist offshore and in the border area between Kuwait and Iraq.

Although oil dominates Kuwait's economy, several new industries have appeared. Government-financed and controlled heavy industry includes the Kuwait National Petroleum Company's refinery which has a capacity of 95,000 barrels a day and the Kuwait Chemical Fertilizer Company, which produces approximately 500 tons a day each of liquid ammonia, sulphuric acid, urea and ammonium sulphate. Combined public and private investment is currently being studied for 14 light industry projects, including a cement clinker grinding plant, electric cable production, and an air-conditioner assembly operation. In addition, there are three local commercial shrimp-fishing companies selling mainly to export markets.

In 1968 over \$100 million worth of major contracts were awarded to foreign firms. Many of these projects are part of the Government's U.S.\$881 mil-

lion Five Year (1967-72) Development Plan, and include contracts for an increase of 30 million gallons per day in the present 18 million gallons per day desalination plant and additions to the 410 kw. capacity electric power generation system, publicly owned. Future projects include low-cost housing, schools, a university and other public buildings, and extensions to water, transportation and communication systems. The Government's \$132 million a year direct aid to Jordan and the United Arab Republic has necessitated a temporary delay on some projects.

Government purchases of private land, good wages from oil companies and from the Government (40 per cent of the population is on the government payroll), and a generous welfare program (including subsidized housing, free education and health services) leave most Kuwaitis with money to spend on consumer goods. There is a good demand for competitively priced foodstuffs, clothing, automobiles, air-conditioners, electrical appliances and kitchenware. There are also opportunities for engineering and management consulting services and because of the active construction industry, a market for a wide range of building materials, hand tools, hardware and construction machinery.

Competition is keen, with the United States, Japan, Britain, West Germany and Italy accounting for about 60 per cent of imports. Canada's small share of this market (\$2.5 million in 1968), however, seems the result of a lack of knowledge of the market opportunities rather than of obstacles to trading. There is direct shipping service for Canadian exporters once a month from both East and West Coasts and competitively priced North American and European-styled items are readily accepted in Kuwait. Although Cana-

dian products are not yet well known, Kuwaitis do express interest in finding Canadian commodities of good quality to meet the requirements of this increasingly sophisticated market.

To sell in Kuwait, Canadian manufacturers should first contact the Canadian Embassy in Beirut for a preliminary market assessment and for the names of potential agents in Kuwait, because they are needed for all commercial imports. Next, price quotations c.i.f. Kuwait should be forwarded to local merchants for price comparisons and trial orders. It is important that documents show Canada as the country of origin. When the response to initial market tests is favorable, the Canadian exporter should visit Kuwait. Kuwait City is a modern, pleasant and bustling place. It boasts a population of 450,000, an international airport, two new luxury hotels, and modern shopping facilities. Don't pay a visit between mid-May and mid-September because of the heat and humidity and because most local businessmen go on holiday at this time. Travelling during the month-long Ramadan fast (November 10 to December 10 in 1969) should also be avoided. As in most Middle East countries, the visitor must be inoculated against cholera and smallpox. Friday is the usual day of rest and there are frequent civic and religious holidays (see list). Canadian businessmen travelling with a Canadian passport can obtain visas for Kuwait and other Middle East countries in Beirut, but allow two days for this and bring extra passport photographs with you.

When planning the trip, Canadian businessmen should write beforehand to the following address: Commercial Counsellor, Canadian Embassy, Rue Clemenceau, Alpha Building, Post Office Box 2300, Beirut, Lebanon.

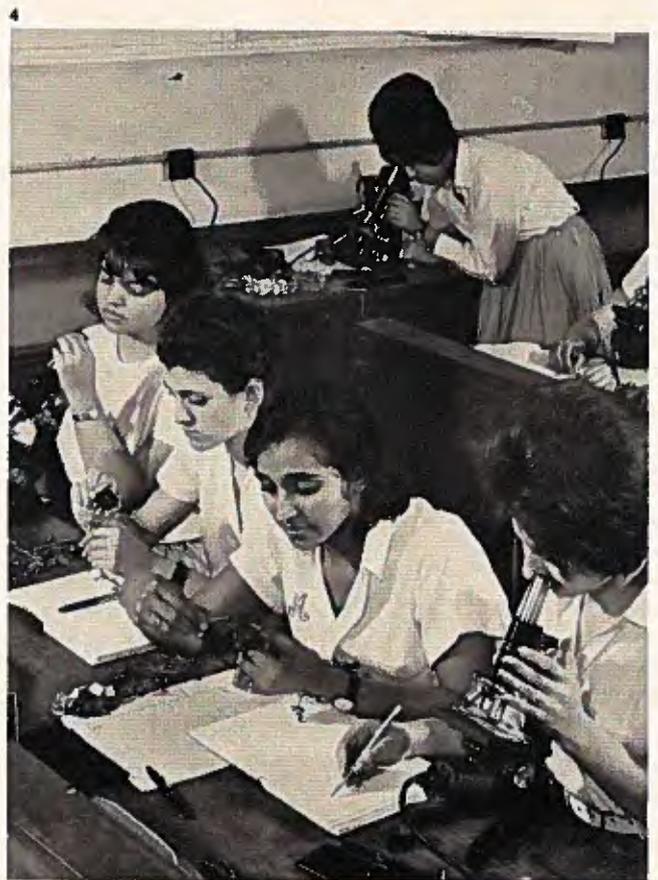
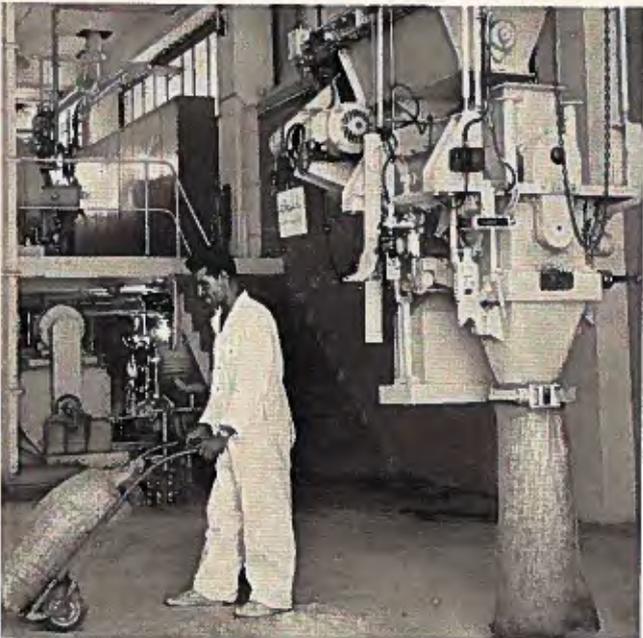
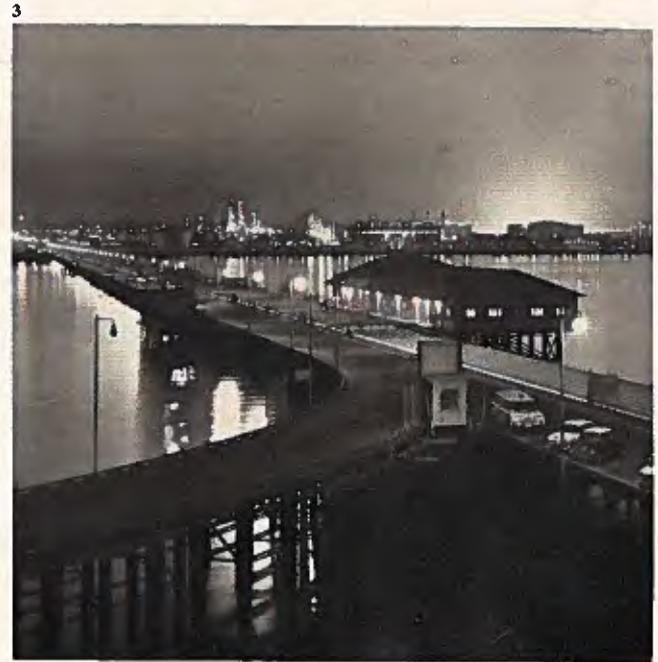
1. Kuwait is anxious not to rely solely on the petroleum industry and is particularly active in establishing light industries, like this one turning out asbestos cement pipe.

2. This chemical fertilizer factory in Kuwait produces about 500 tons a day each of four chemical products—liquid ammonia, sulphuric acid, urea, and ammonium sulphate.



3. This does not look very much like the usual image of Kuwait as a small country surrounded by the desert. It shows the part of Ahmadi at night, with the city beyond.

4. Part of the oil revenue Kuwait receives is spent on the education of its children and all education is free. These secondary school girls are doing laboratory work.



# Kuwait in Brief

## Area

9,050 square miles including the 25,000 square mile Neutral Zone jointly administered with Saudi Arabia; 99 per cent desert.

## Population

600,000; some 50 per cent are foreigners (mostly nationals from other Arab countries, India, Pakistan and Iran).

## Currency

Kuwait dinar; one dinar equals Cdn. \$3.006 (July 1969).

## Banking

Central Bank; four private commercial banks.

## Finance

Gold and foreign exchange holdings (1968) Cdn. \$1.2 billion (equivalent). Oil revenues (1968/69) Cdn. \$717 million.

## Economy

GNP (1966/67) Cdn. \$1.8 billion; per capita income (1968) Cdn. \$4,734; GNP rate of annual increase (1960/69) 8 to 10 per cent.

## Political status

Independent constitutional Amirate (monarchy) since 1961; Prime Minister ap-

pointed by Amir; National Assembly elected by adult male Kuwaitis.

## Total Kuwait imports

1967—Cdn. \$636 million; 1966—Cdn. \$496 million.

## Chief imports

(Cdn. \$ million) 1967—food and live animals 87; iron and steel 43.4; fabrics, all kinds 42.9; clothing and footwear 35.4; non-metallic mineral manufactures 29.8; chemicals, pharmaceuticals and paints 24.9; beverages and tobacco 20.6; crude materials 17.4.

## Chief suppliers

(Per cent) 1967—United States 27.6, Japan 16.1, Britain 15.9, West Germany 12.3, Italy 6.1.

## Total Kuwait exports

1967—Cdn. \$39 million; 98 per cent of total exports consisted of petroleum and figures exclude these; 1966—Cdn. \$41 million, excluding oil.

## Chief markets

(Per cent) 1967—main oil markets: Italy 21.4, Japan 17.7, Britain 16.5, France 7.2.

## Trade policy

Four per cent ad valorem duty on most imports. Commercial imports made only by Kuwaiti firms and nationals. Trade prohibited with Israel, Portugal, Union of South Africa.

## Public Holidays for 1969

January 1  
New Year's Day

February 25  
National Day of Kuwait

February 13-16\*  
Id al-Adha

March 19\*  
Moslem New Year's Day

May 28\*  
Birthday of the Prophet

October 8\*  
Ascension of the Prophet

December 11-14\*  
Id-al-Fitr (Ramadan)

\* Dates of Islamic holidays vary slightly with the sighting of the moon.

# Gulf States

Sleepy fishing villages in the Gulf States have suddenly become booming oil towns. Canadian exporters have a share of the market but it could be larger.

## D. I. DITTO

Assistant Commercial Secretary, Beirut

Rising oil revenues and Britain's decision to withdraw its forces by the end of 1971 have had a profound effect on Bahrain, Qatar and the seven Trucial States. The Rulers plan to set up a confederation when the British go and the less affluent states hope that they will get a larger share of their neighbors' wealth. Meanwhile, Western technology is rapidly transforming the desert and feudal villages are growing into modern towns.

The steep rise in average income and the numerous development projects planned or actually under way in many of the states mean a sizable

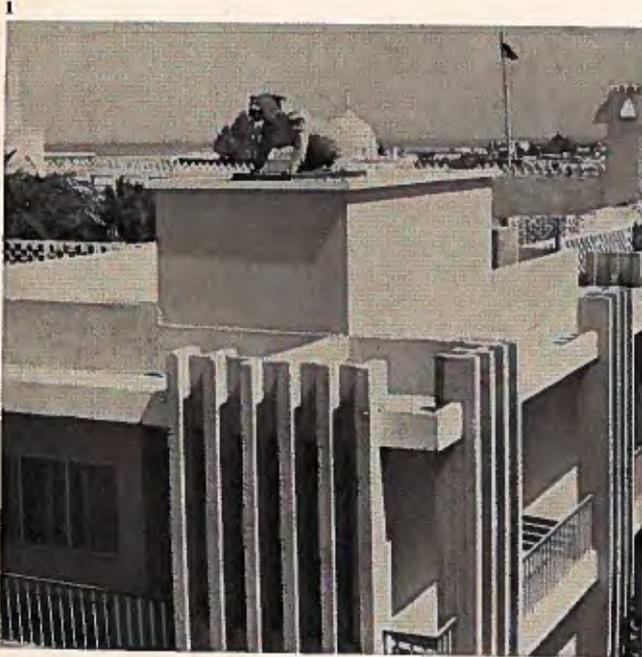
potential market for many Canadian products. The Gulf States need a wide range of building materials, builders' hardware and tools; furniture and office equipment; electrical equipment and supplies; automobiles and spares; earthmoving and materials handling equipment; oilfield equipment; housewares; readymade clothing, and foodstuffs. With more money from oil and with immigration adding to the population of over 400,000 in the nine states, the market should expand rapidly. Canadian exports to these states only amounted to Cdn. \$800,000 in 1968. We should be able to do better if we step up our sales effort.

For the present, Bahrain, Qatar, Abu Dhabi and Dubai should generally be treated as separate markets and agents appointed for each. Canadian manufacturers who are interested in them should begin by asking the Canadian Embassy in Beirut to make a preliminary market assessment for their products and to suggest possible agents. If they intend to visit Qatar and the Trucial States, they must give at least two weeks' advance notice to obtain visas and "no-objection" certificates.

Bahrain consists of 33 islands with a total area of 245 square miles and a population of 200,000. It is the most developed of the Gulf States.

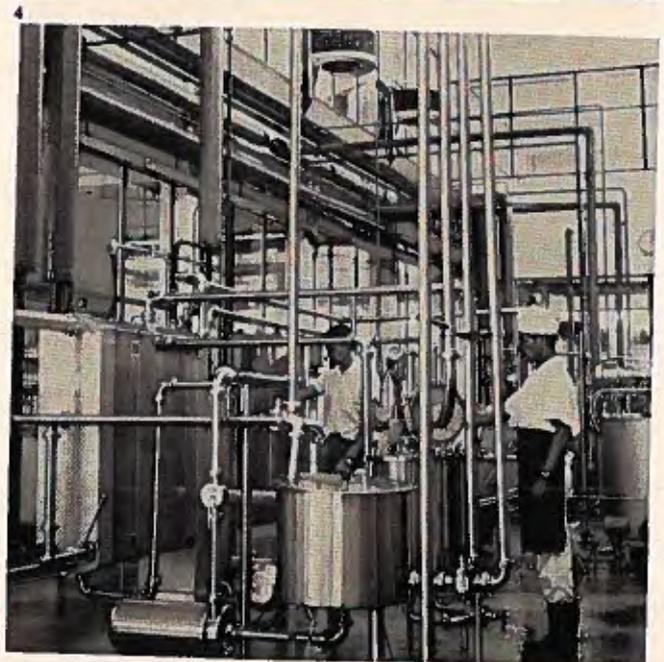
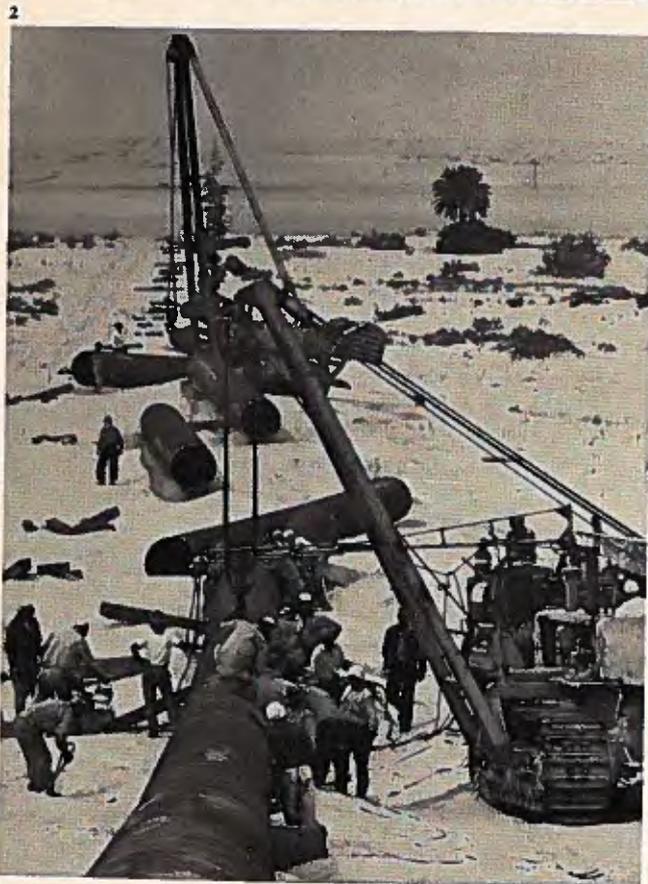
1. This imposing looking building is the Ruler's Palace in Abu Dhabi. One of the Trucial States and the largest and richest of them, it covers about 25,000 square miles.

2. Pipelines play a vital part in the distribution of oil in the whole Middle East area. Here a pipeline is being laid across the desert by a work crew aided by machines.



3. Abu Dhabi will soon have its new airport in operation; here it is shown under construction. It has been designed by a Canadian consortium; Canadians also designed the bridge being built from the mainland to Abu Dhabi island.

4. This whole area of the Middle East welcomes foreign know-how in the establishment of industries that will serve local needs. Here, for example, is a Danish dairy plant that has been set up recently in the Kuwait area.



Oil was discovered there in 1932 and production reached a record 3.4 million tons in 1967. The Bahrain Petroleum Company, the country's only oil company, refines approximately 3 million tons a year of its own crude and 7 million tons of Saudi Arabian crude which comes by under-sea pipeline.

In 1967 government revenue totalled Cdn. \$25.8 million, of which Cdn. \$16.3 million was derived from oil. This large revenue has made it possible to carry out ambitious programs. For example, the first stage of a new Cdn. \$18 million housing project has been completed and provides accommodation for 15,000 people. The total project will house 35,000. The Government has a 27 per cent interest in a Cdn. \$52 million aluminum smelter which will use Australian alumina and Bahrain's natural gas to produce 90,000 tons of aluminum a year. It will also provide much-needed jobs for skilled Bahrainis.

Bahrain has one of the most advanced social service systems in the Middle East and was the first Gulf State to offer free education and medical services. Now a quarter of the population is attending school and there are facilities for specialized technical education.

The three main islands are linked by bridges and the port can berth up to six ocean-going vessels. There is a busy international airport and several modern hotels for visitors.

**Qatar is a 4,000-square-mile peninsula jutting out from the Arabian peninsula and has a population of 80,000.** Oil production began in 1949; the two oil companies produced a record 15 million tons in 1968. Qatar's revenue, which is almost wholly derived from oil, is expected to reach Cdn. \$82.5 million in 1969. A new offshore concession given to a Japanese firm earlier this year will help to push revenues even higher in 1969.

The Government is pursuing a policy of industrial and commercial diversification. There is a shrimp fishing company and a 100,000-ton cement factory. A contract has been signed for construction of a Cdn. \$46 million fertilizer plant to produce 330,000 tons of urea and 100,000 tons of

ammonia a year for which the Government will provide about Cdn. \$13 million of ancillary facilities, including a loading terminal and a gas pipeline. Natural gas is used to distill seawater in a plant which supplies half the country's water and its electric power. Qatar is now self-sufficient in vegetables although 18 years ago the country grew no vegetables in commercial quantities. Part of a Cdn. \$25 million deepwater seaport has already been built and local contractors are completing a 65-mile highway to connect Qatar with Saudi Arabia. Work is also in progress on a Cdn. \$6.2 million sewerage scheme and a Cdn. \$3.4 million extension to the electric power system and a rural electrification program have been started. Qatar already has a network of over 500 miles of roads and free medical services and education.

**The seven Trucial States are Abu Dhabi, Dubal, Sharjah, Fujairah, Ras al Khalmah, Umm al Qaiwan and Ajman.** They extend for about 400 miles along the coast between Qatar and the Sultanate of Muscat and Oman, covering some 32,300 square miles. Their total population is about 120,000. All of them have piped water in the main towns and all except Fujairah have electricity. Abu Dhabi and Dubai are the two sheikdoms of most interest to Canadian exporters.

Before arranging a visit to any of the Gulf States, Canadian businessmen should contact the Canadian Embassy in Beirut. There are good hotels in the four major centers but accommodation is often completely taken so reservations should be made well in advance. Visas for visits to these states can be obtained in Beirut.

Abu Dhabi, the largest and richest of the sheikdoms, covers about 25,000 square miles and has a population of 40,000. Before commercial oil production began in 1962, Abu Dhabi town was a quiet coastal village of approximately 5,000. Revenue from oil in 1968 is estimated at Cdn. \$70 million and is expected to rise to Cdn. \$100 million by 1970. Abu Dhabi town as a result has been transformed into something like a massive construction camp with a population of about 16,000. The per capita income is unofficially estimated to be the highest in the world.

Contracts have been let on several major development projects in Abu Dhabi, including a desalination plant, a power station, a sewerage system, government buildings, a deepwater port, low-cost housing, a corniche, roads (including 100 miles of paved dual highway), a modern Canadian-designed bridge from the mainland to the island on which Abu Dhabi town stands, and a Canadian-designed international airport.

The Five Year Development Plan 1968-72 allocates Cdn. \$28 million to education, \$15 million to public health, \$31 million to agriculture, \$136 million to industry, \$13 million to communications, \$115 million to the municipalities, \$36 million to housing, \$13 million to tourism, \$22 million to public buildings, \$42 million to labor and \$112 million for loans and investment.

Dubai's prosperity depended traditionally on gold exports and the entrepot trade and both still flourish. However, the discovery of oil in commercial quantities off the coast promises an even brighter future for its 60,000 inhabitants. Dubai merchants do much of the importing for the smaller Trucial States and a fully-equipped 15-berth deepwater harbor is being built for them. A Cdn. \$10 million extension to the international airport there will provide facilities for jumbo jets.

**Commercial oil production is expected to start in Dubai later this year but already changes are being felt.** A 500,000-barrel underwater oil-storage tank is under construction and six huge offshore drilling platforms are being built locally. A new sewerage system, water pipelines and more roads are being built. A Cdn. \$4.3 million cement plant is planned which would meet some of the demands of the busy construction industry.

The sheikdoms of Sharjah, Ras al Khaimah, Fujairah, Umm al Qaiwan and Ajman depend mainly on Dubai for their imported goods. Sharjah is a British military base, has a civil airport and a port and does a small amount of entrepot trade. Ras al Khaimah's population is about 10,000; agriculture and oil exploration provide most of its income.

## The Gulf Market at a Glance

**Bahrain**—Total imports in 1967 were Cdn. \$78 million. Major imports in 1967 and value in millions of Canadian dollars were: foodstuffs 18, household appliances 18, piecegoods 13, machinery, oil equipment and hardware 13, clothing 7, building materials 5, automobiles and parts 5 and tobacco and cigarettes 2. The major suppliers were Britain 23 per cent, the United States 13, Japan 13, India 6, Pakistan 4, and West Germany 3. Canada's main exports in 1968 and value in thousands of Canadian dollars were: punched card sorters, computers and parts 105, passenger automobiles and chassis 27, clocks and parts 30, air-conditioning and refrigerating equipment 7, precooked frozen dinners 3, and tires 1. Our total

exports were Cdn.\$331,000 in 1966, \$82,000 in 1967, and \$221,000 in 1968.

**Qatar**—Total imports in 1966 reached Cdn.\$37 million. Major imports and value in millions of Canadian dollars were: textiles 3, vehicles 2, electrical machinery and equipment 3, transport equipment 1, tea, sugar and coffee 1. The major suppliers were Britain 15 per cent, the United States 11, West Germany 5, Japan 4. Canada's main exports in 1968 and value in thousands of Canadian dollars were: passenger automobiles and chassis 82, air-conditioning and refrigerating equipment 11, clocks and parts 6, nuts, bolts, screws and washers 5, and domestic washing machines 8. Our exports

totalled Cdn. \$409,000 in 1966, \$201,000 in 1967, and \$132,000 in 1968.

**Trucial States**—Total imports into Abu Dhabi and Dubai amounted to Cdn. \$247 million in 1968. Major imports were gold, watches, foodstuffs, machinery and oil equipment, and clothing. Major suppliers were Japan, Britain, Switzerland and the United States. Canada's main exports in 1968 and value in thousands of dollars were: aircraft and parts 165, passenger automobiles and parts 73, construction machinery and parts 63, asbestos 30, clocks and parts 10, and wet and dry cell batteries 22. Our exports totalled Cdn. \$152,000 in 1966, Cdn. \$162,000 in 1967, and Cdn. \$445,000 in 1968.

# Oilfield Equipment

In the next ten years, some \$215 billion will be invested in the oil industry around the world and a large part of it will go to the Middle East. Some of the best opportunities there for Canadian suppliers are with the "independents" and state-owned companies.

D. I. DITTO

Assistant Commercial Secretary, Beirut

Over 60 per cent of the world's estimated total oil reserves are in the Middle East, excluding North Africa. These reserves are six times the 1967 reserves of the United States and over thirty times those of Canada. Saudi Arabia's estimated reserves alone were 83.7 billion barrels in 1967 and were the largest of any country in the world; they constituted over 17 per cent of the known world total and new discoveries have recently added to them. The increase in reserves between 1946 and 1967 throughout the Middle East has been dramatic. According to the *Oil and Gas Journal*, between 1946 and 1967 reserves in Saudi Arabia shot up from 3 billion to 83.7 billion barrels, in Kuwait from 4 billion to 76.7 billion, in Iran from 6 billion to 43.8 billion, and in Iraq from 4.8 billion to 23.5 billion barrels. Reserves in Abu Dhabi are 15 billion barrels, in Muscat and Oman 2.5 billion, and in Qatar 3.7 billion.

Middle East crude oil production is also huge. In 1968 it was over 11 million barrels a day, about 36 per cent of free world output. Saudi

Arabia led Middle East producers with 3 million barrels a day, followed by Iran with 2.8 million and Kuwait with 2.6 million. Further growth seems inevitable. Oil industry experts predict a continuation of the present 5 per cent annual increase in Free World crude oil demand until at least 1980. If present production trends continue, the Middle East may well produce 60 per cent of the crude requirements outside North America by 1980. To help put these figures in perspective, oil-producing countries within the Beirut Trade Commissioners' territory—Saudi Arabia, Kuwait, Iraq, Bahrain, Qatar, Abu Dhabi, Muscat and Syria—produced in 1967 three times as much as Venezuela and ten times as much as Canada.

**The continuing demand for petroleum implies a high level of international exploration activity and investment in other phases of the oil industry.** Cumulative capital investment in the world oil industry up to 1967 was estimated at \$166 billion. A further \$215 billion investment is expected by 1980 and the Middle East will have a major share of it. The Arabian

American Oil Company (ARAMCO) now purchases about \$80 million of equipment and supplies a year and the Kuwait Oil Company spends about \$12 million; as other companies expand, their purchases will probably approach these figures.

Much of the future expansion is expected to follow the pattern of investment of the eight international major oil companies which are linked by production, refining, transportation and marketing arrangements. Although many concessions have until recently been controlled by the "majors", the new trend is for smaller independent oil companies and state-owned or partly state-owned companies to sign concession agreements and initiate development programs. These new agreements are frequently more favorable to the host Governments than the usual 50-50 profit-sharing agreements signed by the "majors"; they often take the form of partnership, contracting or service agreements with the host country and the foreign company receives a share of less than 50 per cent. Since the oil industry has become the dominant influence on

the GNP of nearly all countries in the Middle East, further pressure for local control and participation is likely.

The "majors", the independents and the state-owned oil companies should offer a vast and growing market for Canadian engineers, contractors and manufacturers who specialize in selling to the oil industry. The purchasing procedures of the "majors" are perhaps the more complex. Although they usually have well established sources and considerable standardization of equipment and supplies, they are generally open to alternative offers if the exporter prequalifies his product with the customer's inspectors, can show competitive prices and delivery times, and can offer reliable after-sales service. A Canadian manufacturer who wishes to start selling a product to the "majors" must usually contact the field office, the main engineering office for product prequalification, and the North American purchasing office. Engineers and contractors must contact the field and main engineering offices. Proof of previous work with the "majors" and of previous overseas experience is often helpful. Local agents are usually required by law even though they may provide no technical services. Many tenders, especially for routine items like bits, valves, casing, drilling muds and chemicals are advertised only in the local press.

**The other group, the independent and state-owned or partly state-owned companies, may offer the best opportunities for Canadian firms.** With these companies, supply sources are often not so well established, which may make it easier for newer and smaller suppliers. Frequently, sales approaches need be made only to the field office, but with the independents, contacting purchasing and engineering offices in North America or Europe may also be necessary.

Both groups are using turnkey project tenders to a large extent. The Iraq National Oil Company, for example, recently called for tenders from 13 companies (none of which was British or U.S.) for a turnkey contract for the North Rumaila field which required a 120-km. pipeline and a storage and export installation. Firms invited to tender are usually taken from a preselected bidder list but sometimes, especially in the case of state-owned

companies, internationally advertised competitions are used. To be included on selected bidder lists, Canadian firms should register with the oil companies and for subcontract work they should also contact the major international design and construction companies which specialize largely in turnkey projects.

**Another recent trend in the Middle East is for foreign construction and oilfield services companies to go into partnership with local private or state-controlled organizations.** In Saudi Arabia, for example, a foreign oilwell contract drilling company went into partnership with private Saudi interests and a drilling company joined with the Saudi state-owned organization, General Petroleum & Mineral Organization (PETROMIN). PETROMIN also formed separate partnerships with foreign geophysical, tanker and marine construction companies and set up marketing, refinery and fertilizer companies in co-operation with other Saudi interests.

Several foreign firms supplying the industry have resident representatives in Beirut, Tehran or Kuwait who are able to assist their local agents in sales and technical matters. Other firms work only through a local commission agent; still others sell direct to the oil companies where direct sales are permitted. Some exporters maintain stocks in warehouses in Dammam, Kuwait or Dubai so that oil companies, drilling companies and other oilfield servicing firms can order supplies as needed.

**Here is a list of the oil companies active in the territory covered by the Trade Commissioners in Beirut, giving details of ownership and an indication of the scope of operations.** Generally speaking, the procurement of capital equipment is done at the head office. Equipment for regular maintenance programs is usually obtained by the local purchasing office at the plant.

#### **Saudi Arabia**

Arabian American Oil Co. (ARAMCO). Owned by Standard California 30 per cent, Standard N.J. 30 per cent, Texaco 30 per cent, Mobil 10 per cent. Established 1933. Main offices are in New York and Dharan. Has seismic program, drilling program, 1,200 miles of pipeline, loading facilities. Production in 1967 was 2,598,000

barrels a day; refinery capacity in 1967 was 255,000 barrels a day.

General Petroleum and Mineral Organization (PETROMIN). Owned by the Government of Saudi Arabia. Established 1962. Main office is in Riyadh. Has seismic program, drilling program. Refining capacity in 1967 was 12,000 barrels a day.

PETROMIN-AG1P (Phillips). Between 30 and 50 per cent owned by PETROMIN. Established 1967. Main office in Riyadh. Has seismic program, drilling program.

Société Auxiliaire de l'Entreprise de Recherches et d'Activités Pétrolières (AUXERAP). Exploration company owned by the Government of Saudi Arabia 40 per cent and AUXERAP 60 per cent. Established 1965. Main office is in Paris, France. Has seismic program, drilling program.

Sinclair Arabian Oil Co. Up to 50 per cent owned by PETROMIN. Established 1967. Main office is in the United States. Has seismic program, drilling program.

**Kuwait and Neutral Zone**  
Kuwait National Petroleum Company (KNPC). Owned 60 per cent by the Government of Kuwait and 40 per cent by Kuwaiti private interests. Established 1961. Main office is in Kuwait. Refinery capacity in 1967 was 95,000 barrels a day.

American Independent Oil Company (AMINOIL). Owned by Phillips Petroleum 37.34 per cent, Signal Oil and Gas 33.58 per cent, Ashland Oil and Refining 14.13 per cent, and others 14.95 per cent. Established 1948. Main office is in New York. Has seismic program, drilling program, 57 miles of pipeline, loading facility. Production in 1967 was 68,000 barrels a day; refinery capacity in 1967 was 110,000 barrels a day.

Arabian Oil Co. Ltd. (AOC). Owned by Japan Petroleum Trading Co. 80 per cent, Government of Saudi Arabia 10 per cent, Government of Kuwait 10 per cent. Established 1958. Main office is in Tokyo. Has seismic program, drilling program, 27 miles of pipeline, loading facility. Production in 1967 was 280,000 barrels a day; refinery capacity in 1967 was 30,000 barrels a day.

Kuwait Oil Co. Ltd. (KOC). Owned by British Petroleum Co. 50 per cent, Gulf Oil Corp. 50 per cent. Established 1934. Main office is in London, England. Has seismic program, drilling program, 220 miles of pipeline, loading facility. Production in 1967 was 2,292,000 barrels a day; refinery capacity in 1967 was 250,000 barrels a day.

Getty Oil Company. Owned by John Paul Getty (Senior) and other private shareholders. Established in 1949. Main office is in Los Angeles. Has seismic program, no drilling program, 25 miles of pipeline, loading facility. Production in 1967 was 68,000 barrels a day; refinery capacity in 1967 was 50,600 barrels a day.

Kuwait-Spanish Petroleum Company (KSPC). Owned by Kuwait National Petroleum 51 per cent, Hispanoil 49 per cent. Established 1967. Main office is in Kuwait. Has seismic program, no drilling program.

Kuwait Shell Petroleum Development Co. Ltd. Owned by Royal Dutch/Shell group. Established in 1961. Main office is in London, England.

#### **Iraq**

Iraq National Oil Co. (INOC). Owned by the Government of Iraq. Established 1964. Main office is in Baghdad. Has 80 miles of pipeline.

Government Oil Refineries Administration (GORA). Owned by the Government of Iraq. Established in 1952. Main office is in Baghdad. Refinery capacity in 1967 was 55,000 barrels a day.

Iraq Petroleum Co. (IPC). Owned by British Petroleum Co. 23.75 per cent, Royal Dutch/Shell 23.75 per cent, Compagnie Française des Pétroles 23.75 per cent, Near East Development 23.75 per cent, Participation and Explorations 5 per cent. Established in 1925. Main office is in London, England. Has seismic program, drilling program, 1,254 miles of pipeline, loading facility. Production in 1967 was 782,000 barrels a day.

Basra Petroleum Co. (BPC). Same ownership as Iraq Petroleum Co. Established in 1938. Main office is in London, England. Has seismic program, drilling program, 233 miles

of pipeline, loading facility. Production in 1967 was 414,000 barrels a day.

Mosul Petroleum Co. (MPC). Same ownership as Iraq Petroleum Co. Established in 1932. Main office is in London, England. Has seismic program, drilling program, 234 miles of pipeline, loading facility. Production in 1967 was 24,000 barrels a day.

Entreprise de Recherches et d'Activités Pétrolières (ERAP). Owned by ERAP 50 per cent, others 50 per cent. Established in 1967. Main office in Paris. Seismic and drilling programs.

#### **Bahrain**

Bahrain Petroleum Co. Ltd. (BAPCO). Owned by Standard California 50 per cent, Texaco 50 per cent. Established in 1934. Main office is in New York. Has seismic program, drilling program, 27 miles of pipeline, loading facility. Production in 1967 was 70,000 barrels a day; refinery capacity in 1967 was 250,000 barrels a day.

#### **Muscat**

Wintershall. Owned by Wintershall AG 65 per cent, others 35 per cent. Established in 1965. Main office is in Germany. Has seismic program, drilling program.

Petroleum Development (Oman) Limited (PDO). Owned by Royal Dutch/Shell 85 per cent, Compagnie Française des Pétroles 10 per cent, Participation and Explorations 5 per cent. Established in 1937. Main offices are in London, England, and Muscat. Has seismic program, drilling program, 174 miles of pipeline, loading facility. Production in 1967 was 150,000 barrels a day.

#### **Dubai**

Dubai Petroleum Company. Owned by Continental Oil 55 per cent, Deutsche Erdöl 22.5 per cent, Sun Oil Co. 22.5 per cent. Established in 1963. Main office is in New York. Has seismic and drilling programs.

Dubai Marine Areas Ltd. (DUMA). Owned by Continental Oil 35 per cent, British Petroleum 33.3 per cent, others 31.3 per cent. Established in 1952. Main office is in London, England. Has seismic program, drilling program, pipeline, loading facility capable of handling a million barrels a day.

#### **Qatar**

Qatar Petroleum Co. Ltd. (QPC). Owned by British Petroleum, Royal Dutch/Shell, Compagnie Française des Pétroles, Standard N.J. Established in 1935. Main office is in London, England. Has seismic program, drilling program, 108 miles of pipeline, loading facility. Production in 1967 was 180,000 barrels a day.

Shell Company of Qatar Ltd. Owned by Royal Dutch/Shell group. Established 1952. Main office is in London, England. Has seismic program, drilling program, 23 miles of pipeline, loading facility. Production in 1967 was 129,000 barrels a day.

Qatar Oil Company Ltd. (Japan). Owned by Tokyo Electrical Power, Kansai Electrical Power, Kansai Oil, Fuji Oil, others. Established in 1969. Main office is in Tokyo.

#### **Abu Dhabi**

Middle East Oil Company Limited. Owned by the Mitsubishi group. Established in 1968. Main office is in Tokyo. Has seismic program.

Abu Dhabi Petroleum Development Co. (APDC). Owned by Maruzen Oil 33.3 per cent, Daikyo Oil 33.3 per cent, Nippon Mining 33.3 per cent. Established in 1967. Main office is in Tokyo. Has seismic program, drilling program, 92 miles of pipeline.

Phillips Petroleum Co. Abu Dhabi. Owned by Phillips Petroleum 33.3 per cent, American Independent Oil Co. 33.3 per cent, AGIP Mineraria 33.3 per cent. Established in 1967. Main office is in Oklahoma. Has seismic program, drilling program.

Abu Dhabi Petroleum Company. Owned by British Petroleum 23.75 per cent, Royal Dutch/Shell 23.75 per cent, Compagnie Française des Pétroles 23.75 per cent, Near East Development 23.75 per cent, Participation and Explorations 5 per cent. Established in 1939. Main office is in London, England. Has seismic program, drilling program, pipeline, loading facility. Production in 1967 was 240,000 barrels a day.

Abu Dhabi Marine Areas Ltd. (ADMA). Owned by British Petroleum 66.6 per cent, Compagnie Française

des Pétroles 33.3 per cent. Established in 1953. Main office is in London, England. Has seismic program, drilling program, 79 miles of pipeline, loading facility. Production in 1967 was nil, in 1968, 174,000 barrels a day.

#### Ras al Khaima

Union of California. Established in 1969. Main office is in California. Has seismic program, drilling program.

#### Sharjah

Shell Sharjah. Owned by Royal Dutch/Shell group. Established in 1969. Main office is in London, England.

#### Fujairah

Shell-Bomin Bochumer. Owned by Shell Minerals Ltd. and Bochumer Minerals. Established in 1966. Main office is in London, England. Has seismic program, drilling program.

#### Umm al-Qaiwan

Shell Minerals Company (Umm al-Qaiwan). Owned by Royal Dutch/Shell group. Established in 1969. Main office in London, England. Has seismic program, drilling program.

#### Syria

General Petroleum Organization (GPO): Société des Pétroles Concordia S.A.R.L. Owned by Deutsche Erdol 80 per cent, Gerberhardt & Koenig 10 per cent, Den-Schliemann Minerale-olgesellschaft 10 per cent. Established in 1964. Main office is in Damascus. Has seismic program, drilling program, 383 miles of pipeline, loading facility. Production in 1967 was nil, in 1968 was 20,000 barrels a day; refinery capacity in 1967, 54,000 barrels a day.

Canadian engineers, contractors and exporters who are interested in inves-

tigating the many sales opportunities the Middle East oil industry offers should write to the Commercial Counsellor, Canadian Embassy, Rue Clemenceau, Alpha Building, P.O. Box 2300, Beirut, Lebanon, for a preliminary market assessment, information on purchasing procedures and suggestions about local commission agents. The Commercial Counsellor can also provide information on purchasing procedures of specific oil companies operating in the Middle East and the names of personnel to contact. In Canada, J. J. McKennirey, General Director, Machinery Branch, Department of Industry, Trade and Commerce, Ottawa, and W. Mackenzie Hall, Regional Manager, Department of Industry, Trade and Commerce, 802 Chancery Hall, 3 Sir Winston Churchill Square, Edmonton, Alberta, can supply these details.

## Ireland

Growth rate may slow down this year; exports have risen but imports continue to exceed them. Canada's sales are forecast to hold steady or decline slightly this year.

#### DONALD M. HOLTON

Commercial Counsellor, Dublin

"The year 1968 was the best in our economic history," the Minister of Finance for the Republic of Ireland pointed out in introducing the 1969/70 Current Budget. His budget statement gave the main objective of official economic policy during the past year as keeping the economy on the path of steady and substantial growth without imposing an undue strain on the balance of payments.

The Third Program for Economic and Social Development 1969/72 laid before each House of the Oireachtas (Parliament) in March 1969 forecasts an average annual rise of 4 per cent in the GNP over the four years. Industrial production is expected to expand by 6.5 per cent a year, agricultural production by 1.75 per cent, and the services sector by 3.3 per cent. Personal consumption is projected to

increase by 3.3 per cent a year, public consumption by 3.7 per cent, and investment by 6.8 per cent. Exports are expected to rise by 9 per cent a year in volume and from 1969 to 1972 the ratio of exports to GNP is expected to go up from 35.5 to 43 per cent. The projected increase in the volume of imports of 8.6 per cent a year would raise the ratio of imports to GNP from 41 per cent in 1969 to 49 per cent in 1972. The balance-of-payments deficit of \$32 million anticipated for 1972 (at 1968 prices) would equal the expected inflow of external capital. Employment should increase by a net 16,000, with a fall of 36,000 in the agricultural sector more than offset by a rise of 31,000 in industry and 21,000 in the rest of the economy. In the light of increased economic activity and employment,

emigration is expected to fall to an annual average of 12,000.

During the past year the economy achieved a growth rate of 5.5 per cent in real terms (the highest since World War II), up from 4.8 per cent for the previous year and a low of 1.1 per cent in 1966. This rapid growth was accompanied by a substantial deficit in the balance of payments on current account of £20 million, compared with a surplus of £15 million in 1967. This deficit on current account was, however, largely covered by long-term investment capital inflow and foreign exchange reserves dropped by only £8 million from the record at the end of 1967 of £295 million.

Industrial output is reported to have increased by 11 per cent in 1968 but there have been strikes and rumors

of strikes to threaten the terms of trade and consequently the smooth path of advance. Last February and March a five-week nationwide strike of maintenance craftsmen threw about 35,000 general workers out of work and the slowdown in industrial output is said to have cost the Republic about £7 million in exports alone. The fear is that the settlement of this strike could lead to higher wage demands in other quarters. This would have even more serious effects on costs, prices, exports and the rate of investment and thus slow down expansion.

The outlook for 1969 is for the growth rate to drop to 4½ per cent from 5½ in 1968, the downturn reflecting a slower rate of expansion in consumption, investment and exports. Even a rate of 4½ per cent may prove difficult to achieve should it become necessary to take action to contain inflation. Ireland's balance of payments has repeatedly shown itself sensitive to rising wages that lead to heavier reliance on imports and that do not reflect a corresponding increase in productivity, thus making Irish industry less competitive in foreign markets. This is particularly true of the British market to which Ireland sends almost 70 per cent of its exports.

Under the Anglo-Irish Free Trade Agreement, between 1965 and 1968 the total trade between the two countries has risen by 38 per cent a year in value, and Irish exports to Britain from £160 million to £234 million. Exports to Britain of manufactured goods alone rose by 78 per cent. Such dependence on the British market is of some concern and the Government is making stronger efforts to diversify exports.

Although total exports rose in 1968 from £285 million to £332.5 million and for the first time industrial products constituted more than 50 per cent of the total, imports also rose from £392.3 million to £489.5 million, increasing the import excess by £49.7 million. Capital and consumer goods were the leading imports. Official statistics reveal that for the first three months of 1969 imports continued to outpace exports. Exports increased by £5.9 million to £80.4 million but imports jumped by £18.4 million to £133.7 million. The import excess of £53.3 million was £12.5 million more than in the same quarter of the year earlier. The estimate is that



One of Canada's major exports to Ireland is aluminum in all forms. The automatic machines in this plant are drawing aluminum wire to be later stranded.

TABLE 1  
IRELAND'S TRADE BY AREAS

Area	£'000 Imports	Exports	Balance
Member countries of EFTA	269,296	234,847	- 34,448
Britain	227,555	187,833	- 39,722
Northern Ireland	19,938	42,936	+ 22,998
Other EFTA countries	21,803	4,079	- 17,725
Member countries of EEC	80,293	29,565	- 50,728
Other OECD member countries in Europe	3,782	2,173	- 1,609
Dollar countries	46,849	39,172	- 7,677
United States (including U.S. Forces overseas)	36,125	32,151	- 3,974
Canada	9,437	4,085	- 5,351
Re-imports and temporary domestic exports	7,712	7,790	+ 79
All other areas	81,585	18,925	- 62,660
<b>Totals</b>	<b>489,517</b>	<b>332,473</b>	<b>-157,043</b>

price increases accounted for approximately £7.5 million of the £18.4 million rise in imports and for some £2.2 million of the £5.9 million increase in exports.

A recent order which came into force on July 1, 1969, under the Imposition of Duties Act provides for the fourth annual reduction in protective duties and in protective elements in the revenue duties on British goods, in accord with the Anglo-Irish Free Trade Agreement. Special tariff concessions in favor of Northern Ireland goods have been maintained.

Of perhaps greater importance to Canada, however, is the fact that the order also implements the remaining tariff concessions arising from Ireland's accession to the General Agreement on Tariffs and Trade (GATT) and transfers the licensing powers of various types on wheat products from the Minister for Industry and Commerce to the Minister for Agriculture and Fisheries.

Table 1 depicts trade by major trading areas and Table 2 its composition by main commodity groups and the trends of trade in 1967 and 1968.

Canada's exports to Ireland, according to DBS statistics, declined substantially in 1968 to \$11.12 million from \$15.64 million in 1967. Official Irish statistics, however, indicate that imports from Canada increased from £8,998 million (\$23,124,860) to £9,437 million (\$24,253,090) over the same period. DBS figures on Canada's exports to Ireland, as to other countries, reflect f.o.b. values, but Irish statistics give imports from Canada and elsewhere at c.i.f. values. Moreover, many imports from Canada find their way into Ireland from Britain, from which approximately 50 per cent of Irish imports come and from the entrepôt and transshipment trade of northern European ports like Antwerp and Rotterdam. Exports of wheat to Ireland for the crop year 1967/68 are an example. The Irish figures, actually in line with Irish import requirements of Canadian wheat, were more than double the Canadian figures—3,237,000 bushels compared with 1,434,882 bushels as recorded in Canada.

The main commodities as compiled by DBS are given in Table 3. Among the commodities with a value less than \$50,000 with larger sales to Ireland in 1968 were papermakers' felts, stationers' supplies and sundries, corn

(canned and frozen), whisky, jewellery components and cases, feeds of animal origin, and tire and tube repair materials.

Any falling-off in our sales to Ireland or limitation on growth during 1969 would probably result in large part from three major developments. The first is the devaluation of the pound sterling and simultaneously of the Irish pound which adversely affected Canadian exports of all products to this country, but especially those also available from alternative sources within the sterling area. The second could be the bumper field crops of 1968 which, among other things, led the Government to require that a minimum of 75 per cent of native highly subsidized soft wheat be used in the bread grist as against 55 per cent last year. (The remainder, in hard wheat, is normally imported largely from Canada.) The third development is less Canadian interest in the Irish market, either because of competition or lack of supplies in the face of booming sales in markets closer to home. This applies particularly to sales of lumber: the demand in Ireland has greatly exceeded acceptable offers from Canada.

TABLE 3

SELECTED CANADIAN EXPORTS TO IRELAND

	Cdn.\$	
	1967	1968
Aluminum (all forms)	3,965,374	2,025,814
Newsprint	1,571,797	1,567,772
Wheat (except seed)	2,702,446	1,467,331
Salmon (canned)	992,496	766,509
Lumber	1,030,186	483,608
Broadwoven fabrics	224,000	483,403
Industrial machinery, electrical equipment and parts	833,185	435,878
Copper (all forms)	99,457	400,809
Wood pulp	471,385	386,272
Tobacco bright Virginia (flue-cured)	337,134	308,114
Nickel, lead and zinc (in all forms)	27,112	197,381
Papers and board, excluding newsprint	60,456	179,752
Hardware and tools	123,439	162,349
Oats	284,756	161,866
Iron and steel (in all forms)	297,867	148,640
Fire brick and similar shapes	132,718	145,609
Wearing apparel and accessories, excluding fur goods	94,557	141,534
Sardines (canned)	63,588	117,810
Apples and crab-apples (fresh)	379,584	102,084
Manmade fibers including yarn, thread and waste	55,796	86,129
Chemicals	25,835	85,407
Asbestos	180,748	84,398
Plastic and synthetic rubber	64,156	84,167
Animal hides and skins	7,652	82,245
Commercial and household equipment, appliances and parts	173,477	77,790
Seeds	185,044	65,393
Leather	43,715	64,880
Transportation equipment, including marine	24,795	60,926
Logs	14,726	58,884

Source: DBS

TABLE 2

IRELAND'S TRADE BY MAIN COMMODITY GROUPS

Exports	£'000		Imports	£'000	
	1967	1968		1967	1968
Live animals, food and food preparations	153,296	164,103	Live animals, food and food preparations	59,913	69,189
Beverages and tobacco	9,661	11,726	Beverages and tobacco	8,951	12,640
Raw materials except fuels	15,658	21,799	Raw materials except fuels	28,441	36,513
Mineral fuels, lubricants and similar materials	6,341	3,467	Mineral fuels, lubricants and related materials	37,545	40,930
Animal and vegetable oils and fats, natural and processed	831	948	Animal and vegetable oils and fats, natural and processed	1,919	2,568
Chemicals	8,442	12,568	Chemicals	35,800	47,957
Manufactured goods classified by material	32,301	43,188	Manufactured goods classified by material	80,379	103,800
Machinery and transport equipment	13,675	19,475	Machinery and transport equipment	92,342	119,060
Manufactured articles n.e.s.	24,046	32,002	Manufactured articles n.e.s.	27,212	37,353
Other, including parcel post, special transactions and re-exports	20,834	23,195	Other, including parcel post and special transactions	19,759	19,505
<b>Total exports</b>	<b>285,086</b>	<b>332,473</b>	<b>Total imports</b>	<b>392,260</b>	<b>489,517</b>

Source: Republic of Ireland Central Statistics Office.

# Businessman's Bookshelf

## Management and Machiavelli

For some reason, the name Machiavelli tends to evoke the notion of cunning rather than of shrewdness. The author, a native Londoner and Cambridge graduate in classics, explains that *The Prince* was in fact an analysis of the practices which brought political success in the past in order to deduce from them what principles ought to be followed for political success in the present. He goes on to tell us that political institutions and business corporations have a great deal in common.

The art of management did not appear out of the blue. The chief executive of a conglomerate or the head of a department with too many restless assistants will find a variety of solutions (and their consequences) in the casebook of political history. *Management and Machiavelli* "is an attempt to detach managers, if only briefly, from their preoccupation with Inventory Management and Discounted Cash Flow and Project Evaluation and Review Techniques, and link them up with their true predecessors, the Kings and Princes and Prime Ministers and Generals, the Barons and Cardinals and Courtiers, who have been trying to cope with the same problems for the past two or three thousand years."

Anthony Jay's own experience with the BBC and now as a free lance TV producer and writer makes this more than a mere textbook. It is stimulating and sometimes highly entertaining. The chapters on creativity are especially significant (it is no accident that the book is on the reading list for Public Service management courses) and his exposition of Gresham's Law as applied to management makes it plain that bad managers do indeed drive out the good. *Management and Machiavelli* deserves a place beside Peter Drucker's books—somewhere where it can be browsed through at leisure and often; it isn't a cure-all for sudden crises.

By Anthony Jay; published by Hodder and Stoughton Limited; 224 pages, \$5.50 in Canada.

## Afrique 1969

The first page, appropriately, carries a picture of the African continent taken from Apollo 8. Communications have made the world everybody's oyster—we know within the hour that a disaster has occurred here and that a new surgical operation has succeeded there. But we know less and less about our immediate neighbors. We still have to make a deliberate and sustained effort if we want to learn about the vast bulk of hu-

man experience that lies below the surface and which the media prefer to ignore.

In his introduction, the editor underlines the stability of Africa which escapes those who only see the headlines. Many African heads of state have been in power for ten years, some of them for twenty. They are not all young bloods: four are over seventy and a dozen are in their sixties, although the expectation of life on the continent is below fifty years. Violent political changes generally affect only a handful of people, leaving the greater part of the administration unchanged. The big problem is not instability but the growing burden on the men who have to run their countries until the new generation is trained to help them.

*Afrique 1969* can be roughly divided into three parts. The first 190 pages consist of general studies, the next 170 describe individual projects, and the last 350 deal with the countries and include full-page color maps showing industries and natural resources. The information is set out in a clear, orderly fashion and there is much informative advertising material. (Although the book is in French, it covers the whole continent.)

Edited by Bechir Ben Yahmed; published in 1969 by Société Presse Africaine Associée, 51 avenue des Ternes, Paris 17e., France; 641 pages, FF 20.

## Etiquette for the Businessman at Home and Abroad

Mary Bosticco's book is of very limited use to the Canadian businessman but it provides an interesting sidelight on the mores of the British business set. Twenty-seven pages are given to "Order of Precedence and Forms of Address" and "Visiting Cards and Invitations" but "The Businessman Abroad" rates only twenty-eight. It is rather like despatching a jet pilot with a manual of office procedures and a child's atlas.

Some of Britain's most successful businessmen don't belong to the business set at all. The Beatles and Twiggy are outstanding examples of non-conformers. There are many more of them in the new industries and in trades which are considered to be "a bit infra-dig". If you are a likeable person and have a good product to sell, plain good manners will see you through most situations. Besides, there is usually someone you can ask or watch.

By Mary Bosticco; published by Business Publications Limited, London, England; 201 pages, £2 5s 0d.

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Provinces of Natal, Orange Free State,  
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Botswana, Comoro Archipelago, Lesotho,  
Malagasy, Mauritius, Mozambique, Reunion,  
Swaziland

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

W. D. Wallace  
Trade Commissioner

*Cable:* CANADIAN

*Phone:* 2-5134/5

*Telex:* 7060 (5-7060 CT)

*Territory:*

Cape Province. Other countries:  
St. Helena, South West Africa

## SPAIN

Commercial Counsellor  
Canadian Embassy  
Apartado 117  
Edificio Espana  
Avenida de Jose Antonio 88  
Madrid, Spain

Commercial Counsellor

*Cable:* CANADIAN

*Phone:* 247-54-00

*Telex:* 27347 (DOMCA E)

*Territory:*

Provinces outside the peninsula—Balearic  
Islands, Canary Islands, Spanish Sahara.  
Other countries: Equatorial Guinea.

## SWEDEN

Commercial Counsellor  
Canadian Embassy  
P.O. Box 14042  
Kungsgatan 24  
S-104 40 Stockholm, Sweden

M. B. Bursey  
Commercial Counsellor

E. C. H. Shelly  
Assistant Commercial Secretary

*Cable:* CANADIAN

*Phone:* 23-79-20

*Telex:* 10687 (10687 DOMCAN S)

*Territory:*

Finland

**SWITZERLAND**

**Commercial Counsellor**  
**Canadian Embassy**  
 Kirchenfeldstrasse 88  
 3000 Berne, Switzerland

H. E. Campbell  
 Commercial Counsellor

D. T. Johnston  
 Assistant Commercial Secretary

*Cable:* CANADIAN

*Phone:* 44-63-81

*Telex:* 32489 (DMCNA CH)

*Territory:*  
 Liechtenstein, Tunisia

**THAILAND**

**Commercial Secretary and Consul**  
**Canadian Embassy**  
 P.O. Box 2090  
 Thal Farmers Bank Building, 7th Floor  
 142 Silom Road  
 Bangkok, Thailand

C. E. Rufelds  
 Commercial Secretary and Consul

*Phone:* 32956

*Telex:* 2277 (DOMCAN BKK)

**TRINIDAD AND TOBAGO**

**Commercial Counsellor**  
**Office of the High Commissioner for Canada**

P.O. Box 1246  
 Colonial Building  
 72 South Quay  
 Port-of-Spain, Trinidad

K. G. Ramsay  
 Commercial Counsellor

D. J. McJanet  
 Commercial Secretary

J. J. M. C. Lavoie  
 Assistant Commercial Secretary

*Cable:* CANADIAN

*Phone:* 34787

*Telex:* 226 (DOMCAN POS 226)

*Territory:*  
 Barbados, French Guiana, Guadeloupe,  
 Guyana, Leeward and Windward Islands,  
 Martinique, Surinam

**TURKEY**

**Commercial Secretary**  
**Canadian Embassy**  
 Vail Dr. Resit Cadessi 52  
 Ankara, Turkey

D. J. S. Winfield  
 Commercial Secretary

*Phone:* 12-24-48

*Telex:* 69 (DOMCAN ANKARA)

**UNION OF SOVIET SOCIALIST  
REPUBLICS**

**Commercial Counsellor**  
**Canadian Embassy**  
 23 Starokonyushenny Pereulok  
 Moscow, U.S.S.R.

R. A. Bull  
 Commercial Counsellor

J. D. Welsh  
 Assistant Commercial Secretary

*Cable:* CANAD

*Phone:* 241-90-34, 241-91-55

*Telex:* 401 (DOMCAN MSK)

**UNITED ARAB REPUBLIC**

**Commercial Division**  
**Canadian Embassy**  
 Kasr el Douhara Post Office  
 6 Sharia Rouston Pasha  
 Garden City  
 Cairo, Egypt

*Cable:* CANADIAN

*Phone:* 23110

*Territory:*  
 Sudan

**UNITED NATIONS**

**Permanent Mission of Canada to the United Nations**  
 866 United Nations Plaza, Suite 250  
 New York, N.Y. 10017

R. D. Lucas  
 First Secretary

D. G. Adam  
 Third Secretary

*Cable:* CANINUN NYK

*Phone:* 751-5600 (Area Code 212)

*Telex:* 00126228 (CANINUN NYK)

**UNITED STATES**

**Commercial Counsellor**  
**Canadian Embassy**  
 1746 Massachusetts Avenue, N.W.  
 Washington, D.C. 20036

W. G. Pybus  
 Commercial Counsellor

W. F. Hillhouse  
 Commercial Counsellor (Agriculture)

H. C. Armstrong  
 Commercial Counsellor

G. H. Musgrove  
 Assistant Commercial Secretary  
 (Agriculture)

J. D. Belisle  
 Assistant Commercial Secretary

*Cable:* CANADIAN

*Phone:* 332-1011 (Area Code 202)

*Telex:* 0089664 (DOMCAN WSH)

*Territory:*  
 District of Columbia

**Deputy Consul General (Commercial)**  
**Canadian Consulate General**  
 680 Fifth Avenue  
 New York City, N.Y. 10019

S. B. McDowall  
 Consul and Assistant Trade Commissioner

W. G. Roberts  
 Consul and Assistant Trade Commissioner

R. J. G. Ledoux  
 Vice Consul and  
 Assistant Trade Commissioner

D. Keddie  
 Vice Consul and  
 Assistant Trade Commissioner

C. K. Marchant  
 Vice Consul and  
 Assistant Trade Commissioner

D. J. Bachand  
 Vice Consul and  
 Assistant Trade Commissioner

*Cable:* CANTRACOM  
*Phone:* 586-2400 (Area Code 212)

*Night Line:* 586-2321

*Telex:* 00126242 (DOMCAN NYK)

*Territory:*  
 States of Connecticut, New Jersey (twelve  
 northern counties), New York.  
 Other countries: Bermuda.

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

W. R. Van  
 Consul and Senior Trade Commissioner

K. R. Higham  
 Consul and Trade Commissioner

J. N. R. Ferland  
 Vice Consul and  
 Assistant Trade Commissioner

*Phone:* 262-3760 (Area Code 617)

*Telex:* 0094567 (DOMCAN BSN)

*Territory:*  
 States of Maine, Massachusetts, New  
 Hampshire, Rhode Island, Vermont.  
 Other countries: St. Pierre and Miquelon.

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

R. D. Sirrs  
 Consul and Senior Trade Commissioner

J. A. Doyle  
 Consul and Trade Commissioner

Z. W. Burianyk  
 Consul and  
 Assistant Trade Commissioner

K. G. DeWolf  
 Vice Consul and  
 Assistant Trade Commissioner

A. J. G. Dallaire  
 Vice Consul and  
 Assistant Trade Commissioner

*Phone:* 427-1031 (Area Code 312)

*Telex:* 00254171 (DOMCAN CGO)

*Territory:*  
 States of Illinois, Indiana, Iowa, Kentucky,  
 Minnesota, Missouri, Nebraska, North  
 Dakota, South Dakota, Wisconsin

(continued)

## UNITED STATES

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

D. A. B. Marshall  
Consul and Trade Commissioner

C. R. Donley  
Vice Consul and  
Assistant Trade Commissioner

J.-G. M. Tardif,  
Vice Consul and  
Assistant Trade Commissioner

Phone: 861-1660 (Area Code 216)  
Telex: 00985364 (DOMCAN CLV)

Territory:  
State of Ohio

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

C. M. Forsyth-Smith  
Consul and Trade Commissioner

J. A. Langley  
Vice Consul and  
Assistant Trade Commissioner

R. C. Lee  
Vice Consul and  
Assistant Trade Commissioner

Phone: 742-8031 (Area Code 214)  
Telex: 00732637 (DOMCAN DAL)

Territory:  
States of Texas, Arkansas, New Mexico,  
Oklahoma

Consul and Trade Commissioner  
Canadian Consulate  
1920 First Federal Building  
1001 Woodward Avenue  
Detroit, Michigan, 48226

J. D. Blackwood  
Consul and Trade Commissioner

J. A. Sotvedt  
Vice Consul and  
Assistant Trade Commissioner

R. J. P. Archambault  
Vice Consul and  
Assistant Trade Commissioner

W. B. Schumacher  
Vice Consul and  
Assistant Trade Commissioner

Phone: 965-2811 (Area Code 313)  
Telex: 0023445 (DOMCAN DET)

Territory:  
States of Michigan and Indiana

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

V. B. Chew  
Consul and Trade Commissioner

S. F. Pattee  
Vice Consul and  
Assistant Trade Commissioner

D. M. Lawson  
Vice Consul and  
Assistant Trade Commissioner

Phone: 627-9511 (Area Code 213)

Telex: 00674119 (DOMCAN LSA)

Territory:  
States of Arizona, California, (ten southern  
counties), Clark County in Nevada

Consul and Trade Commissioner  
Commercial Division

Canadian Consulate General  
2110 International Trade Mart  
2 Canal Street  
New Orleans, Louisiana 70130

W. J. Millyard  
Consul and Trade Commissioner

W. M. Maybee  
Vice Consul and  
Assistant Trade Commissioner

Phone: Jackson 5-2136, 5-2137  
(Area Code 504)

Telex: 0058237 (DOMCAN NLN)

Territory:  
States of Alabama, Florida, Georgia,  
Louisiana, Mississippi, North Carolina,  
South Carolina, Tennessee

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

R. V. N. Gordon  
Consul and Trade Commissioner

J. N. Grantham  
Vice Consul and  
Assistant Trade Commissioner

Cable: CANADIAN

Phone: LOcust 35838 (Area Code 215)

Telex: 00845266 (DOMCAN PHA)

Territory:  
States of Delaware, Maryland, New Jersey  
(nine southern counties), Pennsylvania,  
Virginia, West Virginia

Consul and Trade Commissioner  
Commercial Division

Canadian Consulate General  
One Maritime Plaza  
Golden Gateway Center  
San Francisco, California 94111

R. M. Dawson  
Consul and Trade Commissioner

E. P. Rigby  
Vice Consul and  
Assistant Trade Commissioner

J. D. R. Roy  
Vice Consul and  
Assistant Trade Commissioner

Phone: 981-2670 (Area Code 415)

Telex: 0034321 (DOMCAN SFO)

Territory:  
States of California (except the ten southern  
counties), Colorado, Hawaii, Nevada  
(except Clark County), Utah, Wyoming

Consul and Trade Commissioner  
Canadian Consulate General  
1305 Tower Building  
Seventh Avenue and Olive Way  
Seattle, Washington 98101

E. E. Price  
Consul and Trade Commissioner

W. A. MacKenzie  
Vice Consul and  
Assistant Trade Commissioner

Phone: MUtual 2-3515 (Area Code 206)

Telex: 0032462 (DOMCAN SEA)

Territory:  
States of Alaska, Idaho, Montana, Oregon,  
Washington

## URUGUAY

Commercial Division  
Canadian Embassy  
Casilla Postal 852  
1005 Calle Prudencia Vasquez y Vega  
Montevideo, Uruguay

Cable: CANADIAN

Phone: 7 68 18

Telex: 398078 (DOMCAN MVD)

Territory:  
Falkland Islands

## VENEZUELA

Commercial Counsellor  
Canadian Embassy  
Apartado del Este 62302  
Avenida La Estancia No. 10  
Ciudad Commercial Tamanaco  
Caracas, Venezuela

J. H. Bailey  
Commercial Counsellor

D. G. Nelson  
Assistant Commercial Secretary

F. M. G. Sullivan  
Assistant Commercial Secretary

Cable: CANADIAN

Phone: 32.40.41/44

Telex: 877 (877 DOMCAN)

Territory:  
Netherlands Antilles

## YUGOSLAVIA

Commercial Secretary  
Canadian Embassy  
Proleterskih Brigada 69  
Belgrade, Yugoslavia

R. D. P. Lee  
Commercial Secretary

Phone: 44-301

Telex: 11137 (YU DOMCA)

# Markets in Brief

## Libya

**Area**  
680,000 square miles.

**Population**  
1.6 million.

**Climate**  
On the coast the sea moderates the extremes of the desert making the climate pleasant except in July and August. Inland, it is hot and dry in the day and cool at night.

**Language**  
Arabic. Italian is spoken by a fair number in Tripoli. English is understood in business and government circles.

**Currency**  
Libyan pound; one Libyan pound equals approximately Cdn. \$3.00.

**Foreign exchange and import regulations**  
Open general import licences are issued to Libyan-owned firms. There are a limited number of items, mostly agricultural, that cannot be imported except with a special permit. A permit is necessary for the transfer of foreign exchange.

**Weights and measures**  
Metric system.

**Capital**  
Libya has two capitals, Tripoli and Benghazi.

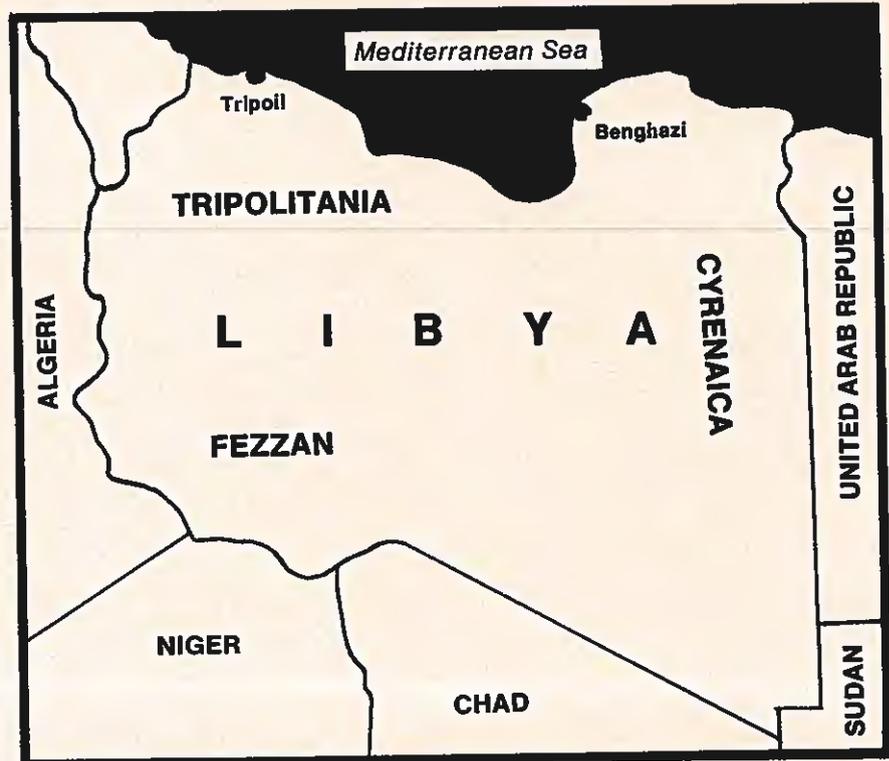
**Chief ports**  
Tripoli and Benghazi.

**Marketing centers**  
Tripoli (population) 350,000; Benghazi 150,000.

**Economy**  
The discovery of oil in 1956 has transformed the Libyan economy. Oil exports in 1967 were over \$1.2 billion, bringing revenues to the Libyan Government of some \$800 million in 1968. Other exports consist almost entirely of agricultural produce.

**Total Libyan imports**  
1967—Cdn. \$510 million; 1966—Cdn. \$433 million.

**Chief imports**  
Finished products such as motor vehicles and parts, machinery, tubes and pipes, gas generators; garments; food products.



**Chief suppliers**  
(Cdn.\$ million) 1967—Italy 150, United States 64, Britain 59, West Germany 39, France 30, Netherlands 21, Japan 20.

**Value of imports from Canada**  
1968—Cdn.\$825,998; 1967—Cdn.\$1.1 million; 1966—Cdn.\$695,428.

**Chief imports from Canada**  
(Cdn.\$'000) 1968—prefab buildings, structures and parts n.e.s. 192; tobacco 154; agricultural implements 53.

**Total Libyan exports**  
1967—Cdn.\$1,250 million; 1966—Cdn. \$1,064 million.

**Chief exports**  
1967—oil, hides and skins, peanuts, scrap metal, almonds and citrus fruits.

**Chief markets**  
95 per cent of crude oil exports go to EEC countries, Britain, Spain and the United States. Some 67 per cent of other exports go to Italy and Yugoslavia.

**Value of Canadian purchases**  
1968—Cdn.\$275; 1967—Cdn.\$11.3 million; 1966—Cdn.\$10.9 million.

**Chief Canadian purchases**  
Crude petroleum.

**Prices**  
Quote in U.S. dollars, c.i.f. Tripoli or Benghazi.

**Usual terms of payment**  
Sight up to 90 days.

**Samples**  
Duty is payable if of commercial value. Otherwise, a deposit returned on export of the samples may be required.

**Visas**  
A valid passport bearing a visa is required. The visa is normally valid for one entry within a period of one month from the date of issue.

**Import controls, documentation, customs tariffs, marketing and labelling**  
Consult the Office of Area Relations, Department of Industry, Trade and Commerce, Ottawa.

**Correspondence**  
Airmail only; letters 25 cents per half ounce.

**For detailed information on this market write to**  
European Division, Office of Area Relations, Department of Industry, Trade and Commerce, Ottawa or  
Minister-Counsellor (Commercial), Canadian Embassy, Via B.G. de Rossi 27, 00161 Rome, Italy.

# Visiting BLEU

Come to Brussels if you want to develop sales in the active Belgian-Luxembourg market. Don't come cold; give the Trade Commissioners a chance to help you plan a visit that will prove to be both pleasant and profitable.

J. C. POOLE

Assistant Commercial Secretary, Brussels

Business visitors to Europe should include Belgium on their itinerary, not only because it is a \$127 million market for Canadian goods but also because of its importance as a gateway for products flowing to many markets in Eastern and Western Europe from all parts of the world. Antwerp has become the second largest port in Europe, with maritime freight traffic for 1968 estimated at 72 million tons. Brussels, the capital of Belgium, is the home of the European Economic Community and on the outskirts of the city is the headquarters of the North Atlantic Treaty Organization. The military arm of NATO, Supreme Headquarters, Allied Powers in Europe, is located in southern Belgium. The importance of the Belgo-Luxembourg Economic Union far exceeds its small size (12,755 square miles), as these facts demonstrate.

The pattern of Canada's export trade with BLEU has been changing in recent years. In 1958 cereals constituted about 50 per cent of our shipments; by 1968, they made up only 15 per cent. Exports of both metallic and non-metallic minerals have increased sharply and lead, zinc and copper, bronze and brass shipments are large. At the same time, opportunities for selling manufactured and consumer products are improving now that the Belgian economy has recovered from the slowdown of 1965 to 1967. Fish products, particularly canned and frozen salmon, lobsters and crab, are in strong demand. So are building products, such as roofing materials, bathroom accessories, floor coverings, etc. As a general rule, the products that appeal to Belgians must be of good quality and preferably unique to some degree. If your firm has something to offer in this market, start the ball rolling by visiting it yourself.

A few facts about the country may be useful. Belgium is made up of nine

provinces—four Flemish-speaking ones in the north, four French-speaking ones in the south, and the bilingual province of Brabant in the center, where the capital, Brussels, is located. The country achieved separation from the Netherlands and independence in 1830 and Leopold the First, a German prince, became King of Belgium. If you would like to read more about Belgium, its history, economy and culture, the Belgian Embassy in Canada (85 Range Road, Ottawa 2) will be happy to supply you with material.

**Writing a letter to the Canadian Commercial Counsellor in Brussels should be the first step in planning a productive visit.** The office is ready to help any Canadian businessman who comes, but those who turn up without previous warning sometimes run into problems in obtaining hotel accommodation and in making appointments with either (or both) potential agents and potential customers. It is best to give us two or three weeks' lead time. Tell us in your initial letter about your product, include c.i.f. prices Antwerp, and if possible, put weights and measurements in the metric system. List other markets in which you are selling and the type of customers in which you are interested. Send us some literature or samples when this is practical. Then we can do a bit of prospecting for you before you touch down in Brussels.

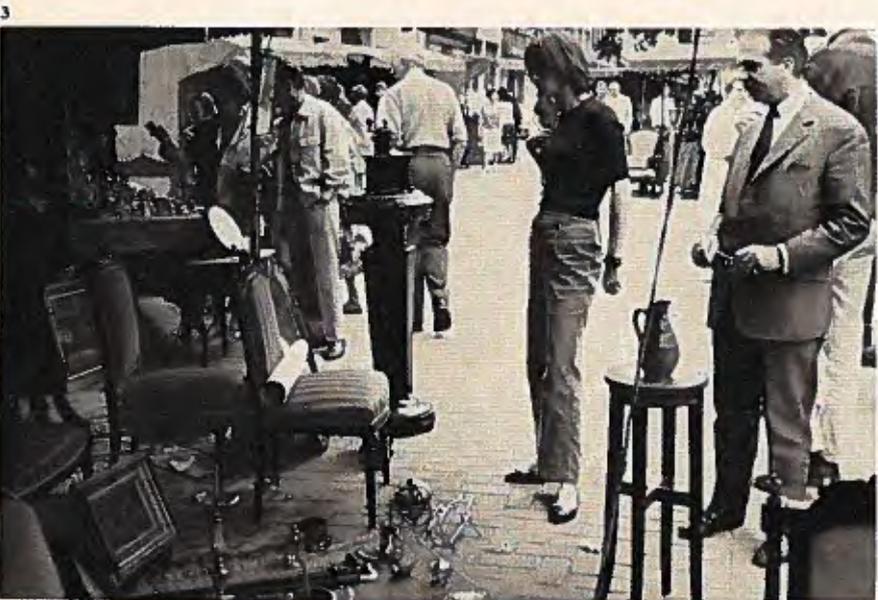
July and August are not good months for business visits, however pleasant they may be for the tourist. Many businesses have personnel on holiday and are operating at minimum strength. In addition, hotel accommodation is often fully booked because of the influx of tourists. In planning a trip at other times of the year, keep in mind the major holidays. These are Easter Monday, Labor Day (May 1), Ascension Day (May 15), Whit Monday (May 26), All Saints Day (November

1) and Armistice Day (November 11). **Spring and fall are probably the best times to come, but the winters are relatively mild and a good time to transact business,** provided that you are prepared for a good deal of rain. Be sure to bring a raincoat and umbrella at any time of year.

Air Canada, Canadian Pacific Airlines, Sabena and KLM all fly to Belgium. Canadian Pacific flies directly from Vancouver to Amsterdam three to seven times a week, depending on the season, and the cost, economy, is \$574 in the low season and \$628 in the high season, one way on a 21-day ticket. The trip from Amsterdam to Brussels takes only 45 minutes. Air Canada introduced at the end of April a direct flight on Tuesdays and Fridays from Toronto to Brussels, with a stop at Montreal. One-way, economy class, 21-day excursion is \$262 in the low season (beginning August 3) and \$310 in the high season. This means that both passengers and cargo loaded at Toronto continue to Brussels without changing planes. Most travellers will want to combine a trip to Belgium with visits to France, Germany and the Netherlands. The major cities in these three countries are only half an hour away by air and less than three hours by car from Brussels. A car ferry from Ostend crosses the English Channel or there are half-hour flights from Brussels to London.

**In hotels, Brussels provides both the traditional European décor or the more functional modern-American style.** The recommended hotels in Brussels and Antwerp are listed in the box, with room rates and some comments.

For most businessmen looking into markets in Belgium, the Brussels office can arrange a good two- to three-day program that will meet their needs; complex negotiations will naturally take longer. This program will be



1. This is Antwerp, Belgium's main port and its second largest city, about 40 miles from Brussels. It is in the Flemish-speaking part of the country.

2. One of the interesting sights for the visitor is the fish market in Ostend. There shopkeepers and housewives come to buy the day's catch. The market woman in the center of the picture seems to be driving a hard bargain with her feminine customer.

3. If the traveller is in Brussels on a Sunday morning, the place to visit is the Antique Market. Held in a square called Grand Soblon, it's the place to look for old maps, carved furniture, antique pistols, and other collectors' items. Belgians as well as tourists flock to the market.

4. Every visitor to Belgium photographs Grand Place, in the heart of Brussels, with its beautiful mediaeval buildings. Several of the best hotels are also located on Grand Place.



*One of the lovely areas of Belgium is in the neighborhood of Bruges. This peaceful scene is part of the Bruges-Sluis Canal in West Flanders Province.*

centered largely in Brussels, but some visitors will also want to go to Antwerp, Belgium's second commercial center, especially if they want to sell industrial products. Train service to Antwerp is fast but the Canadian may feel when he arrives that he is miles away in another country and not just 40 miles outside the capital. Flemish, not French, is the language here and the road signs are in Flemish. (In selling to the Belgians it is important to recognize these regional differences within BLEU because they have an important influence on advertising, packaging, etc.) Those who want to sell fish products should also go to the Ghent-Bruges-Ostend area; Canadians are already selling frozen and fresh salmon, Atlantic fish and Queen crab to the Belgian market. If time is not a problem, rent a car and spend a day and a half covering this triangle, staying overnight in either Bruges or Ghent, both beautiful cities.

**Getting about in Belgium is simple.** Trains are rapid and efficient and taxis are not expensive. The initial charge is 15 Belgian francs plus 8 francs per kilometer. On trips over 50 kilometers, there may be a 20 per cent reduction. (An easy method of conversion of Belgian francs to the U.S. dollar is to double the francs—50 francs make one U.S. dollar.) Belgian taxi-drivers are descended from the great entrepreneurs of the days of the Hanseatic League and demand a 20 per cent tip; this

holds good everywhere in Belgium.

Cars can be rented from Tilden International, Hertz, Auto Technique, and Avis, all in Brussels. The charge for a Plymouth Valiant is \$9 a day plus 10 cents per kilometer and for a Mercedes 200 E \$8 a day plus 8 cents per kilometer in the off season, or 10 cents in the tourist season.

**Canadian businessmen will find that members of the business community here speak either English or French.**

In the Flemish-speaking provinces to the north of Brussels discussions will usually be in English and in the provinces to the south, in French. In Brussels itself, the official languages are French and Flemish but many Belgians also have some knowledge of English. The existence of two distinct languages and cultures in such a small area often amazes the North American. In fact, the names of towns in French and Flemish sometimes do not resemble each other at all, and this may be confusing if you are travelling by road. In a Flemish-speaking area, you may be following road signs to the town of Bergen but upon reaching a French-speaking area, signs direct you to Mons, the same town by its French name. Similarly, Tournai, Anvers and Liège in French become Doornik, Antwerpen and Luik in Flemish.

**The appointment of an agent is the accepted approach to this market and during an initial visit the Canadian**

will probably devote time to the selection of a good one. Direct selling to buyers is not the usual method of doing business. Generally only the large department and chain stores purchase directly from exporters and they require a good deal of follow-up on the seller's part, frequent visits, and first class service. Agents sometimes insist on a franchise to cover the three BENELUX countries—Belgium, the Netherlands, and Luxembourg. Experience has shown, however, that the appointment of two agents, one in the Netherlands and one in Belgium, better serves the interests of the Canadian exporter. Whether or not a separate agent is needed in Luxembourg depends on the product; the linguistic division within Belgium need not be taken into account in selecting an agent. Belgian importers expect to do business on cash against documents terms; they do not favor irrevocable letter of credit because of shipping delays.

In setting up a schedule, visitors should remember that the lunch hour in Belgium tends to be long by Canadian standards; in fact, the noon meal is usually more complete than the evening one. If you want to entertain some of your Belgian contacts, invite them to lunch, not dinner. Business appointments should be made between 9 and 12 in the morning and 2 to 5.30 in the afternoon.

**Two Canadian banks are able to serve the interests of businessmen from Canada visiting Brussels.** The Royal Bank of Canada operates through the Banque Belge pour l'Industrie in which it has a minority interest and correspondence should be addressed to J. A. Munro, Royal Bank of Canada Representative, c/o Banque Belge pour l'Industrie, 12, rue du Bois Sauvage, Brussels 1. The Bank of Nova Scotia has a branch office in Brussels to serve its customers. Write to Robbert Kok, Manager, Bank of Nova Scotia, 66, Bd. de l'Imperatrice, Brussels 1.

Another point of contact for Canadian visitors is the Belgo-Canadian Chamber of Commerce, a non-profit organization under the patronage of the Canadian Ambassador and the Belgian Minister of Foreign Trade. Several Canadians in Brussels have been appointed to its Board of Directors and it is assuming an increasingly active

role in commercial relations between the two countries. Its address is Belgo-Canadian Chamber of Commerce, 13, rue Brederode, Brussels 1.

**The businessman travelling in Belgium can soon become an experienced gourmet** by dining at some of the excellent restaurants in Brussels and other areas of the country. Visitors staying in the center of Brussels may want to try out some of the following: La Maison du Cygne at 2 rue Charles Buis, one of the oldest and finest restaurants located on the Grand Place, serving excellent meals in an atmosphere of old Belgium; La Couronne at 28 Grand Place, world-famous; Casa Manuel, 34 Grand Place, a Spanish restaurant in the cellar of a 15th century house, which serves excellent tournedos; La Balance, 6 rue des Six Jeunes Hommes, the antique quarter of Brussels, where the chef's specialties and the wines from Alsace are superb, and Le Moulin de Lindekemale, 6 avenue J.F. De Becker, Woluwe St. Lambert, for those who want to venture away from the center of Brussels. This old 15th century mill, about five kilometers from the center of the city, offers excellent cuisine.

Belgian meals can last for several hours and visitors planning to attend a theatre or night club should make their dinner arrangements with that in mind. Dinner and cocktails for four will, as a rule of thumb, cost \$70 to \$75. Service charges are usually included in the bill but excellent attention can be rewarded by an extra tip.

If you are able to spend a weekend in Brussels, visit the antique market held on Saturday or Sunday morning in a square called the Grand Sablon. Under the green and red canopies one can find old pistols, ancient maps, elaborately carved dining room sets from various periods, and beautifully decorated trunks which stereo lovers employ effectively to house their speakers. Map collectors may be lucky enough to find an original Vaugondy.

Not far from the antique market, on the other side of the Gothic Cathedral, Notre-Dame du Sablon, is the Petit Sablon, a small park surrounded by small statues representing the old guilds of Brussels. In the centre are statues of the Counts of Egmont and

Hoorn, two Belgian heroes executed in the Grand Place in 1568 when they attempted to overthrow the unpopular Spanish monarch Philip II. Behind the park is Egmont Palace, where such dignitaries as Louis XV of France, Queen Christine of Sweden and Voltaire stayed during visits to the capital.

In the same quarter are dozens of antique shops which are open during the week and on Saturday. A few are open on Sunday morning too. Their prices are considered reasonable in comparison with shops in other parts of Europe, but you will still pay \$50 for a 17th century gravure of Brussels.

Not far from the antique quarter is the Flea Market, similar to the one in Paris, held on Sunday mornings. You may not buy anything but a brief stroll there will uncover some strange and amusing articles for sale. A popular place for lunch after a visit to the market is the Roi des Moules at 24 rue de la Vierge Noire, where mussels are prepared in 68 different ways for hungry market-goers.

**If you can take time just to be a tourist go to the seaside town of Ostend, to Bruges—the Venice of the North—with its canals and well-known lace products, to the Ardennes or the mountains of Belgium, on the route to Luxembourg from Brussels. Visit the well-known diamond center at Antwerp and the countryside around Ghent where there are many quaint restaurants in old country homes and stylish manors.**

Properly planned and carried through, your business visit to Belgium should provide you both with a new market and pleasant memories of an interesting country.

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## Where to Stay

**Brussels**  
Hotel Metropole  
31, Place de Brouckère  
Brussels 1  
Typical of large traditional European hotels with high ceilings and gilt-decorated walls. In the center of Brussels. One person: U.S. \$13 to \$19 plus 21 per cent.

**Macdonald Hotel**  
321-325, avenue Louise  
Brussels 5  
Excellent American-style hotel near the

Embassy. One person: U.S. \$24, including service, tax, breakfast, garage.

**Hotel Westbury**  
6, rue Cardinal Mercier  
Brussels 1  
Very modern American style. One person: U.S. \$13 to \$19 plus 21 per cent.

**Hotel Amigo**  
rue de l'Amigo  
Brussels 1  
An excellent location in the quaintest sector of Brussels but not so close to the Embassy. One person: U.S. \$12 to \$16 plus 21 per cent.

**Hilton Brussels Hotel**  
38, Bd. de Waterloo  
Brussels 1  
American style, of course, and close to the Embassy. One person: U.S. \$15 to \$18 plus 21 per cent.

**Antwerp**  
Hotel Century  
60-62, Keyserlei  
Antwerp  
One person: U.S. \$9 to \$14 plus 21 per cent.

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## International Loans Announced

**Korea will increase silk production and provide 800 new factory jobs and seasonal employment for 7,500 households with the help of a \$1.7-million investment by the International Finance Corporation (IFC) in the new Honam Silk Mill. Despite the growing use of synthetics, natural silk has been able slowly to expand its market, particularly in Western Europe.**

**Monrovia will take ships of 90,000 dwt. when dredging is completed. The World Bank has lent Liberia \$3.6 million towards the \$4.2 million project. New tugs, navigation aids and better road approaches to the port are needed too. The National Port Authority is responsible for the whole operation.**

**West Pakistan wants to increase the operating efficiency of its railways. This means track renewal, bridge strengthening, better marshalling, signalling and telecommunications, and the re-equipment of the workshops which maintain rolling stock. The World Bank is lending U.S.\$14.5 million to cover the foreign exchange cost and provide consultants' services.**

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# Agricultural Equipment

A survey made recently by the New Orleans office revealed a need in the South for varied equipment made by short-line companies in Canada. Dealers and distributors are ready to represent Canadian companies in this area.

JAMES B. WHITNELL

Commercial Officer, New Orleans

An impressive number of Canadian-made combines and parts and of tobacco harvesting units have been sold in the southern United States. Yet to our knowledge, most Canadian short-line agricultural equipment manufacturers have not gone all out in selling their equipment in the South although some European agricultural equipment manufacturers have succeeded in this area. We believe that the time is opportune for Canadian short-line manufacturers to enter this expanding market. Today there is little or no resistance to foreign-made equipment, experimentation with new crops is widespread, and mechanization of the cultivation and harvesting of traditional crops is rapidly accelerating.

Although the topography varies little from area to area, there are 16 major soil types in the South, and this results in a great variety of agricultural activity. Georgia alone has nine distinctive farming areas and Florida has four. The principal crops grown, starting with North Carolina and proceeding south and west, are tobacco, cotton, blueberries, soybeans, wheat, corn, peanuts, hay, truck crops, pecans, peaches, potatoes, melons and sweet potatoes—plus citrus fruits and sugar cane in Florida and rice, sugar cane and strawberries in Louisiana. Poultry, beef and hog raising, and dairying are increasingly important in many areas.

Long-line equipment companies usually give 23 per cent off the list price to dealers, with up to 6 per cent volume discounts. Banks are less and less involved in financing as an increasing number of long-line equipment companies are offering their own financing. They will also place equipment with the dealer free of interest and other charges for a number of months. Long-line equipment companies prefer their dealers to sell their equipment only, but in practice have to agree to their handling other non-conflicting lines.

Even competing units made by short-line manufacturers are often handled by their dealers.

**The larger short-line equipment companies, such as New Holland which usually sells direct to dealers, have their own financing and floor plans with 50 per cent carryover provisions. Most floor plans offered by short-line companies and wholesale distributors are seasonal and payment is due as soon as a unit is sold. Discounts range from 20 and 50 per cent to 25 and 5 off the list price, with up to an additional 5 per cent as a cash discount. A common complaint of dealers is that the financing plans offered by both short-line and long-line equipment companies are changed or withdrawn so frequently that at any given moment they are never sure of the actual cost of much of their equipment. Another complaint is that prices are quoted which are apparently f.o.b. Memphis, Shreveport, etc., but turn out to be f.o.b. factory without the freight costs included.**

**Wholesale equipment distributors sell short-line equipment and do their own financing, generally on the same terms as those given to them by the manufacturers. Most short-line equipment companies offer dated terms of two, three, six or nine months which the implement distributor passes on to the dealer. The manufacturer gives the distributor 40 per cent and 5 per cent off the list price and the distributor sells to the dealer at 20 per cent and 5 per cent or 25 per cent and 5 per cent off, with up to 5 per cent off as cash discount and for payment by a certain date. Many sales to Southern dealers are financed through the Commodity Credit Equipment Corporation which is located in Baltimore.**

**Because of quickness of delivery and ease of securing parts, most dealers prefer to get their equipment from an**

**implement distributor who may have 400 or more dealers as customers. Not all equipment wholesalers provide servicing. In our survey, we did not encounter any consignment distributors. There are not too many commission agents in this field; however, some even represent long-line equipment companies in those areas where all the dealers already have major accounts. These agents usually receive a 10 per cent commission.**

**The New Orleans office conducted a survey both by mail and by personal calls on a large number of implement distributors and dealers and learned that augers, bale elevators, forage trailers, front-end loaders, planters, hammer mills, harrows, hydraulic cylinders and hoists, pull-type mowers, post drivers, rock-pickers, seeder hoe drills, seed-drill fillers, soil scrapers and levellers, blowers, tarpaulins and tents, wagons, wagon boxes, waterers, grain truck bodies, feed mills, grain grinders, cattle oilers, cattle head gates, mechanical pickers, hay spriggers, drawbars, moisture testers, land packers, pumper buoys, rakes, root pickers, drawn sprayers, straw bunchers, water control gates, grain crushers and separators, grain hoppers, grain rollers and samplers were the types of equipment which would be of most interest. Specialized equipment for rice growing and harvesting, sugar cane growing and harvesting, pecan and fruit-tree shakers, high-velocity sprayers and other equipment for use in citrus groves may also have good market potential.**

**Tobacco equipment from Canada has enjoyed considerable success in North Carolina, where a good portion of the flue-cured tobacco in the South is raised. Other areas of the South where fire- and flue-cured tobacco are harvested by the stalk method versus priming for flue-cured tobacco offer fewer prospects to Canadian tobacco**

equipment manufacturers. A number of U.S. firms are copying more or less successfully Canadian tying and stitching machines. However, no one has perfected a 100 per cent mechanical harvester for flue-cured tobacco. Rice in Louisiana and in the delta country around Memphis is planted by drills and harvested by a modified combine equipped with high flotation tires. Planting and harvesting of some crops at night is becoming increasingly common, although cotton, soybeans, and some others cannot be harvested at night because of excessive dew.

Tobacco and cotton are still the primary cash crops in the South as a whole but in some areas are losing their supremacy, at least temporarily, to soybeans and in some instances to cattle raising. It is anticipated that a large amount of the acreage now devoted to soybeans will be taken out of cultivation because of over-production and the acreage used for large-scale truck farming. The increase in truck farming in not only the Mississippi Delta country but also in parts of North Carolina, Florida, Alabama, and Louisiana will necessitate better mechanical harvesting equipment. Although there will still be a certain number of relatively small-sized farms in certain areas of the South, the trend is to larger and fewer farming units which will need more and larger agricultural equipment.

In citrus and other fruit-raising areas, experiments in using mechanized equipment are going forward and the U.S. Department of Commerce, with the various state agricultural departments, is developing strains of fruits and vegetables which lend themselves more readily to mechanical harvesting. The state agricultural departments and the county agents have usually shown themselves willing to work with any equipment manufacturer regardless of nationality, and we would urge Canadian manufacturers to keep this in mind when first attempting to penetrate a new market in the South.

**There is a definite market for Canadian short-line agricultural equipment, and we believe that now is the time for Canadians to initiate their efforts to capture a share of this market. It is essential to be flexible about financing, floor plans, promotional support and arrangements with dealers having competitive lines. Promotional support by placing newspaper and trade journal advertisements and participation in state fairs with the dealer are a necessity for a company attempting to gain a foothold in the market. We believe that the implement distributors in many cases are the best channels of distribution for short-line equipment manufacturers, although a number of dealers can do an equally good job in certain areas. The best way to survey the market is to bring equipment down and de-**

monstrate it before implement distributors, dealers, county agents, farm associations and others.

**Potential exporters should contact the United States Division, Office of Area Relations, Department of Industry, Trade and Commerce to establish whether or not the particular machines or parts that they intend to export to the United States are entitled to free entry or are dutiable. To assist the Department in providing you with this information, send full details about your product. For machines or parts that are subject to duty on entry into the United States, the exporter should be prepared to offer on both an f.o.b. plant and a delivered duty-paid basis, so that the U.S. customer has an option of purchasing on either basis. Provided it can be demonstrated satisfactorily to U.S. Customs officials that both prices were freely offered, freight, clearing charges, etc., will not be regarded as part of the dutiable value.**

For our part, we would be pleased to suggest names of potential dealers and distributors in given areas of the South and to contact county agents, agricultural schools, etc., for the purpose of setting up field demonstrations and tests of equipment. We look forward to working with any Canadian company that is prepared to try and gain a foothold in this market.

## Hospital Supplies

In the Israeli market you need first a good representative who can service the equipment you sell. New hospitals, and expansion of older ones, are being planned now.

D. L. GOLDING  
*Commercial Officer, Tel Aviv*

Israel has included the provision of medical services in its social framework. These services are provided through five channels: the Government, medical and sick funds, municipalities, private sources, and Hadassah.

The Government runs fifteen hospitals with 5,200 beds; its future plans include the construction of one new hospital and expansion of existing

ones. By 1970 there should be 7,500 beds. Of the many sick funds in Israel, only one owns and maintains its own hospitals—that is the Israeli Workers' Sick Fund, which is managed by the Labor Federation. The fund has eight general hospitals with 2,500 beds and it is also considering building a new hospital and expanding those it has. The major cities have their own hospitals which they staff and administer.

The private general hospitals have altogether 500 beds. Hadassah, the Women's Zionist Organization of North America, runs a hospital in Ein Kerem, Jerusalem.

The Ministry of Health purchases all the medical equipment for the Government and municipal hospitals, and maintains a central warehouse. Requests for equipment are received

from heads of departments at each hospital, and countersigned by the director. The Ministry's chief buyer negotiates only price and delivery terms with the manufacturer or his representative. In most instances, purchases of equipment are directed to manufacturers who have agents and service facilities in Israel. The Sick Fund follows a similar procedure.

The table gives a general idea of the type of equipment imported, but all new and sophisticated equipment may have a sales potential here.

The first step to take if you are interested in entering the Israeli market is to appoint a suitable representative—one with facilities to service the equipment you offer. Officers of the Commercial Division, Canadian Embassy, Tel Aviv, will gladly help you find a good agent. In addition, they will examine the sales possibili-

#### ISRAELI IMPORTS OF HOSPITAL AND CLINIC APPARATUS AND SUPPLIES

Product	(Cdn. \$'000) 1968	Product	(Cdn. \$'000) 1968
Laboratory, hygienic and pharmaceutical glassware	449	Breathing appliances, other	206
Electro-surgical apparatus for electro-cutting or electro-coagulation	14	Artificial limbs and other artificial parts of the body	104
Heart and lung surgery apparatus	30	Hearing aids	70
Electro-medical apparatus, other	84	X-ray apparatus for medical diagnosis, other	276
Artificial kidney apparatus, parts, accessories thereof	86	X-ray apparatus of angiocardiograph type	10
Syringes with or without needles (1,000 units)	120	Medical apparatus using radioactive substances	47
Medical, dental, surgical and veterinary instruments and appliances, other	1,677	X-ray tubes and generators, including high-tension generators	122
Psychological aptitude-testing apparatus	18	X-ray screens and X-ray control panels and desks	28
Oxygen therapy and artificial respiration apparatus, including iron lungs	79	Parts and other accessories for X-ray and other radiation apparatus, n.e.s.	52

ties for your product if you send them technical sales literature, f.o.b. Canadian port prices, and an indication of your policy covering the appointment

of agents/distributors. In planning your next sales trip to Europe, plan to visit Israel also and look into market opportunities for yourself.

## Giftware

Success of Canadian firms at the Boston Gift Show in the last few years points up the opportunities for you in the big New England gift and souvenir market.

HERBERT B. STEARNS  
*Commercial Officer, Boston*

New England, with its great cities, historic sites and mountain and seaside resorts, is a natural market for gift products and souvenirs. Places like New Bedford and Nantucket have become famous for scrimshaw jewellery, gifts made from driftwood, sea pictures and other articles with a nautical flavor. Gift items of this type are sold in quantity to tourists on Cape Cod, throughout Massachusetts, and in towns and villages along the Maine coast.

There are hundreds of gift shops in the summer and ski resorts of Vermont, the White Mountains region of New Hampshire, and along the Mohawk Trail that winds through the Berkshire Mountains of Western Massachusetts. Tourists eagerly buy all sorts of souvenir and precious-stone jewellery, book ends, pictures, handicraft items, Indian slippers,

moccasins, sweaters, scarves, handwoven goods, and food delicacies such as jams, jellies, relishes, candies and maple sugar confections. Stores in the lake resort areas such as Lake Winnepesaukee in New Hampshire and Sebago, Rangeley and Moosehead Lakes in Maine carry the more traditional kinds of gifts—artistic glass, pottery, ceramic products, objets d'art, paintings, jewellery and clothing.

There are fifty traditional department stores in the New England states, and numerous junior department stores, discount houses and discount chains (some with as many as 150 branches), drug stores, tobacco jobbing firms with retail outlets, hardware-housewares stores with gift departments, jewellery stores and chains, and neighborhood variety stores. All of them are potential customers for gift products of one kind or another.

Many of these outlets send representatives to the Boston Gift Show to which the public is not admitted. It is held twice yearly and almost 90 per cent of the buyers there (about 6,000 altogether) are from New England. In the past, it was held at the Statler Hilton Hotel in Boston but there are plans to move it to the War Memorial Auditorium in March 1970.

About fifteen Canadian gift producers have participated in the Boston Gift Show in each of the last three years, exhibiting pottery, ceramic items, giftware made of lucite, artistic glass, souvenir jewellery, decorative aluminum pieces, wood carvings, Eskimo art and sculptures, prints, sea pictures, sealskin boots and other footwear, and handwoven articles of clothing. All of the exhibitors made substantial sales each time and many were able to build up a continuing

market in New England using a manufacturer's representative.

The last time Canadians exhibited, no less than 32 buyers placed orders for Eskimo carvings—which confirms that the New England trade wants our unique and specialty gift lines as well as the traditional lines. Indeed, independent retailers find specialty products and gifts of unique design very profitable because there is a great deal of duplication in the traditional and brand-name fields and customers are attracted by something different.

One of the best ways for a Canadian company to get distribution for giftware in the New England market is to use a manufacturer's representative. These people are familiar with the territory and the sales opportunities and over a period of years have gained the confidence of the trade. The Canadian manufacturer should offer a fixed percentage on sales as commission, based on the wholesale value of the business written by the representative. For gift products of traditional design, the commission is usually about 15 per cent. For some gift products, however, it may be 10 or 12 per cent. Commission is generally paid to the representative monthly.

There are three main types of manufacturer's representative. One sells only to better-class stores (the trade calls this the "nifty gifty" business). Another specializes in mass merchan-

disers such as discount stores, drug chains, etc., but may also cover gift departments in department stores; this type of representative handles ceramic and pottery articles, artistic glass and traditional products. The third concentrates on stores which sell souvenirs and jewellery mainly to tourists.

If you produce gift products and would like to examine the New England market in more detail, get in touch with the Canadian Consulate General, 500 Boylston Street, Boston, Massachusetts 02116. The Trade Commissioners will assist you by suggesting suitable representatives or potential buying outlets. If you plan to visit the Boston office, they will outline a possible marketing approach and will arrange appointments with persons in the New England giftware trade.

### Canadians at the Boston Gift Show March 1969

Bastien Bros. Inc.  
Huron Village, Quebec  
Slippers and leather goods

Blue Mountain Pottery  
Collingwood, Ontario  
Ceramics

Breadner Company Limited  
Hull, Quebec  
Souvenir jewellery

Canadian Arctic Producers Limited  
Ottawa, Ontario  
Eskimo handicrafts

Canuck Pottery (Quebec) Ltd.  
Labelle, Quebec  
Pottery

Chalet Artistic Glass Ltd.  
Montreal, Quebec  
Artistic glassware

Edag Crystal Co. Ltd.  
Montreal, Quebec  
Artistic glassware

La Federation des Cooperatives  
du Nouveau, Quebec  
Levis, Quebec  
Eskimo handicrafts

Madawaska Weavers Limited  
St. Leonard, New Brunswick  
Handwoven goods

Meadowcraft Pottery  
Streetsville, Ontario  
Pottery

MacAskill Pictures Limited  
Halifax, Nova Scotia  
Marine pictures

Middleton Wood Sculptures  
Brantford, Ontario  
Wood carvings

Unique Art Inc.  
St. Martin, Beauce, Quebec  
Gifts with acrylic embeddings

Upton River Mills Ltd.  
Montreal, Quebec  
Handwoven place mats

Royal Canadian Art Pottery  
Hamilton, Ontario  
Pottery

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## World Bank Increases Lending

Development financing by the World Bank and the International Development Association (IDA) rose by 87 per cent in the fiscal year ended June 30, 1969. Loans and credits reached U.S.\$1,784 million compared with U.S.\$953.5 million the previous year. Over and above this, the International Finance Corporation provided U.S.\$93 million of financing compared with U.S.\$51 million in 1968. The World Bank borrowed U.S. \$1,224 million

on world capital markets at an average of 6.46 per cent interest. The amount was 55 per cent more than in 1967/68 and the Bank's cash position was U.S.\$420 million better at the year-end.

Loans for education trebled and loans for agriculture almost doubled—agricultural development, in fact, received U.S. \$342 million in the year. The International Finance Corporation's U.S.\$93 million

got U.S.\$500 million worth of projects under way in the private sector in 16 countries. Not only did the volume of financing increase but its geographical distribution shifted. Member countries in Africa received almost 150 per cent more. Four IDA credits amounting to U.S.\$51 million were granted to Indonesia, which had not obtained loans previously from the World Bank group

# Chemicals

The South African chemical industry has developed rapidly in recent years but the rising standard of living continues to push up demand, especially for plastics, drugs, crop protection products and potash. Canada is already selling chemicals to South Africa.

M. A. BRAULT

Assistant Trade Commissioner, Johannesburg

The South African chemical industry has always been closely associated with mining and the country today has the world's largest dynamite plant. Many other chemicals have been added to the industry's range since World War II. Sulphuric acid plants using pyrites sprang up to meet the demand for uranium recovery at the gold mines. The government-sponsored SASOL oil-from-coal complex now produces a variety of petrochemicals and fertilizers. Caustic soda and chlorine are made for the expanding pulp and paper industries. Fine chemicals of many kinds are manufactured too and if specialties such as paint, detergents, tanning extracts and soaps are included, the chemical industry has a total output of well over Cdn.\$700 million a year. This article outlines some of its main branches.

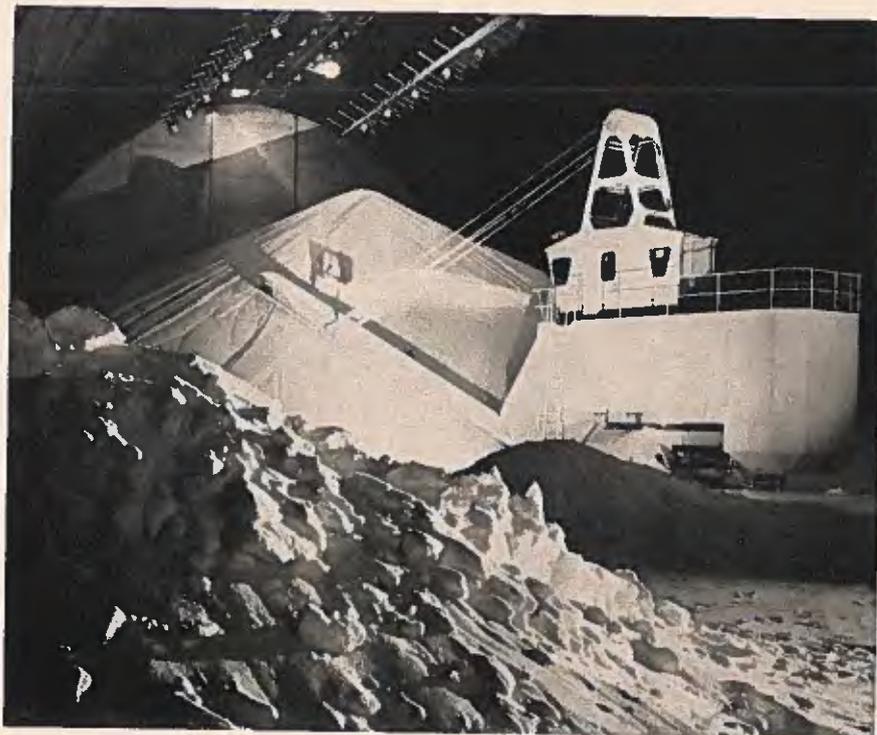
The pharmaceutical industry is not only the fastest-growing sector, it is also the largest, with estimated sales of Cdn.\$150 million in 1968. Before

World War II most drugs were imported ready for use and there were only a few manufacturing laboratories. Today there are over 100 pharmaceutical plants, involving investments of Cdn.\$75 million and employing up to 10,000 people. South Africa is now self-sufficient in the important tetracycline group of antibiotics, vaccines, anaesthetics, enzymes, chloramphenicol antibiotics, salicylic acid, and related products. Some other pharmaceuticals are also being made from local raw materials. However, it is still more like an assembly than a manufacturing industry because much of the work involves only the final processes of drug production: formulation, compounding and packaging. The industry depends heavily on foreign suppliers for the active ingredients because of the high cost of developing its own facilities to make sophisticated organic chemicals.

Sales were running at about Cdn.\$150 million in 1968 and imports of drugs

in bulk at about Cdn.\$30 million. There should be some good opportunities for Canadian suppliers of bulk pharmaceutical materials.

**Sales of explosives in 1967 topped Cdn.\$62.5 million. Only Cdn.\$725,000 worth were imported** (fireworks and specialized pyrotechnic products accounted for almost half of these imports). Explosives were the first chemical products to be made in South Africa. The largest dynamite factory in the world is at Modderfontein and is owned by African Explosives & Chemical Industries. Nitroglycerine once accounted for 80 per cent of the explosives used in South Africa, but ammonium nitrate is cheaper and nitroglycerine's share has now fallen to 15 per cent. The future market for explosives depends largely on the gold-mining industry which is expected to decline but exports and increasing sales to coal mines and base metal mines may help to offset this trend.



**Agricultural chemical sales in 1967 reached Cdn.\$120 million with fertilizers accounting for 85 per cent.** At present 80 per cent of the fertilizers produced are bought by only 20 per cent of the farmers. Annual consumption of 255,000 tons of nitrogen will not catch up with theoretical South African capacity until 1974. The main producers are African Explosives and Chemical Industries at Umbogintwini, Fisons at Milnerton, and SASOL. SASOL now produces 70,000 tons a year of nitrogen and if it builds its planned 160,000-ton plant, domestic nitrogen requirements should be covered until 1980. Phosphates

*The No. 2 plant at the Modderfontein dynamite factory is being extended to produce 110,000 tons of urea a year both for use in agriculture and to make urea-formaldehyde resin.*

were imported until 1961 when FOSKOR began upgrading phosphates from the low-grade deposits at Phalaborwa in Northern Transvaal. The South African demand of one million tons can now easily be met locally.

A most interesting development is the exploration of vast offshore phosphate deposits at Agulhas Bank in Cape Province which is being undertaken by FOSKOR. All the country's potash is imported and cost South Africa Cdn.\$6.25 million in 1967. The consumption of nitrogen is growing by 19 per cent a year, of phosphates by 7 per cent, and of potash by 15.

Insecticide, fungicide, pesticide and herbicide sales amount to some Cdn. \$16 million and involve over 130 different products. Most of the active ingredients are imported and formulated locally to strict specifications. They must be tested for two years and receive the Department of Agriculture's approval before they can be marketed. Local content is about 50 per cent of retail value.

**South Africa produces 26,000 tons of synthetic rubber a year, worth Cdn. \$15 million.** Imports of synthetic rubber (mainly butyl rubber from Esso) amount to 9,000 tons, worth Cdn. \$6.2 million. About 30,000 tons a year of natural rubber are imported.

Synthetic Rubber Co., the only local producer, sells approximately 75 per cent of its styrene-butadiene (SBR) output to tire manufacturers. Nevertheless, natural rubber still accounts for approximately half the rubber consumed. Synthetic Rubber Co. is considering a Cdn.\$22.5 million plant which would eventually produce 40,000 tons a year of polyisoprene which would compete with natural rubber. A 2,000-ton plant to manufacture acrylonitrile butadiene is also being considered.

The country lacks producing oilfields. To fill this gap in strategic fuel supplies, the Government invested Cdn. \$150 million in SASOL which it set up to produce oil from the abundant cheap coal. A secondary objective was to lay the foundation for a diversified chemical industry; an additional Cdn. \$112.5 million was therefore invested in petrochemical plants. In 1967 SASOL's total sales reached Cdn. \$67.5 million; petrochemicals account-

## CANADA'S CHEMICAL EXPORTS TO SOUTH AFRICA

Commodity	Cdn.\$		Commodity	Cdn.\$	
	1967	1968		1967	1968
Selenium	19,638	28,210	Glue, animal	1,620	—
Chemical elements n.e.s.	216,869	195,974	Adhesives n.e.s.	9,308	18,174
Iron oxides, natural or synthetic	270	—	Polyethylene resins, not shaped	724,794	306,703
Inorganic bases & metallic oxides n.e.s.	44,633	48,277	Polystyrene resins, not shaped	1,364	10,811
Metallic salts or inorganic acids n.e.s.	174,825	376,689	Plastic and synthetic rubber, not shaped	470,018	199,347
Radioactive elements and isotopes	18,244	113,870	Plastic film and sheet	676,768	719,323
Inorganic chemicals n.e.s.	18,331	8,939	Laminated plastics materials	—	7,063
Phenols, phenol-alcohols & derivatives	212	134,465	Plastics basic shapes and forms n.e.s.	30,199	40,025
Hydrocarbons and their derivatives	5,630	966	Ready-mixed paints, including white lead	21,755	6,685
Alcohols and their derivatives	22,000	73,011	Varnishes and prepared shellacs	5,816	1,067
Organic acids, anhydrides & derivatives	18,486	70,781	Stains, lacquers & related products n.e.s.	560	6,793
Nitrogen-function compounds n.e.s.	8,460	819	Insecticides and rodenticides	—	41,421
Organo-inorganic compounds	170,145	18,280	Dyestuffs, pigments, lakes and toners	15,400	11,411
Organic chemicals n.e.s.	15,907	45,623	Industrial chemical specialties & explosives	88,797	195,359
Potassium chloride, muriate	433,610	245,650	Lubricating oils and greases	3,200	544
Fertilizers & fertilizer materials n.e.s.	1,030	1,898	Petroleum and coal products n.e.s.	2,771	2,711

ed for Cdn. \$27.9 million and were the more profitable side of the business. SASOL's major chemical products are ethylene, butadiene and styrene, nitrogenous fertilizers, heavy hydrocarbons and ketones. When SASOL was short of ethylene it started cracking imported naphtha and in 1967 cracked 38,000 tons. With a new cracker on stream, capacity should rise to 138,000 tons of ethylene a year.

**Plastics have made amazing strides and sales of all types total 120,000 tons a year valued at close to Cdn.\$150 million.** The industry's capital investment is Cdn.\$225 million compared with less than Cdn.\$15 million in 1953. Nevertheless, two-thirds of South Africa's requirements are still imported in polymer, semiprocessed or processed form. Per capita consumption of plastics is a little over 12 pounds a year compared with 70 pounds a year in the U.S. Forecasts indicate that the South African plastics industry will grow at the rate of 20 per cent a year compared with the 16 per cent predicted world growth.

This article gives but a brief outline of the chemical industry in South Africa. There is a potential for most chemicals here and the Trade Commissioners receive many inquiries from South African firms which want to find a Canadian source of supply. Now is the time to start thinking about your entry into the South African market. Write to the Canadian Government Trade Commissioner, P.O. Box 715, Mobil House (17th floor), Corner Rissik and De Villiers Streets, Johannesburg. Send him your catalogue and give him an idea of your prices. He would be only too pleased to assist you in introducing your product to South African buyers.

# Curacao Recovers

Disturbances at the end of May have not resulted in a lasting disruption of trade. Canadian suppliers welcomed if they offer competitive prices; shipping services good.

DAVID G. NELSON

Assistant Commercial Secretary, Caracas

The doors of Curacao and the Netherlands Antilles remain open to Canadian trade, despite the riots that took place there at the end of May. Businessmen are already preparing for the October tourist season. The Shell refinery, one of the largest in the world, is operating smoothly, and the local Chamber of Commerce predicts that everything will be normal by September, despite the destruction of 48 stores and damage running into \$15 million. The hotels were not touched during the disturbances and winter reservations have not been cancelled. This means that the two major sectors of the economy, oil refining and the tourist industry, have not been affected.

In the past year and a half, Canadian exports to the Netherlands Antilles have declined, especially sales of explosives and flour. Other commodities have made gains, however, particularly sugar, pharmaceuticals, washing machines, pipes and tubes, and writing paper.

Some of the causes of this decline are within the control of the Canadian exporter. There are, in fact, many reasons why this should continue to be a good market for Canada. The islands have few manufacturing plants and none turning out consumer goods so that nearly everything has to be imported. Wages are rising—in fact, they are the highest in the Caribbean—so this means an expanding market and one that the larger exporting countries are apt to neglect. As for competition from the U.S., the recent dock strike there encouraged importers to diversify their sources of supply. Tariffs continue to be the lowest in the Caribbean area, generally 4½ per cent on most items. Communications present no problems; ships from Canada and the United States call regularly at Curacao and Aruba, and there are frequent jet flights between New York and the Netherlands Antilles. It is a market that will accept

packaging in all languages—English, Dutch, German, Spanish, French, and the native Papiamento. The media—radio, television, and the daily press—are sophisticated, the rates for advertising are reasonable, and conditions are good for the development of sales of Canadian branded products.

**The time is now ripe for other Canadian suppliers to break into the island market.** Gradually more and more importers are looking to other suppliers besides those in the United States and Europe. Canada is a favored source because businessmen in the islands believe that Canadian manufacturers really care about smaller markets, unlike some of the companies in larger countries. They believe that Canadians will support their agents by delivering a quality product, at the right price, on time, and that they will follow up with advertising in local media and regular visits by company representatives.

**Almost any item will sell. Competition is stiff, but at least every country competes on an equal basis.** Despite being part of the European Common Market, the Netherlands Antilles extends only a token tariff preference to member countries. Quite naturally there has been an emotional tie with Holland as well as considerable financial support from that country and the EEC. But as the islands have acquired a stronger national identity, they have begun looking more and more to other markets for their capital goods. As an example, one local company has just purchased a hydrogen manufacturing plant from Canada. Two other Canadian companies are in the middle of a sales drive to sell fire-fighting equipment and a desalination plant. Both offers have been well received.

Canadian sales to the Netherlands Antilles totalled Cdn.\$3 million in 1966, \$3.68 million in 1967, and \$3.08

TABLE 1

WHAT CANADA SELLS THE NETHERLANDS ANTILLES

	Cdn.\$'000	
	1967	1968
Sugar	595.1	703.8
Flour	344.9	242.1
Pharmaceuticals	124.7	162.8
Salmon	144.4	161.4
Explosives	321.2	152.7
Washing machines	81.0	112.0
Toilet paper	96.8	111.9
Tires and tubes	122.8	83.2
Copper and alloy pipe and tube	42.9	79.4
Sardines	68.9	79.3
Milk powder	74.0	70.8
Newsprint	54.9	70.6
Peanut butter	67.5	67.5
Writing and fine paper	34.4	60.4
Whisky	40.0	51.5
<b>Total, above</b>	<b>2,213.5</b>	<b>2,209.4</b>
<b>Others</b>	<b>1,469.8</b>	<b>869.6</b>
<b>Total exports, including all others</b>	<b>3,683.3</b>	<b>3,079.0</b>

million in 1968. In the first quarter of 1969 they reached \$507,769, compared with \$624,838 in the same period of 1968. Last year our exports of commodities like malt, lumber, card punch and tabulating machines and computers, brooms and brushes, batteries, wire and cable, and electricity measuring instruments declined. Those that made gains were listed earlier.

**Why not sell to these islands—or at least investigate the prospects.** The weather is hot, the waters are balmy, the beaches pleasant, and the sun always shines. The businessmen are friendly, efficient and receptive. Include Curacao and Aruba on your next visit to the Caribbean.

# Foreign Tariffs and Trade Regulations

**Libya has decreed that all foreign commercial agents operating there must liquidate their businesses by August 31 this year.** The Commercial Agencies Department of the Ministry of Economy and Trade has given this order which covers all agencies which are not owned 100 per cent by Libyan nationals.

Foreign commercial agents were to inform the authorities by August 15 of the steps they have taken to liquidate their agencies. A new law issued early this year stipulates that only Libyan agents can deal with producing companies abroad.

The department says that the Government will not recognize any transfer of representation from foreign to Libyan agents because such a transfer is against the law. This means that completely new agents will have to be appointed by manufacturing companies.

**The Government of Japan has given notice of the liberalization of the following items, as from April 1, 1969.** These liberalizations modify the list of residual import restrictions previously issued in L/2981/Add.10.

Tariff Item No.	Description
ex. 16.02-2	Guts, bladders and stomachs of bovine animals or of pigs, simply boiled in water
ex. 22.09-1(1)-b	Bourbon whisky (of an alcoholic strength of less than 50 degrees, irrespective of the capacity of containers; in containers of a capacity less than 2 litres, irrespective of alcoholic strength)
ex. 23.07-2	Compound feeds of more than Yen 70 per kilogram c.i.f. value (put up for sale by retail, in containers of a capacity not more than 35 kilograms in net weight) (excluding those containing not less than 10 per cent by weight of lactose or not less than 25 per cent by weight of crude protein); and residues falling within heading No. 2303 of the customs tariff schedules (excluding residues of starch manufacture), pelletized by the addition of molasses (not more than 25 per cent by weight of added molasses)
ex. 37.02-1-(1)	Cinematographic color film not less than 35 mm. in width
70.06	Cast, rolled, drawn or blown glass (including flashed or wired glass) in rectangles, surface-ground or polished, but not further worked
ex. 84.06-1-(1)-(3)	Outboard motors, with a rating of not less than 10 hp. but less than 20 hp.

## Port of Hull Modernizes

Hull is Britain's third most important port in terms of value of goods handled. It is on the east coast of England 22 miles inland from the North Sea on the Humber River and about midway between London and Edinburgh. With continuing development the port today has 12 miles of wharves in 11 docks that stretch for seven miles along the Humber.

Facilities include 150 dock cranes, most of three- to six-ton capacity but with a maximum lift of 100 tons. There are two floating cranes (one of 60 tons and one of 80), a 60,000-ton grain elevator, and four floating pneumatic elevators with capacities of up to 300 tons an hour. The British Transport Docks Board is responsible for the Hull Docks and has a program to improve existing facilities and to add new ones as required.

The latest figures available for traffic through the Port of Hull are for the year

1966. Imports accounted for 6.1 million tons and exports for 3.3 million. Canadian products entering Britain at Hull included grains, oilseeds, timber, meal and ores and totalled 375,191 tons, some 6.3 per cent of the total. Most of these were transported in charter vessels.

The main distribution area from Hull is the North of England and the Midlands. This includes major cities such as Birmingham, Manchester, Sheffield, Leicester, Leeds and Hull itself. In overseas markets the North Sea ports and Scandinavia are the most important to Hull and account for some 20 per cent of incoming and 73 per cent of outgoing cargo. The need for rapid and efficient handling of cargo on these short sea routes has led to extensive container, palletization and other unit load developments at the port.

North European ports are receiving an increasing number of large single overseas

shipments for warehousing and redistribution to European and British importers. Canadian exporters who use this method of distribution for goods destined to the Midlands and the North of England will be interested in the special facilities at the Port of Hull. Beginning in 1965 special docks were built to handle roll-on/roll-off and stern-loading vessels and also to provide parking and storage areas and other facilities required for handling palletized cargo, containers, trucks and semi-trailers. The King George Dock has a 40-ton container transporter crane and a 28-acre container marshalling area with a berth that can handle ships up to 25,000 tons. Sailings between Hull and Rotterdam, Gothenburg, Hamburg, Bremen, Amsterdam and Antwerp range from once a day to three times a week. This ensures quick delivery and, in many cases, through delivery of goods to British importers.

# Trade Commissioners on Tour

## In Canada

If you wish to meet the officers whose itineraries are listed below, get in touch with—

In Ottawa—  
Department of Industry, Trade and Commerce

In St. John's, Halifax, Montreal, Winnipeg, Regina, Calgary, Edmonton, Vancouver—  
Regional Office, Department of Industry, Trade and Commerce

In Toronto—  
Canadian Manufacturers Association

In Windsor, Ontario—  
Greater Windsor Industrial Commission

In Fredericton, New Brunswick—  
Department of Industry

In all other centers—  
Board of Trade or Chamber of Commerce

## Australia

Leon B. Stryker, Commercial Officer in Melbourne:

Montreal: September 24-29

Toronto and Ontario: October 1-8

Winnipeg: October 9-13

Regina: October 14

Edmonton: October 15-16

Calgary: October 17

Vancouver: October 20-24

## Peru

Dr. L. G. Poma, Commercial Officer in Lima:

Montreal: September 2-10

Toronto: September 11-23

Winnipeg: September 25-26

Calgary: September 29-30

Vancouver: October 2-3

## Spain

H. E. Lemieux, to be Commercial Counsellor in Madrid:

Montreal: September 4-10

## Trinidad

K. G. Ramsay, Commercial Counsellor in Port-of-Spain:

Toronto and Ontario: September 9-17

Montreal: September 18-28

Maritimes: September 30-October 3

## United Arab Republic

M. Karkegi, Commercial Officer in Cairo:

Montreal: September 19-28

Toronto and Ontario: September 29-October 7

Winnipeg: October 9-10

Vancouver: October 14-17

## Temporary Duty in Ottawa

Trade Commissioners on temporary duty in Ottawa may be contacted through the Trade Commissioner Service, phone 995-8022 (area code 613).

**S. V. Allen**  
Consul General  
Chicago  
September 8-12

**G. E. Blackstock**  
Commercial Secretary  
Berne, Switzerland  
August 25-September 5

**J. R. Brocklebank**  
Acting Commercial Secretary  
Lagos, Nigeria  
September 15-19

**L. A. Campeau**  
Commercial Counsellor  
Madrid, Spain  
September 8-19

**R. H. Gayner**  
Commercial Counsellor  
Wellington, New Zealand  
September 2-5

**D. M. Holton**  
Commercial Counsellor  
Dublin, Ireland  
September 2-5

**A. D. Howell-Jones**  
Commercial Officer  
London, England  
September 9-11

**M. Karkegi**  
Commercial Officer  
Cairo, U.A.R.  
September 8-19

**H. E. Lemieux**  
to be Commercial Counsellor  
Madrid, Spain  
August 27-September 3

**E. H. Maguire**  
Consul  
Detroit  
September 2-6

**K. G. Ramsay**  
Commercial Counsellor  
Port-of-Spain, Trinidad  
September 5

**R. D. Sirrs**  
Consul and Senior Trade Commissioner  
Chicago  
September 2-5

**Leon B. Stryker**  
Commercial Officer  
Melbourne, Australia  
September 15-22

**S. G. Tregaskes**  
Commercial Counsellor  
Guatemala  
September 9-10

## In Territory

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

### Bulgaria, Hungary, Romania

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

### Barbados, Windward Islands

D. J. McJanet, Assistant Commercial Secretary in Port-of-Spain, Trinidad, will visit Barbados, St. Lucia, St. Vincent and Grenada September 20-27.

### Burma

D. P. Lindores, Assistant Commercial Secretary in Kuala Lumpur, Malaysia, will visit Burma September 1-12.

### Cyprus

An officer from the Tel Aviv, Israel, office will visit Cyprus every month for at least three days, usually in the second half of the month.

### Guyana

J. M. C. Lavoie, Assistant Commercial Secretary in Port-of-Spain, Trinidad, will visit Guyana September 16-18.

### Pakistan

H. W. Guy, Assistant Commercial Secretary in Islamabad, Pakistan, will visit East Pakistan September 15-19 and Karachi September 29-October 4.

### Trinidad

J. A. Ahow, Commercial Officer in Port-of-Spain, will visit South Trinidad September 9, and North Trinidad October 1.

# Foreign Exchange Rates

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

Relations, Department of Industry, Trade and Commerce, Ottawa.

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

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

For conversion of column one to the U.S. dollar equivalent, *multiply* by .92.

To convert column two, *divide* by .92.

Country and Currency	Value of		Country and Currency	Value of	
	foreign currency unit in Canadian dollars at August 13	Canadian dollar in foreign currency units		foreign currency unit in Canadian dollars at August 13	Canadian dollar in foreign currency units
Algeria Dinar	.1946	5.13	Denmark Krone	.1434	6.98
Argentina Peso (free)	.0031	322.58	Dominican Republic Peso	1.079	.93
Australia Dollar	1.200	.8340	Ecuador Sucre (official) (free)	.0599 .0536	16.72 18.65
Austria Schilling	.0417	24.03	El Salvador Colon	.4316	2.32
Bahamas Dollar	1.058	.94	Fiji Pound	1.238	.80
Belgium and Luxembourg Franc	.0214	46.72	Finland Markka	.2569	3.90
Bermuda Pound	2.567	.38	France, Monaco, etc. <sup>2</sup> Franc	.1946	5.13
Bolivia Peso	.0906	11.06	Franco-African Republics <sup>3</sup> Franc	.0039	256.4
Brazil Cruzeiro (official free)	.2640	3.77	French Pacific <sup>4</sup> Franc	.0107	93.4
Britain Pound	2.572	.39	Germany D Mark	.2715	3.72
British Honduras Dollar	.6430	1.55	Ghana New Cedi	1.058	.94
Burma Kyat	.2266	4.42	Greece Drachma	.0359	27.93
Ceylon Rupee	.1813	5.53	Guatemala Quetzal	1.079	.93
Chile Escudo (bank rate) (free)	.1167 .1044	8.57 9.54	Guyana Dollar	.5395	1.85
China, Republic of New Taiwan Dollar (official)	.027	37.04	Haiti Gourde	.2158	4.64
Colombia Peso (fixed)	.062	15.87	Honduras Lempira	.5395	1.85
Congo (Kinshasa) Zaire	2.154	.4651	Hong Kong Dollar	.1780	5.62
Costa Rica Colon	.1629	6.15	Hungary Forint (official)	.0921	10.85
Cuba <sup>1</sup> Peso	.....	.....	Iceland Krona (official)	.0123	81.96
Czechoslovakia Koruna	.1499	6.68	India Rupee	.1430	7.00
			Indonesia <sup>5</sup> Rupiah	.....	.....

Country and Currency	Value of		Country and Currency	Value of	
	foreign currency unit in Canadian dollars at August 13	Canadian dollar in foreign currency units		foreign currency unit in Canadian dollars at August 13	Canadian dollar in foreign currency units
Iran Rial	.0142	70.42	Peru Sol (free)	.0248	40.65
Iraq Dinar	3.021	.33	Philippines Peso (free)	.2756	3.63
Ireland Pound	2.572	.38	Poland Zloty (fixed basic rate)	.2700	3.71
Israel Pound	.3083	3.25	Portugal & Colonies <sup>6</sup> Escudo	.0375	26.66
Italy Lira	.0017	588.23	Saudi Arabia Riyal	.2066	4.84
Jamaica Pound	2.572	.38	Sierra Leone Leone	1.502	.66
Japan Yen	.0030	333.33	Singapore Dollar	.3525	2.85
Kenya Shilling	.1526	6.55	South Africa Rand	1.502	.66
Lebanon Pound (free)	.3345	2.99	Spain & Dependencies Peseta	.0155	64.93
Malaysia Dollar	.3525	2.85	Sweden Krona	.2086	4.79
Mexico Peso	.0863	11.60	Switzerland Franc	.2507	4.01
Morocco Dirham	.2166	4.69	Syria Pound (free)	.2819	3.55
Netherlands Florin	.2988	3.36	Thailand Baht (free)	.0523	19.15
Netherlands Antilles Florin	.5722	1.75	Trinidad & Tobago <sup>7</sup> Dollar	.5392	1.85
New Zealand Dollar	1.204	.82	Tunisia Dinar	2.055	.48
Nicaragua Cordoba	.1542	6.50	Turkey Lira	.1199	8.35
Nigeria Pound	3.017	.33	United Arab Republic Pound (official)	2.482	.40
Norway Krone	.1512	6.63	United States Dollar	1.079	.92
Pakistan Rupee	.2266	4.42	Uruguay Peso (free)	.0043	232.56
Panama Balboa	1.079	.92	Venezuela Bolivar (official free)	.2405	4.17
Paraguay Guarani (free)	.0086	116.28	Yugoslavia Dinar (official)	.0863	11.61

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

2. Franc is also used in French Guiana, Guadeloupe and Martinique.

3. Chad, Central African Republic, Congo (Brazzaville), Dahomey, Gabon, Ivory Coast, Islamic Republic of Mauritania, Niger, Senegal, Upper Volta, Camerouns, Togoland, and Malagasy. Also Reunion, Comoro Islands, St. Pierre and Miquelon.

4. New Caledonia, New Hebrides, French Polynesia.

5. Because of the complexity of the Indonesian exchange rate system, it is impractical to quote a single representative rate for the rupiah.

6. Approximately same rate for Portuguese territories in Africa.

7. Also used in Barbados, Leeward and Windward Islands.

# Documentation

The world's biggest paperchase—that's how a businessman describes the present system of export documentation. Its cost and complexity have seriously impeded world trade.

J. D. MOORE

Secretary, Canadian Export Association

It has been estimated that the cost of paperwork for an export shipment from the U.S. runs at between 5 and 10 per cent of its value. No less than 810 different forms are in use and filling one order can involve up to 43 of them. The situation in Canada is very similar. Documentation and the way the various pieces of paper are passed around are a carryover from the days of clerks on high stools and sailing ships. To some extent the airlines have been able to break with tradition and they have gained substantial business as a result. But an integrated, computerized system of handling international trade is still a long way off.

It will come eventually. In Europe trade documents have already been considerably simplified. The Economic Council for Europe (ECE), a UN agency, has built a system of document alignment based on a standardized short-form ocean bill of lading. This is now being widely used on the European continent, in some East European countries and in the U.S.S.R. Exporters there claim that it can save up to 70 per cent of export documentation costs. Britain has tailored the ECE system to its own needs and many Commonwealth countries offer an alternative format for Commonwealth Certificates conforming to the British version of the ECE system.

The National Economic Development Office in Britain set up a group to "radically review current international trade documentation and procedures". The chairman is Lord Thorneycroft, a former Minister of Finance and President of the Board of Trade and now a leading figure in the private sector. The group will not only concern itself with the simplification and alignment of documents but will also study the use of computers to transfer trade document information and will even consider the eventual elimination of today's fundamental documents such

as the bill of lading and the export entry form. The Canadian Export Association has established contact with the group and is watching its work with great interest.

In the United States, private business two years ago established the National Committee on International Trade Documentation to initiate and coordinate a drive to cut down the cost of trade documentation. Shortly afterwards the U.S. Government gave a similar task of co-ordinating its own documentation requirements to a division of the U.S. Department of Transportation. The Canadian Export Association maintains close contact with both these bodies. For some years, a limited system of document alignment has been successfully operated at some U.S. ports which enables the following documents to be completed at one typing: export declaration (equivalent to the Canadian B-13), ocean bill of lading, dock receipt, certificate of origin, delivery instructions, drawback form, advance shipping notice, insurance certificate, invoice, lightage instructions and delivery order.

In recent months, three draft world multipurpose intermodal bills of lading have been designed which are suitable for any form of reproduction and for data processing. One was prepared by the United States, another by the ECE, and the third by the International Chamber of Shipping. It is hoped that these will lead to one universally accepted trade document around which other trade documents may be aligned. The implications of these developments were put succinctly by the Secretary of the British Committee for the Simplification of International Trade Procedures when he said: "Canada's real choice seems to be between the ECE and the U.S., between the many and the most influential, or else to wait until the two are reconciled". Because of the complexities of the issues and the large number

of interests involved, the Canadian Export Association does not expect a reconciliation to come about quickly.

In the meantime, the Canadian Export Association is acting as a clearing-house for information on the subject, keeping the exporting community informed of developments. An advisory group of experts draws on the expertise of over 100 businessmen concerned with various aspects of trade documentation and an extensive study of commercial documentation required is being undertaken. A copy of the questionnaire being used for this study may be had from the Secretary of the Canadian Export Association, Suite 1020, Commerce House, 1080 Beaver Hall Hill, Montreal 128.

Many other bodies are involved, including the Canadian Government's interdepartmental Canadian Maritime Facilitation Committee which is concerned with the simplification and facilitation of ship documentation in connection with a program undertaken by the Intergovernmental Maritime Consultative Organization. Canadian international air freight carriers have, of course, adopted the IATA uniform air waybill. The Canadian Bankers' Association and the Canadian Export Association are discussing the simplification of letter-of-credit procedures, the use of one negotiable copy bill of lading and a single mailing of commercial documents, and the advantages of Canadian banks adhering to the International Chamber of Commerce's *Uniform Rules for the Collection of Commercial Paper*. The Canadian Government departments concerned have expressed a willingness to work with the Canadian Export Association on changes in the B-13 and other forms when it is timely. Canada has a lot to gain from the streamlining of export documentation and will be playing an increasingly useful role in international discussions of the many problems involved.

## It's on the Carrousel!



Whose luggage? Are the owners lost—or the baggage? Don't worry about that problem; look at the Carrousel itself, the luggage dispenser. It was designed in Canada by Mathews Conveyor Co. of Port Hope, Ontario, made in Switzerland under licence, and is one of six

dispensers in service in the arrivals hall of the Kloten International Airport in Zurich. Three more conveyors will soon be installed at the new Basle-Mulhouse Airport; they too are being produced by Walter Stocklin AG of Dornach, the licensee.

*If undelivered return to:*  
The Queen's Printer, Ottawa, Canada

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