

foreign trade

Doing Business in Iran

Truck Components Market
in the 70's

Foreign Trade Service Abroad

Department of Industry, Trade and Commerce, Canada

January 2/71



In This Issue

The picture on our cover, showing a geological survey party in the north-west of Iran in search of new oil-fields, is the inevitable choice for an issue that features Iran—today the leading oil producer in the Middle East and the fourth largest in the world. Almost as inevitable is the one selected for the back cover, because agriculture still contributes as much as 23 per cent to the Iranian GNP.

As the leading article makes clear, the Iranians, under a progressive ruler, are proceeding to build up non-oil industries, to improve transportation and communications, to develop new mines, and to modernize agriculture. The Assistant Commercial Secretary in Tehran in his article talks about what is going forward in the country in terms of opportunities that are arising for Canadian exporters. In the communications field alone, two Canadian firms are working, one as part of a consortium engaged in the further development of the integrated national telecommunications system, and another on the upgrading of the CENTO microwave system. (CENTO stands for Central Treaty Organization, of which Iran, Pakistan, Turkey and Britain are members.)

D. H. M. Branion, Commercial Secretary in Tehran, contributes a practical piece on the techniques of doing business with the Iranians, including price quotations, terms of payment, tariffs, shipping services, and so on. That many Canadians are mastering these techniques is proved by the fact that sales to Iran from January to the end of September 1970 totalled \$4.1 million, compared with \$3.4 million in the same months of 1969. Two types of equipment—for schools and for hospitals and health care—are discussed at some length.

From a developing market, we move quickly to a highly developed one, much nearer than Iran. The Detroit office has contributed a piece on the booming market in the United States for truck components, particularly those for heavy-duty trucks. It is an article that gets down to brass tacks; it includes statistics about the size of that market and pinpoints the best opportunities for Canadian suppliers.

Most Canadians who have visited or who have read extensively about modern Italy are aware of the gap in development and in living standards

between the industrial north and the agricultural south. For many years the Italian Government has been striving to narrow that gap by attracting new industries to the area and improving conditions there. As part of the "Cassa per il Mezzogiorno", or Fund for Developing the South, it offers incentives to industries to locate there. One of the Canadian companies that has gone into the South and built a plant is Massey-Ferguson Limited, which chose Aprilia as a site. Its plant there was opened some two years ago. David Wright of our Rome office visited this plant and talked with its executives; the result is a case history of why Massey-Ferguson selected Aprilia and the problems it met and overcame. The MF Italian operation now serves a worldwide market.

At long last, this issue also contains the revised Foreign Trade Service Abroad directory, including the details about the Peking office that opens this month. We hope to publish this directory regularly, probably in every third issue of the magazine.

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Vol. 135 No. 1

January 2/71



The Hon. Jean-Luc Pepin, Minister
J. H. Warren, Deputy Minister

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

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Address correspondence to the
Editor, "Foreign Trade", Tower B,
Place de Ville, 112 Kent Street,
Ottawa, Canada.

Subscription

\$5 a year in Canada, \$7 abroad.
Single copies 25 cents each.
Please forward all orders, with
cheque or money order made out
to the Receiver General of Canada,
to Information Canada, Ottawa,
Canada.

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Iran

What Prospects for Canadian Exporters?

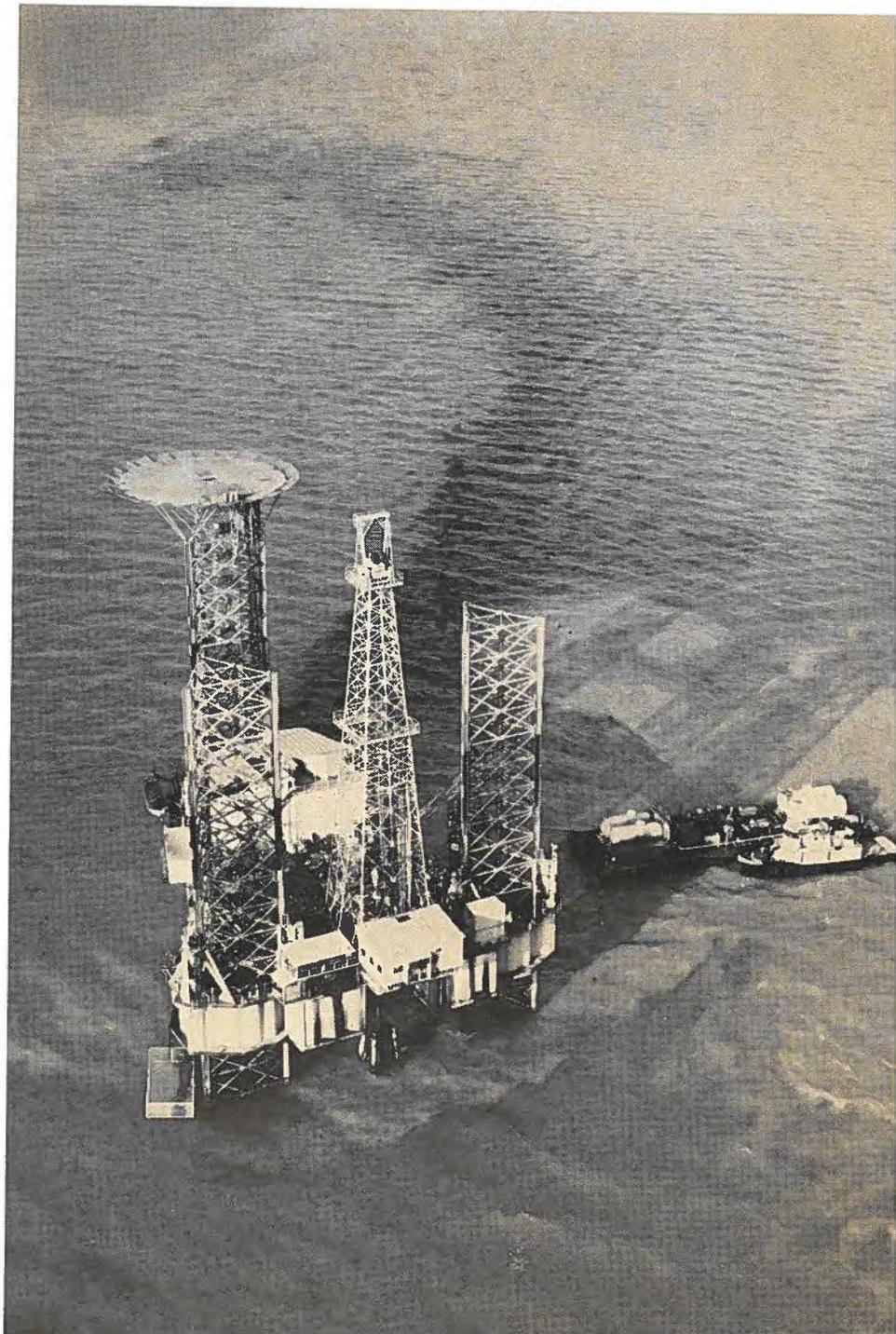
Here's a country with stability, great natural resources, rising imports, ambitious plans—a country on the move. How can Canadian companies share in developing its great potential?

G. C. LAMBERT
Assistant Commercial Secretary
Tehran

Iran. Persia. How much do Canadians know about this ancient and distant land. Carpets? Of course. Oil and caviar? Yes. The Iranian pavilion at Expo '67 with its typical blue tiling and the visits of His Imperial Majesty the Shahanshah? Certainly. But, unfortunately, not a great deal more. This lack of knowledge about today's Iran is, unhappily, matched by an equally general Iranian ignorance about Canada.

The two governments are doing their best to change this situation. His Imperial Majesty the Shahanshah of Iran has visited Canada twice in the past five years and Iran's participation in Expo '67 was of a high standard. In the fall of 1969 the Second Asian International Trade Fair was held in Tehran. Canada was the first foreign country to choose a site for a pavilion there. To mark the opening of the Fair, the Honorable Jean-Luc Pepin, Minister of Industry, Trade and Commerce, came to Tehran for discussions with His Imperial Majesty the Shahanshah, the Prime Minister, and members of the Cabinet. Included in the Minister's party were officials from his Department and from the Export Development Corporation. They came to explore new avenues of trade and investment.

In 1968-69 Iran imported U.S.\$1.35 billion worth of goods, but only about \$5 million worth came from Canada. Why are we not doing better? This is partly because this is a rather unknown



market and not actively cultivated by many Canadian exporters. The Embassy is doing its utmost to remedy the lack of knowledge among Iranians about Canada, and particularly about Canadian products and services, and is gradually meeting with success. The following information should also help the Canadian businessman.

What kind of a country is Iran? First, it is about one-tenth the size of Canada, with a population of about 27 million. Nearly surrounded by mountains and bordered on the west by Iraq and Turkey, on the north by the Soviet Union and the Caspian Sea, on the east by Afghanistan and Pakistan, and on the south by the fabulously oil-rich Persian Gulf and the Oman Sea, Iran is a distinct geographical and cultural unit. Combine this with marked political stability, a wealth of natural resources, energetic and enlightened leadership, and a picture emerges of a bustling, industrializing country, based on a 2,500-year-old empire.

The passing of the old ways is in many respects a great pity. The tourist is sometimes disappointed because Tehran's streets are filled with its almost three million people and Iranian-made modern cars, trucks and buses, all driven by Kamikaze-like drivers who make one very nimble indeed. But there are no camels. Middle and upper class mothers still wear chadors while walking beside their mini-skirted daughters but under the chador—a head-to-toe covering—they themselves are often wearing the latest in fashions. The Government and industry are doing their best to meet the needs of this new society and they are using to a large extent foreign expertise and technology to assist and supplement domestic Iranian capabilities.

Peace, political stability, and the enormous natural resources, particularly petroleum, have contributed to a rapid expansion of the economy on all fronts, including foreign trade and investment. The stability of the rial (76.25 R. equals U.S.\$1) has been preserved by a

The search for new oilfields in Iran was extended offshore several years ago. This drilling rig is being operated along the northern continental shelf in the Persian Gulf by the Société Iran-Italienne des Pétroles, which has already made some discoveries there.



These Iranian farmers are winnowing wheat in the traditional way on a farm near Kermanshah. The country has ten million acres devoted to growing wheat, producing in 1968-69 four million metric tons, compared with 4.9 million in 1967-68.

concerted effort on the part of the Government and the Central Bank. Unfortunately for foreign exporters, the tools used to combat the problem of low reserves include requirements for advance deposits for import registration, a 4 per cent tax on the transfer of foreign exchange, the prohibition of imports of certain luxury goods, and the possibility of quantitative controls for other categories.

Nevertheless, there is still ample scope for the sale of Canadian goods and services. Imports have been rising at an average annual rate of 22 per cent. Exports in 1968-69 totalled U.S.\$2.035 billion. Exports account for less than 3 per cent of the GNP and equal only 15.8 per cent of the import bill. In 1969 Canadian exports to Iran totalled \$5.2 million and imports from Iran \$30.2 million, of which \$28.7 million was crude oil. For the first nine months of 1970, Canadian exports reached \$4.1 million. Iranian imports are expected to rise to more than U.S.\$2 billion a year by 1973, and the major portion will consist of raw materials and capital equipment.

In what fields can Canadian exporters compete best, and what are the opportunities in those fields? The next paragraphs try to answer these questions.

Oilfield Equipment—The next major development in the petroleum industry will probably be the export of liquefied petroleum gas. Internal pipeline distribution systems are being planned and built, as are a number of large pipelines to the Soviet Union and Turkey. New crude development should take place in the Caspian Sea in northwest Iran. Additional refining capacity is constantly required to cope with increased production targets. Thus, the potential for Canadian oilfield equipment is good, but Canadian companies must come to Iran to survey the market and make personal contact with people in the National Iranian Oil Company, the Consortium, and the joint venture companies. Firms that have come here have secured profitable business and generally repeat orders.

Telecommunications and Electronics—The major public sector undertaking in the telecommunications field is the

Regional Co-operation for Development (RCD)

RCD, formed in 1964 between Turkey, Iran and Pakistan, has among its aims the following:

1. Free or freer movement of goods among the three countries.
2. Closer collaboration in industry leading to a joint Chamber of Commerce.
3. The formulation and implementation of joint industrial projects.
4. More efficient and less expensive inter-country communications.
5. The establishment of a strong international airline among the three countries.
6. The establishment of a joint shipping line.
7. Inter-country exchanges of technicians and joint training programs.

To work toward these goals, RCD is structured on three levels, with a permanent Secretariat located in Tehran. The highest decision-making body is the Council of Ministers, one Minister from each country. The second level is the Regional Planning Council, consisting of the head of each country's Plan Organization. The third and work-

ing level consists of seven committees, each concerned with a particular sphere of co-operation. All levels hold regular meetings.

The RCD has approved 55 joint purpose enterprises, 14 of which are in production or were expected to be on stream by late 1970. Twelve of the 55 projects are to be located in Iran. A \$50 million aluminum smelter at Arak is under construction, and a glycerine plant is now in operation. Other RCD projects in Iran cover a wide range of products, including plants for the production of carbon products, seamless pipes and tubes, chemicals, diesel generators and electric motors, diesel engines, and so on. Participation in these projects is achieved by a combination of private investment, host government investment, and small shareholdings by either or both of the other two RCD governments.

Other projects well in hand include the construction of the highway linking Turkey and Pakistan via Iran, the operation of the RCD Shipping Line, which is a consortium of the three national shipping lines, and an Iran-Turkey rail line. Talks are taking place on the establishment of an RCD airline to operate jumbo jets. Some 26 new projects are under construction, including plants for making turbo-

generators, ships, boilers and pressure vessels, and for the production of petrochemicals. These studies should be completed soon.

Although the growth rate in inter-country trade has only been some 2 per cent a year, a development which probably would have occurred without RCD, the effect of joint-venture production has not yet been felt and will probably be fairly significant. And, for Canadians, the market possibilities in this multi-million-dollar development program should not be ignored. If Canadians wish to secure a share of this business, they should come to Iran while the projects are still in the discussion stage. The Embassy staff in Tehran—as in Islamabad and Ankara—is here to assist them because this market presents some difficulties. Most of the projects involve private investment, usually foreign, by companies who bring them the technology and managerial skills needed to make the plants viable. This, of course, also means that the source of capital influences the source of supply, a definite advantage when Canadian capital is involved. Nevertheless, where non-Canadian investment is concerned, availability, building to specifications, flexibility, expertise and financing, all of which can make a Canadian offer attractive, are important factors.

development of a national telecommunications system for Iran. A U.S.\$180 million contract has been awarded to an international consortium, and Canada will supply about U.S.\$5 million worth of equipment. As well, the upgrading of the CENTO microwave network linking Ankara and Karachi via Iran has led to a U.S.\$2 million contract being let to a Canadian supplier. Canadian engineering has also been used by the military, the National Iranian Oil Co., and the Ministry of Water and Power to develop communications and power-dispatching systems. In the private sector, a number of Canadian firms are supplying equipment and components for local assembly. Iran will be switching to single side-band radio in 1971, and at least one Canadian firm is actively developing the market.

Forest Products—About 10 per cent of Iran is forest, most of it in the Caspian region. Some 1.33 million acres of both hardwood and softwood are considered commercially exploitable, although development so far has been largely confined to the annual production of 300,000 tons of charcoal. In 1963, all forests in Iran were nationalized, and an extensive program of afforestation has been carried out. Present consumption is estimated to be about 15 million cubic meters of timber per year.

Last year Iran imported \$10 million worth of timber, \$500,000 worth of veneer, and \$3 million worth of plywood. None of it came from Canada. Paper products in all forms accounted for another \$30 million, including newsprint imports worth \$1.6 million.

Canada's share of this market was almost nil. Iran is also a good area for investment in this field. The Government is seeking private investment for the development of the Caspian forests at both primary and secondary levels, and negotiations are under way to establish a paper mill in Khuzestan in the south.

Mining—Iran has large mineral resources, including lead, zinc, chromite, iron, copper, red oxide, and manganese. There are also substantial deposits of antimony, nickel, cobalt, tungsten, gold and silver. Mining in Iran is a state monopoly but licences are granted to private firms for exploitation. During the course of the Fourth Plan, the Government has allocated \$56 million for fixed investment, and wants to attract a further \$25 million worth of

private investment. Imports of mining machinery are to be increased substantially. The main project is the exploitation of copper reserves of about 400 million tons. Some Canadian expertise and equipment have been used in recovering other minerals, but there are tremendous opportunities in this field for the sale of Canadian services and equipment for exploration and development.

Fisheries—Fishing is concentrated in the Caspian Sea and the Persian Gulf. There are severe problems in both areas and a major study will be undertaken to seek long-term solutions. The Caspian Sea production of sturgeon and caviar is declining because of pollution, poor methodology, and rapid shrinking of this sea through evaporation. A Canadian consultant recently surveyed the Gulf fisheries for a private company and the Plan Organization has indicated a desire to contract for a long-term intensive study of the area, possibly with a Canadian firm. By 1973 the Iranian Government Plan Organization will have spent some \$9 million in developing small harbor facilities. If Canadian companies are quick off the mark, this sector could provide extensive opportunities for the sale of engineering knowhow and possibly Canadian fishing vessels.

Agriculture—Iran is a land of difficult topography and extremes of climate in which agriculture plays an extremely important role in a rapidly industrializing economy. With some 17.5 million acres under cultivation—10 million of which are planted to wheat—more than 50 per cent of the population depends on farming for its existence, but provides only 23 per cent of the GNP. During the Fourth Plan, the Government has allocated almost one billion dollars to the agricultural sector for a variety of programs designed to raise output from \$1.6 billion in 1965 to \$2.4 billion by 1971. At the moment only some 13 per cent of a total area of 407 million acres is considered arable and 12.5 million acres are irrigated. The water resources program is expected to make available sufficient water to bring another 10 million acres under cultivation. The Government is also attempting to improve yields through the use of improved seed, chemical fertilizers and farm mechanization and to encourage more livestock breeding using imported stock.

To take advantage of the potential in this area requires capital, and perhaps the most progressive step the Government has taken since the reallocation of land is the move towards allocating large tracts of land under medium-term lease to companies, either national or foreign, that have the requisite capital and managerial skills to operate large agricultural units. The program has high priority and, as high Iranian authorities suggest, could be of interest to Canadian firms. There are three such ventures under way, two American and one Yugoslavian, but there is ample scope for further projects.

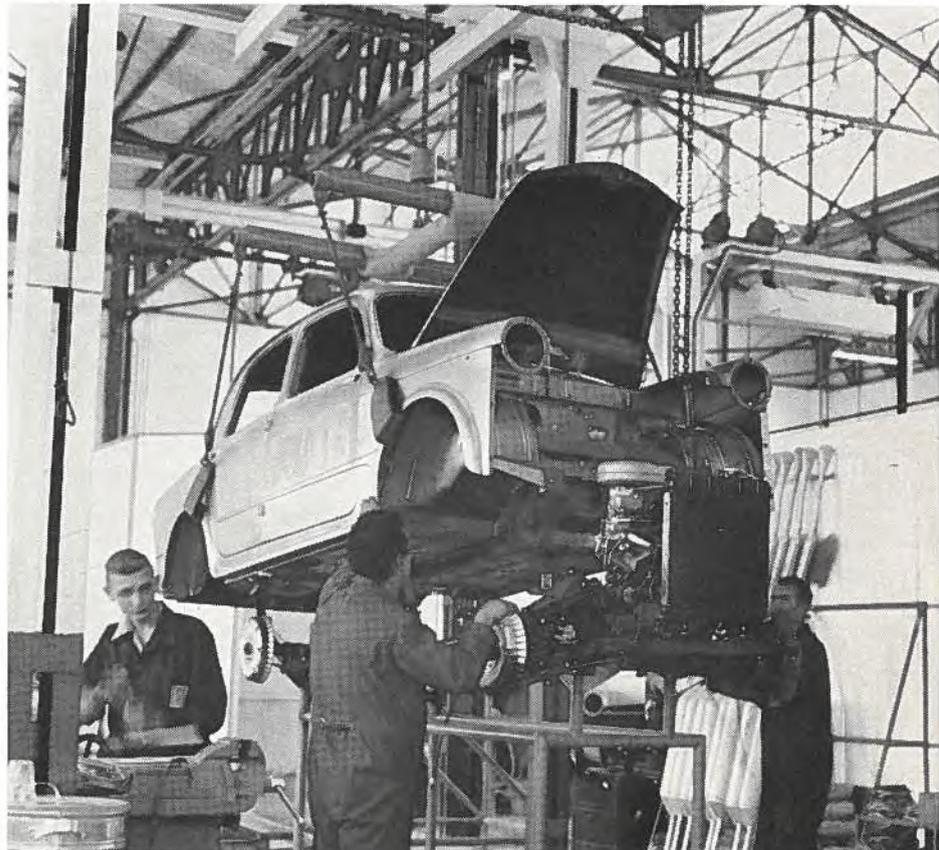
Many of the projects outlined above are part of the Fourth Development Plan, which began in March 1968 and ends in March 1973. It proposes an investment of U.S.\$12 billion, divided among agriculture, industry, mining, oil and gas, transportation and communications, etc. On major projects involving foreign loans, it is the Plan Organization which negotiates and signs government-to-government financing agreements. It also involves itself in the pre-selection of companies selling services or supplies that will be invited to tender or to negotiate con-

tracts with the various Ministries. Before a foreign company can do business in the public sector here, it must register with the Plan Organization. Our office in Tehran will be able to supply further information or to introduce Canadian companies to Plan officials.

Other opportunities for Canadian suppliers are offered by the RCD (Regional Co-operation for Development) which is undertaking joint projects. For particulars, see the accompanying box feature.

Generally speaking, although there are notable exceptions, the key to export success in Iran is the right agent and the Commercial Division of the Embassy can help in locating potential representatives for your company. If you are planning to visit other countries in the area, a stopover in Iran could prove profitable. It is a country with a wealth of resources, an energetic and able population, and a will to improve its position in the world. It is a country on the move and there is plenty of scope for Canadians to be a part of that movement. Come and see for yourself.

In the Fiat automobile plant in Tehran, a car moves down the production line. Originally, the automotive industry imported most of the parts and carried out an assembly operation; now components are also made within the country.



Doing Business in Iran

This briefing on the mechanics of trading with Iran should help smooth your path to sales there.

DOUGLAS H. M. BRANION
Commercial Secretary, Tehran

There are two principal markets in Iran of interest to Canadian companies: one is the Government, which makes substantial purchases, and the other is the private sector. A substantial amount of the Government's purchasing is done through international tendering procedures, although if foreign credits are being used, from time to time negotiated contracts are signed. The methods of doing business in the private sector are varied and range from activities in the bazaar to negotiating contracts with established Iranian manufacturers. Virtually all business is done in the capital.

Iranian merchants do not fall into clearly separated categories and a firm may act as a commission agent in some transactions and in others import on its own account, either for direct sale or for resale to others. With certain exceptions, a high degree of specialization is not usual and many reputable firms deal in a wide variety of goods. Some agents, however, may specialize in a particular field—for example, government, oil and associated industries, etc.—rather than in particular commodities.

Few Iranian firms have an extensive organization. In Tehran brokers act as intermediaries between importers and retailers for many commodities, and in the provinces a large number of Tehran firms rely on local merchants with whom they are associated, rather than maintaining branches or sending out travellers of their own. Most agency business is concentrated in Tehran, and it is unnecessary to divide the country into several agencies. It is essential, however, to ensure that the agent has good provincial outlets and a satisfactory distribution organization, things that some agents lack.

It should be realized that the resources and the efficiency of a firm are often



In a part of the Bazaar in Tehran that specializes in automotive parts and related products, an Iranian merchant takes a business call, while two visitors wait to discuss with him the selling of Canadian-made hand tools.

far greater than its modest office or shop may suggest. Canadian firms seeking agents are therefore advised to approach the selection with as open a mind as possible.

When the volume of business is sufficient, it is desirable to have a Canadian representative in Tehran, working in co-operation with an Iranian agent. Iranian agents are inclined to be more interested in sales than in servicing and Canadian firms are advised to make sure that particular attention is paid to servicing arrangements. Before appointing an agent, firms should obtain a credit report on the one they wish to choose.

Companies interested in negotiating major government contracts are strongly advised to discuss the matter in detail with the Commercial Section of the Canadian Embassy in Tehran before coming to an arrangement with

a local firm. Most large contracts for development are likely to be handled by the Plan Organization which normally employs international calls for tender supervised by consulting engineers. In addition, a wide variety of government departments may issue calls for tender for equipment. In almost all instances, bank guarantees of performance have to be provided and bank guarantees on down payments are also frequently required.

In the oil industry, the Consortium of oil companies, which is responsible for most of the basic activities (extraction and refining), has in the past obtained its requirements through its own purchasing organization, Iranian Oil Services Limited, in London. The present policy, however, is to buy as much as possible in the local market or through local agents of foreign manufacturers. The National Iranian Oil Company maintains its own purchas-

ing department in Tehran for all its needs.

Mail—We have found that the average time for delivery of airmail from Canada to Iran is approximately seven to ten days; seairmail takes anywhere from one to three months. Correspondence and trade literature may be in English or French, but before foreign mail can be delivered, addresses have to be translated into Persian script. It is therefore useful to consider using the Commercial Section of the Canadian Embassy as a post office.

Price Quotations—Prices should be quoted in either Iranian rials (70.42 rials = Cdn.\$1.00) or U.S. dollars, c.i.f. or c. and f. Khorramshahr. On a number of contracts we have dealt with Iranian firms and the Government has asked for c. and f. quotations. It is normal practice for Iranian firms to purchase insurance from national Iranian companies.

Terms of Payment—For commercial imports, a letter of credit may be opened for four months and can be extended once for a further three months without the approval of the Exchange Control Office.

For imports on government account, a letter of credit can be opened for an indefinite period, depending on the terms of each particular account.

Letters of credit should be opened before the goods are shipped. When opening letters of credit, importers are required to make a cash deposit varying with the essentiality of the goods.

Shipping—Unfortunately, shipping service between Canada and Iran is not particularly good and many Canadian firms who are selling consistently to this market ship through New York. One or two lines there have two sailings per month non-stop from New York to Khorramshahr. From time to time, however, there are charters leaving from Canada and interested exporters would be well advised to contact the Industrial Traffic Services Division of the Department of Industry, Trade and Commerce.

Air cargo services between Canada and Iran are quite good and using these eliminates the necessity of goods being transported by either rail or truck from

Khorramshahr in the south to Tehran in the north.

Customs Tariff—Each March 21 (the start of the Iranian year), the Customs authorities issue a new customs tariff. Generally speaking, if a product is made in Iran, imports of similar products are either prohibited or the duty is substantial. Exporters who want up-to-date information on Iranian tariffs should contact the Office of Area Relations, Department of Industry, Trade and Commerce.

Visits—It goes without saying that the most important thing in establishing business relations with an Iranian company is to make a personal visit. As noted above, correspondence between Canada and Iran is apt to be slow. In addition, although most agents can speak English reasonably well, it is much more difficult for them to carry on a correspondence in that language.

For a Canadian firm that has had no previous dealings in the Middle East or Asia, bargaining may well be a new experience. Particularly in the bazaar trade, bargaining is a way of life. This is easily understood once one visits the

Tehran Bazaar where, for example, six companies selling shoes will have stands side by side. To keep solvent, these traders must have a quick turnover. They often cut their profits to a bare minimum and they expect their suppliers to do the same. Therefore, Canadian suppliers should be prepared for long and sometimes arduous discussions about the prices of their products. If one approaches this bargaining process in the right vein, it can be a highly interesting experience. If, however, one is used to concluding a deal in North America in 15 minutes, one should perhaps think twice before getting involved in this market.

The first two words of Farsi which any foreigner learns in Tehran are "farda" which means "tomorrow" and "inshallah" which means "God willing". Here is an example of how these words are used. An Iranian contractor won a contract for completion of "x" kilometers of road by a certain date. Two days before the completion of the contract, the Governor of the province finally caught up with the contractor who had not yet started work. The Governor asked him how he proposed to finish on time. The contractor's straightforward reply was "Inshallah".



Oriental carpets, hand-knotted, rank next to oil among Iranian exports. As this picture shows, children are trained while they are quite young in the intricate weaving process. The loom at which they work is in a small settlement near Isfahan.

Iran Buys Educational, Health Equipment

Fourth Development Plan calls for sharp improvement in educational and health facilities in Iran. Already, some active Canadian companies have made sales as a result of the continuing program.

D. H. M. BRANION, Commercial Secretary, Tehran

It has been stated many times and in many countries that a nation's most important asset is its human resources.

The First and Second Development Plans of Iran laid the basis for comprehensive technical and vocational training for a widely-dispersed, basically illiterate population. In 1966 less than 30 per cent of Iran's people could read and write. However, not until the Third Development Plan, beginning in 1963, were educational plans approaching a sufficient level to meet the needs of the rapidly industrializing nation.

The Third Plan paid increasing attention to widespread illiteracy and the lack of sufficient technical training capacity in secondary and higher levels that could impede the economic and social growth of Iran and reduce the

productivity of development projects. Education was accepted as an essential and complementary part of the national development plan.

In spite of the efforts of the Third Plan, certain sectors of the educational system were still deficient in 1967. Higher education was not up to the standard of other developing countries. A rationale had to be made between general secondary school education and technical and vocational education. The Third Plan had concentrated on quantitative expansion and the improvement in quality was not great enough; teaching methods, materials and the plant itself still had to be improved.

The general objective of the Fourth Education Plan (March '68/March '72) is to improve the quality of education

while maintaining a better balance between the various types. Educational effort is being concentrated on developing skilled manpower to correspond with the needs of the Development Plans.

A new system is being introduced at the primary and secondary levels. Instead of two six-year periods of primary and secondary schooling, there will be three periods consisting of a five-year primary, a three-year academic guidance and a four-year secondary. The guidance period will assist students in their choice of employment, weighing the factors of desire, talent, and the needs of the country. A major objective is to have compulsory free education up to age 14, as soon as possible.

Combined vocational and theoretical education and comprehensive schools will turn out the personnel required for middle-level staffing for the service sector of the economy. During the Plan period, 46,000 students will graduate from these institutions. In order to upgrade farming techniques, specialized agricultural schools will train approximately 70,000 farmers.

Iran will continue its highly successful literacy program. It is hoped to increase the literacy rate in the 10 to 45 age group by 60 per cent, so that new literates during the Fourth Plan will number 4.4 million.

Iranian children like these have the chance of a better education geared to their needs, thanks to the Fourth Education Plan. The objective is to introduce compulsory education to age 14 as soon as this is practicable.



In the higher education field, in order to make it unnecessary for students to go abroad, the Fourth Plan will improve the quality of higher education, increase the number of students, establish new fields of study, and fully utilize all of the present university facilities. The Plan calls for an enrollment of 60,000 university students, which represents a 60 per cent increase over the Third Plan. A total of 55 per cent of these students will receive education in the scientific, technical and industrial fields.

Where health is concerned, the Fourth Iranian Development Plan covers preventive activities, environmental sanitation, improved nutritional standards, education of the public and

medical care. Public health networks will be built throughout the country and it is hoped the Fourth Plan will secure minimum health needs for the whole population.

During the Fourth Plan 145 health centers will be established and sewage disposal and provision of potable water throughout the country will be studied. Urban medical facilities will be increased by 14,500 hospital beds and the standards of another existing 5,600 beds will be improved. By the end of the Fourth Plan there will be 45,000 beds or 15 hospital beds per 10,000 population.

The Plan calls for 2,500 chronic disease beds in government hospitals, and 1,100 training hospital beds in the public sector. In addition, the private sector will add another 4,000 beds.

In this field, the Fourth Plan concentrates on training health services personnel, balancing manpower training, and developing medical and health activities. During the period five new nurses' training schools will be set up, 10 schools for nurses' assistants, three schools for sanitary assistants, and one for training laboratory technicians.

Another major objective of the Fourth Plan is development of health and medical research and new health research institutes are being set up and existing ones expanded.

Obviously, the expenditures planned by Iran create a market for countries advanced in educational and health equipment. Canada has already captured a share of this market and here are some examples of how progressive firms can win a share of it.

An Ontario/Quebec company supplying educational training equipment entered the Iranian market three years ago with the help of a good agent. This firm also exhibited in the Canadian Pavilion at the Second Asian International Fair. Its sales last year were expected to reach some \$200,000. At the same fair, Atomic Energy of Canada exhibited and sold a cobalt bomb unit.

Another company visited Iran with an Ontario trade mission. It has now received a contract from the Ministry of Science and Higher Education for consulting work.

Other Canadian companies are busy looking for agents in both the equipment and pharmaceutical fields.

These examples prove that the educational and health fields offer opportunities for Canadian firms. A personal visit is the best way to cultivate the market but where this is impossible, write to the Commercial Secretary, Canadian Embassy, P.O. Box 1610, Tehran, Iran, and send with your letter catalogues or other sales literature and prices c. and f. an Iranian port.

TABLE 1

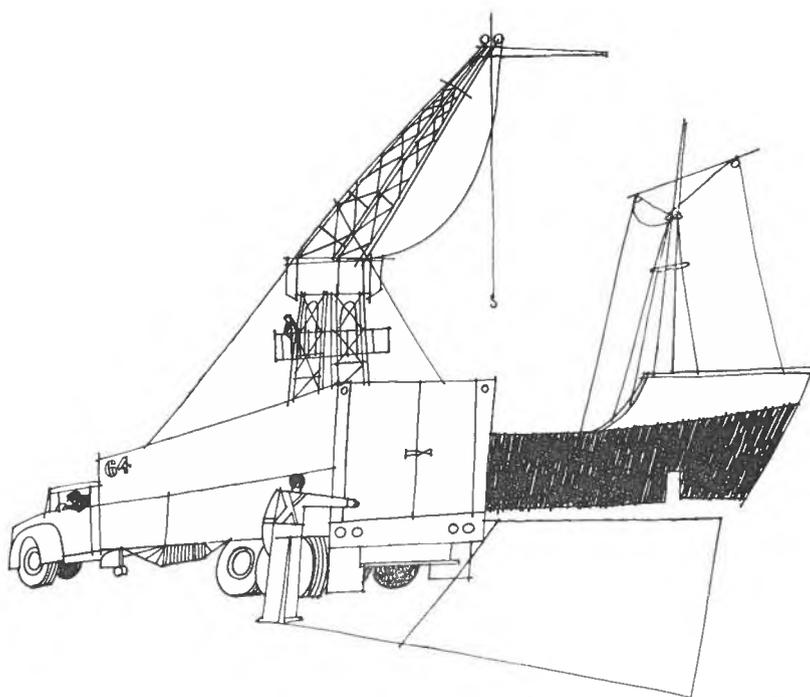
DISTRIBUTION OF DEVELOPMENT FUNDS TO EDUCATION DURING THE FOURTH PLAN

Type of activity	Cdn.\$
Kindergarten education	85,200
Primary education	178,522,400
Planning institute and educational radio and television	1,661,400
Campaign against illiteracy	42,017,800
Academic guidance courses	81,934,000
Comprehensive and combined vocational training	28,229,600
Theoretical secondary education	15,620,000
Technical and vocational training	31,069,600
University education	85,000,000
Scientific research	4,260,000
On-the-job training	25,560,000
Sending of students abroad	2,840,000
Total	497,000,000

TABLE 2

TOTAL NEW ALLOCATIONS FOR MEDICAL AND HEALTH SERVICES DURING FOURTH PLAN

Title of program	Cdn.\$
Health services	122,120,000
Medical care services	199,510,000
Combined medical and health services	36,210,000
Training of technical personnel	7,100,000
Medical and health research	3,550,000
Total	368,490,000



Truck Components Big Market for the 70's

Proximity, duty-free entry under the Automotive Agreement, and the wide range of parts needed make the U.S. truck industry a worthwhile market for Canadian suppliers.

W. B. SCHUMACHER, Vice Consul and Assistant Trade Commissioner, Detroit

In spite of the slump in automotive sales, manufacturers are proceeding with truck assembly plant expansions based on optimistic market projections for the seventies. With the expected market growth will come greater opportunities for present and potential suppliers of truck components.

The past decade has seen rapid economic expansion in the United States and the truck industry has kept pace. Table 1 lists new truck registrations by major manufacturers for the period 1960 to 1968. Though registrations are somewhat out of phase with production, they emphasize the fact that truck production has almost doubled in the past ten years. Car sales, on the other hand, only increased by approximately 60 per cent during the same period.

The major factor in this surge was the greater demand for distribution of goods and services because of rapidly rising population and gross national product. Other contributors to the larger market for medium and heavy trucks were the construction boom, the migration of population from the cities to the suburbs, the interstate highway system, and the development of larger and heavier trucks that resulted in increased efficiency and greater use of truck transportation.

Light truck sales also increased considerably because of the use of truck-type vehicles for campers and mobile homes and as second vehicles for personal transportation.

And this growth will continue during the next ten years. Table 2 shows U.S. factory shipments of trucks and buses for 1968 by gross vehicle weight (GVW). The continuing popularity of the pick-up camper (150,000 units in 1968 and a



About half of every dollar spent on automotive sales goes to suppliers for goods and services. This means a good market for manufacturers of truck components, even for the smaller Canadian firm that cannot keep pace with automotive volumes.

projected 375,000 in 1980) should ensure a substantial growth in the light-duty truck segment (under 10,000 pounds GVW).

The area of greatest growth, however, will be the heavy-duty segment. The Ford Motor Company alone has invested more than \$600 million in truck products and manufacturing facilities during the last ten years, much of it for heavy truck production such as the Louisville, Kentucky, plant. The reason? From approximately 140,000 light heavy (19,500 to 26,000 pounds GVW) units in 1968, it has been esti-

mated that U.S. production will reach 410,000 in 1980. Similarly, for units of 26,000 pounds GVW and over, the 1968 production of approximately 130,000 will be far exceeded by the expected production of 330,000 units in 1980.

But measuring by numbers alone does not tell the whole story. Many of these large trucks cost up to \$30,000 at retail—equivalent to 15 minicars! It has been estimated that, on the average, about 50 cents of every automotive sales dollar is paid to suppliers for goods and services. Because truck

TABLE 1

U.S. NEW TRUCK REGISTRATIONS BY MAJOR MANUFACTURERS, 1960-68

	Number of Units								
	1960	1961	1962	1963	1964	1965	1966	1967	1968
Brockway	1,103	979	1,074	1,206	1,100	1,047	1,288	1,248	1,298
Chevrolet	316,962	306,175	366,506	425,406	483,853	567,473	585,561	551,923	626,858
Diamond Reo	2,421	1,795	1,820	2,072	1,992	2,486	2,874	3,913	3,539
Dodge	43,606	40,147	55,593	75,025	98,030	116,639	120,082	101,458	138,205
Ford	280,501	289,214	332,328	382,099	404,999	477,068	522,307	494,921	624,894
FWD	515	563	615	445	472	536	628	445	520
GMC	82,546	69,596	80,590	87,814	99,148	118,273	115,122	113,982	133,308
International	110,349	116,538	130,959	145,105	148,008	148,195	155,556	150,946	140,948
Kenworth	1,400	1,135	1,316	1,997	2,347	2,876	2,472	2,912	4,008
Mack	10,876	8,618	10,353	12,099	12,064	13,127	15,014	13,434	14,932
Peterbilt	810	714	1,158	1,482	1,812	2,023	2,374	2,230	3,023
White	14,179	13,199	15,151	16,438	16,609	18,954	23,067	17,458	19,905
Jeep Truck	31,385	32,644	30,426	44,339	44,385	42,415	42,860	39,757	38,486
Others (incl. imports)	37,805	29,462	32,653	41,164	43,233	15,610	18,378	22,607	25,614
Total	934,458	910,779	1,060,542	1,236,691	1,358,052	1,526,722	1,608,583	1,517,234	1,775,538

Source: Ward's 1969 Automotive Yearbook

TABLE 2

U.S. TRUCK AND BUS FACTORY SHIPMENTS 1968

GVW * in pounds	Number of Units					
	Total on industry	Chevrolet	GMC	Dodge	Ford	Duplex
Light Duty						
6,000 or less	1,136,100	464,000	67,000	88,300	399,600	—
6,001—10,000	385,800	6,001	34,100	57,900	134,100	—
Medium Duty						
10,001—14,000	4,600	—	—	200	—	—
14,001—16,000	17,500	7,600	—	3,600	6,300	—
16,001—19,500	79,400	48,800	3,000	7,600	20,000	—
Heavy Duty						
19,501—26,000	141,300	19,400	26,000	10,000	43,100	—
26,001—33,000	41,800	1,800	11,700	2,200	7,600	100
33,001 and over	89,600	1,900	7,400	1,300	10,900	300
Grand Total	1,896,100	679,800	149,200	171,200	621,600	400
		FWD	International	Mack	White	Jeep
Light Duty						
6,000 or less	—	—	48,000	—	—	69,100
6,001—10,000	—	—	21,300	—	—	2,000
Medium Duty						
10,001—14,000	—	—	4,400	—	—	—
14,001—16,000	—	—	—	—	—	—
16,001—19,500	—	—	—	—	—	—
Heavy Duty						
19,501—26,000	—	100	42,200	—	500	—
26,001—33,000	—	200	9,000	4,400	3,700	—
33,001 and over	—	1,100	21,200	14,800	20,600	—
Grand Total		1,300	146,100	19,200	24,800	71,200

* Gross Vehicle Weight

Source: Ward's 1969 Automotive Yearbook

manufacturing tends to be less integrated than automobile production, this figure could be considered conservative. In fact, it leads to the conclusion that although the number of trucks produced is small compared with automobiles, there are plenty of sales dollars to be earned by supplying components to truck manufacturers.

In obtaining a share of this big market for the seventies, Canadian firms have two immediate advantages—proximity to the major U.S. purchasing and production centers, and duty-free entry for production components under the Canada-U.S. Automotive Products Trade Agreement of 1965. With these advantages in mind, it becomes evident that, regardless of a Canadian firm's scale of production, there is a segment of the U.S. truck market where its efforts could lead to sales.

In general, light truck components constitute medium- to high-volume requirements similar to automobile components. At the other end of the spectrum are components for heavy trucks that may vary from a few hundred pieces per year on special-order items on up to near-automotive volumes on more universal parts. In general, however, requirements for the heavy-truck segment tend to fall in the low- and medium-volume categories. Hence there is considerable potential here for the smaller Canadian firm that finds automotive volumes too large for its facilities.

GMC Truck and Coach in Pontiac, Michigan, has more than 1,800 suppliers of production parts, 75 per cent of whom are in the "small business" category. And, like all truck manufacturers, GMC is looking for more.

What do the truck manufacturers expect from a supplier? Consistent quality and financial responsibility are the key requirements. Regardless of the volume, quality standards on truck components are becoming more rigorous. Some items are subject to government-imposed safety standards, but almost all aspects of the new vehicles are being upgraded by manufacturers because of more stringent self-imposed reliability and performance standards.

Another trend is the extension of product liability back to the component supplier and the sharing of warranty

costs: factors that make the truck manufacturer anxious to be certain that a supplier is sound, financially and technically.

A supplier's protection and best sales asset is his technical competence. Unlike automobile manufacturers, truck manufacturers, particularly the independents, tend to rely more heavily on suppliers for engineering and design ideas or improvements. Hence, for other than standard items, quality, reliability, engineering, and production capabilities can be the deciding factors in obtaining an opportunity to quote.

Like many manufacturers, GMC Truck and Coach has a formal vendor rating system in which all departments (Purchasing, Engineering, Quality Control, etc.) in contact with the supplier have an opportunity to participate. The purchasing department rates on the following factors, the first three for two points each, the others one, for a total of ten:

1. Price stability
2. Competitive prices
3. Technical and production capabilities
4. Keeps purchasing informed
5. Reacts promptly to requests
6. Labor stability
7. New ideas

Naturally, Purchasing is concerned with price, but it is apparent that the calibre of the firm's sales representative (whether he is a commission agent or company salesman) can shift the balance. The buyer's initial judgment concerning a firm's technical competence, account servicing and reliability about keeping him informed depends on his impression of the sales representative. A representative must also be able to identify opportunities for innovation and sell new ideas to the purchasing staff. In addition, he is a source of commercial intelligence that will help with factors one and two.

What do buyers expect from a supplier's representative? As indicated above, an important function of the representative is to keep the buyer informed, and this covers all aspects of a company's operations that might affect the buyer's firm. Are there labor negotiations or price adjustments pending? Does the representative call ahead to announce his arrival and outline the specific items he wishes to discuss?

It is also important that the representative has a firm idea of the company's production capabilities and doesn't attempt to oversell. Purchase orders are rarely issued without a plant inspection and a buyer who has been misled will distrust any firm that fails to give a realistic appraisal of its capabilities. Many buyers have learned from bitter experience that the truly competent salesman knows what his firm can't do almost as well as what it can.

Where should a representative start making his calls? The truck manufacturers listed in Table 2 are a good place to start. But it should be remembered that, especially in the highly specialized heavy truck area, major sub-component manufacturers—for example, Cummins Engine, Dana, Eaton Yale and Towne, and North American Rockwell—can also be profitable people to call on. These primary automotive suppliers are multi-million-dollar organizations with tremendous buying power. Although they are large firms employing thousands, when it comes to the truck component segment of the business, a Dana buyer summed it up perfectly when he said, "We're just a big job shop."

Thus, the market for truck components is a rapidly growing one that many Canadian firms could enter successfully with existing capabilities. In particular,

These trucks (opposite), ready to roll from Ford's final assembly line at Louisville, Kentucky, are part of the 22 models turned out there. Truck production in the U.S. has almost doubled in the past ten years and manufacturers are on the lookout for parts suppliers of quality products at competitive prices.



a high-ranking truck purchasing official recently named the following commodities for which his firm was particularly interested in developing new Canadian sources:

Production wood parts (hardwood and plywood)

Grey iron castings (low to medium volumes)

Medium and heavy chassis springs (low volume-service)

U-bolts, rolled threads (5/8" and 3/4" diameter)

Large-diameter formed tubing, 4" to 10" (aluminized and welded steel)

Special fittings and fasteners (low volume)

Push-pull control cable assemblies

Low-pressure rubber hose, cotton reinforced.

These are only a few examples of the types of products required. Ford will be stocking more than 20,000 separate part numbers to build its heavy and extra-heavy truck lines in Louisville—the odds are that among these parts, some are suited to the capabilities of a Canadian firm or firms.

The staff of the Detroit Consulate is available for consultation and can help Canadian companies considerably in their marketing effort, whether or not their current customers include truck manufacturers. For any company interested in locating a manufacturers' agent, the Consulate has data cards on over 500 automotive-oriented representatives. If a firm has sufficient sales depth to approach the market directly, the Consulate can suggest an itinerary of calls and can arrange introductions to prime potential customers.

Any firm that feels it possesses the necessary technical capabilities and can meet the quality control and reliability criteria of the truck manufacturers should visit or write to the Detroit Consulate for more detailed information and add a new growth dimension to its sales. Our address is 1920 First Federal Building, 1001 Woodward Avenue, Detroit, Michigan 48226.

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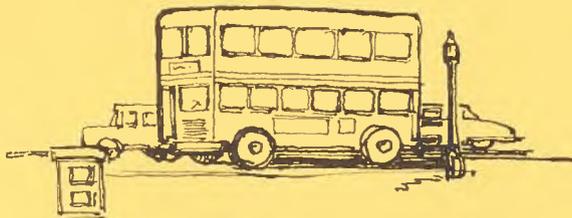
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Massey-Ferguson and the Cassa Co-operate

There's a lesson to learn from the way this multinational company set out to capture markets in the European Economic Community—a lesson from which smaller Canadian firms could profit.

D. S. WRIGHT

Assistant Commercial Secretary, Rome

In July of 1969, as the Prime Minister of Turkey broke ground at the site of two planned Massey-Ferguson plants near Istanbul, an Italian journalist present at the ceremonies sought out Massey President A. A. Thornbrough. He congratulated Mr. Thornbrough on the enterprise of his "British company," whereupon the president remarked that Massey-Ferguson is a Canadian company.

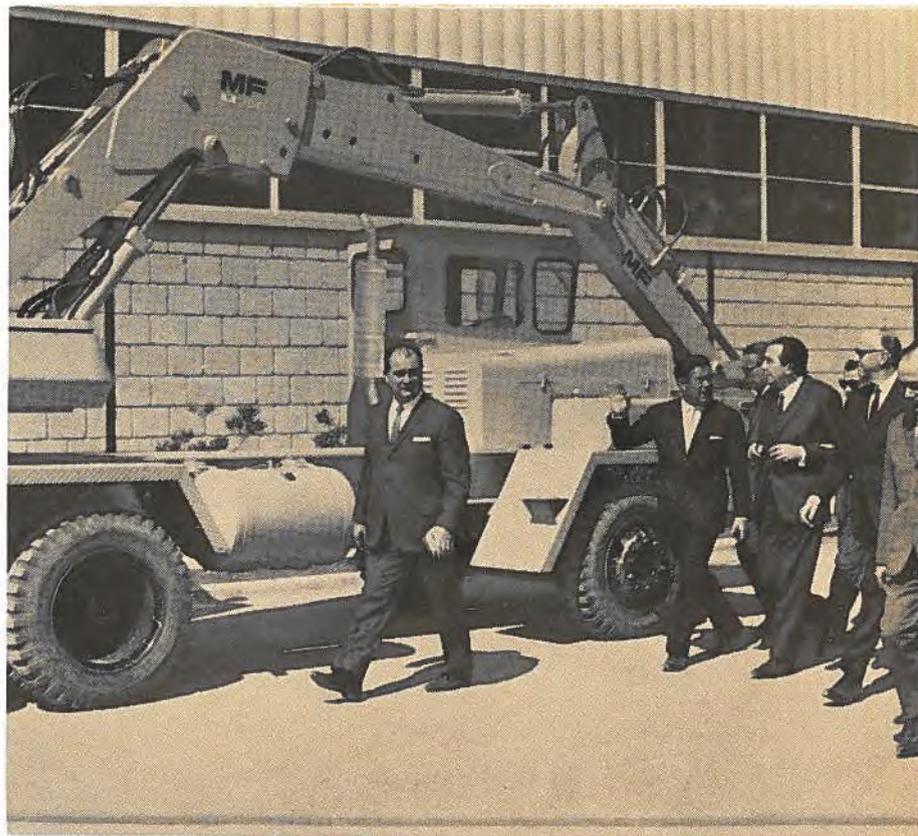
"Of course, I should have known," replied the reporter, "the speech you made was very Canadian."

"That may well be," said Mr. Thornbrough, "but I am an American." The Italian reporter departed, mumbling darkly about the complexities of multinational corporations.

This incident reflects the difficulty of identifying national aspects of multinational firms such as Massey-Ferguson.

Perhaps the same unfortunate Italian reporter did not attend opening ceremonies two years ago for Massey-Ferguson's large new plant in Aprilia, Italy, 60 miles south of Rome. Since the company strives to achieve a local rather than a foreign image in its operations throughout the world, his confusion is understandable.

All multinational corporations have manufacturing facilities outside the home country, and all attempt to integrate their worldwide facilities. Only a few, however, have reached the sophisticated level of internationalism, in which collaborative arrangements between headquarters and subsidiaries are the aim and where the best men are trained for the best jobs



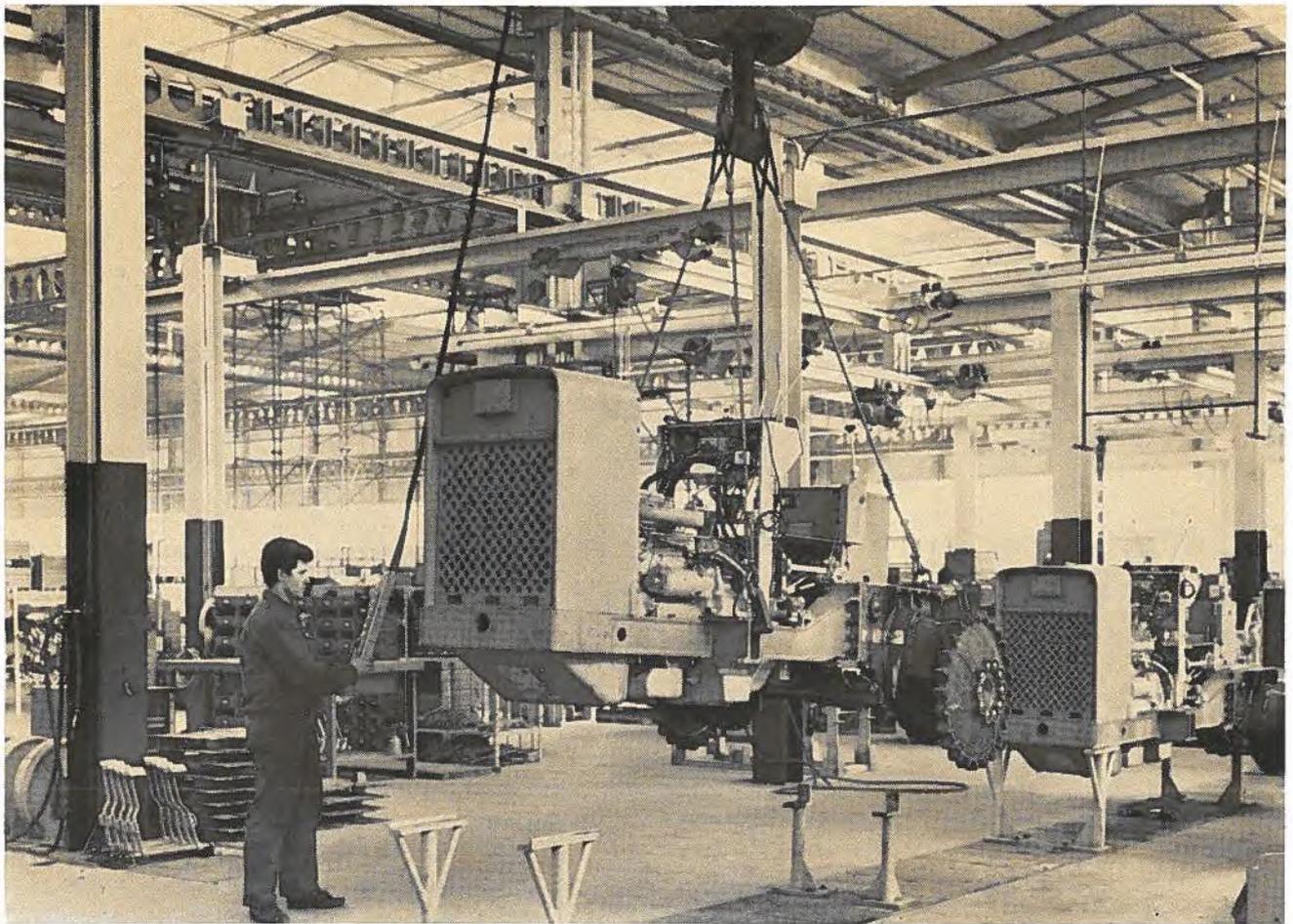
In Aprilia, south of Rome, Dr. Fadda, general manager of MF's Italian operations, (center, hand raised) conducts Italy's Minister of Industry (on his left) and MF president, Albert A. Thornbrough (on the Minister's left) around the factory.

anywhere in the global network. Massey-Ferguson is a good example of this kind of fully integrated multinational corporate structure.

In fact, to identify Massey-Ferguson clearly as a Canadian firm, one must look into its legal make-up and review its history. The firm originated in 1847, when it was founded in Newcastle, Province of Canada West (which later became Ontario). Its head office now is in Toronto. The firm followed the classic route for Canadian international companies: exporting first to

the United States, then to other countries, and finally investing in plant facilities abroad. Massey is at a much more advanced stage of development than most because it has exported for over a century and first invested outside Canada 60 years ago.

The object of this article is to explore Massey-Ferguson's decision to locate a major manufacturing facility in southern Italy, and to examine how this decision made part of a strategic global approach to doing business in Europe and in the world as a whole.



Inside the Massey-Ferguson Aprilia plant, construction and industrial machinery is assembled. The plant, an integral part of the MF global corporate network, produces crawlers, loaders, dozers and excavators for the Italian and world markets.

Massey-Ferguson's direct involvement in Italy began with the purchase, in 1960, of Landini S.p.A., a major Italian manufacturer of agricultural tractors. Landini continues to operate in the same sector, and Massey has gained much more from its acquisition than the registered profits. Technical and engineering expertise, plus a corps of Italian middle and upper management personnel, have proved to be two of the valuable assets included in the Landini purchase.

During the past decade the demand for construction machinery has risen rapidly and by 1965 Massey-Ferguson was looking for a suitable site for manufacturing industrial and construction equipment. Attention focused on Europe, which had become the major market for these products. One of the crucial assumptions in the final decision was that Britain would eventually

join the EEC, and that more broadly based European economic integration was inevitable.

It was apparent that, because of the Landini expertise that had been acquired in 1960, and with comparative cost structures in Europe as they were, Italy was an attractive location. The element that assured a decision in favor of Italy was the extensive investment incentive program sponsored by the Government for the southern portion of the country, "il Mezzogiorno". (See "Southern Italy Welcomes Investors", *Foreign Trade*, June 21, 1969.)

Once it became clear that Italy satisfied the basic requirements for manufacturing of industrial and construction material, the incentives offered by the Cassa per il Mezzogiorno (Fund for the Development of Southern Italy) were dominant in the location decision.

The incentive package was impressive. Most important was a ten-year tax holiday (Italian corporate taxes amount to 50 per cent of profits). Financing of all aspects of the initial investment was provided to a great extent by Cassa funds, or by Cassa-subsidized loans from the Istituto Mobiliare Italiano (IMI), a development financing agency. It is difficult to evaluate this financial assistance on a simple present-value basis, as a portion of the funds provided in grant form was tied to the purchase of equipment from southern Italy. To give a general idea, however, one might say that the Italian Government through its various agencies gave from 15 to 20 per cent of the initial investment in the form of grants and provided low-interest loans to cover another 50 to 60 per cent of expenditures for the early phases of development.

Thus the outlay from Massey-Ferguson's internally generated funds was a small portion of the total initial investment. The Cassa provides financing, often through IMI loans, based on the probable effect of the proposed enterprise on employment and economic wellbeing in depressed areas. Since it was anticipated that Massey-Ferguson would generate many jobs (the plant now employs 1,700 people), the Cassa looked with particular favor on the Aprilia plant.

Transportation was a major concern. Of the major Italian ports, Genoa in the north is very congested. Livorno and Naples in south-central Italy are freer, and plans for their extensive development are progressing. Since Massey-Ferguson wished good access to a seaport, central Italy offered more than the north. Rail shipping to the rest of Europe is more expensive from southern Italy, but again the Cassa stepped in and offered subsidized rail shipping rates, more or less equalizing costs with shipments being made from northern Italy to other European countries. Aprilia was attractive in that a link to the north was promised and it is about equidistant from Naples and Livorno.

The labor supply was much tighter in northern than in southern Italy, and with an intensive training program for workers (again paid for in part by Cassa funds) traditional fears about supposed southern Italian inefficiency were dispelled. An indication of the kind of efficiency and industriousness experienced by Massey-Ferguson is the time that elapsed between the breaking of ground and the beginning of production: 14 months.

It is stressed that established markets are a basic requirement for such a far-reaching enterprise as that undertaken by Massey-Ferguson in Aprilia. Even so, performance since operations began in 1968 has been very favorable, particularly for a new production unit. In 1968, sales from the Aprilia operation amounted to \$30 million and profits \$1 million. In 1969 these figures increased to \$50 million and \$1.7 million, respectively. Clearly, Massey-Ferguson has benefited considerably from Cassa incentives, just as the Cassa objective of creating employment opportunities has been satisfied.

The Aprilia plant has taken its place as a crucial part of Massey-Ferguson's global corporate network. The production line includes crawlers, loaders, dozers and excavators, and production of these units for the company is largely concentrated in Aprilia. Thus the market served from Aprilia is world-wide.

Plans for the future include penetration of new markets in the industrial and commercial machinery field (particularly those in Latin America) by supplying from Aprilia disassembled units. These often receive more favorable tariff treatment than the finished product and are more acceptable imports in countries where visible industrial growth is a high priority.

Aprilia will be given a large degree of autonomy by corporate headquarters in Canada, enabling the Italian man-

agement to respond rapidly to changing conditions, and to pursue growth and profit objectives independently.

Management of Canadian industrial concerns smaller than Massey-Ferguson may draw some conclusions from this case study. If a firm with a significant market in Europe wishes to enlarge it but has doubts about its ability to penetrate an expanding and consolidating European Common Market from without, then supplying the EEC from within may be the answer. Massey-Ferguson has followed this classic route. It has found the EEC a huge and lucrative market, and has decided that originating some products in southern Italy constitutes an optimal strategy. There may be a lesson in this for a number of other large Canadian firms. Perhaps southern Italy and the Cassa will play a significant role in the future decisions of Canadian industrialists.

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Swiss Industry Needs Non-Ferrous Metals

To feed plants turning out semi-finished and finished products, the Swiss are steady customers for copper, nickel, lead and tin. Canadian producers must compete with European suppliers; need active representatives.

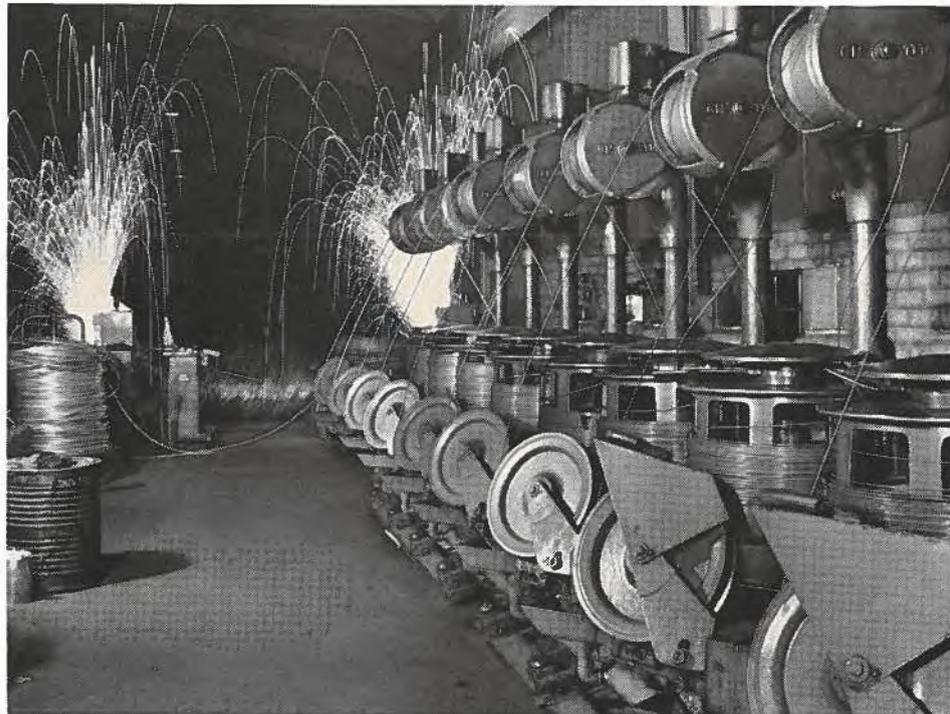
MAX MEISTER, Commercial Officer, Berne

Switzerland ranks among the most highly industrialized countries of the world, with over 50 per cent of the working population employed in industry. As a result, the processing of metals plays a vital role. Metal consumption—sharply increased, especially since the Second World War—is very high. The expansion has been particularly marked in non-ferrous metals, although iron and steel still lead the list of metals consumed. Swiss industry depends entirely on imported non-ferrous metals, of which the most important are copper, nickel, lead, zinc and tin.

Three distinct groups of factories use non-ferrous metals to produce semi-finished and finished products.

1. The so-called "Metallwerke" (Metal Works) which use primary metal and scrap to produce semi-finished products of copper, brass, cupronickel, argentan and bronze in the form of sheets, strips, rods, profiles and tubes. There are three of these in Switzerland: Schweizerische Metallwerke Selve & Co. located in Thun some 30 kilometers south of Berne, Boillat S.A. at Reconvilier, in the northwestern part of the country, and Metallwerke AG at Dornach, near Basel.

These companies are loosely connected in the Metallverband AG, Berne, which acts as their sales and publicity office. In addition to the products mentioned above, Schweizerische Metallwerke Selve & Co. manufacture copper wire which is either sold in the semi-finished stage to wire and cable factories for further processing, or used in Selve's own plant to produce finished electrical



A Swiss factory makes copper wire, with an effect like giant roman candles. The four metal and wire works are the biggest copper consumers and have some difficulty keeping production up to demand. They also use copper scrap.

wire. Copper tubing is manufactured by the Metallwerke AG in Dornach, and Boillat S.A. concentrates on semi-finished goods made of brass, in which a large percentage of scrap metal can be used.

The semi-manufactured products of the three companies are sold for further processing to the following Swiss industries in the percentages indicated:

Machinery and apparatus	18
Electrical industry	14
Consumer goods	12
Construction industry	10

Transport, ammunition, coins	9
Watch industry	16
Fittings	7
Export	14

2. The wire and cable factories. Apart from Schweizerisch Metallwerke Selve & Co. in Thun there is only one other Swiss wire factory, S. A. des Cableries et Trefileries de Cossonay, near Lausanne. Both companies produce electrical wire for power lines, railways and trolley buses. They also supply the insulated wire works and the cable factories with semi-finished wire. S.A. des Cableries et Trefileries de Cossonay

manufactures insulated wire and cable as well.

The insulated wire factories reduce wire to smaller dimensions and add an insulation of paper, rubber, plastic or lacquer. S.A. des Calberies et Trefileries de Cossonay has already been mentioned and there are five other insulated wire works:

Schweizerische Isola-Werke AG at Breitenbach, near Basel

Suhner & Co. AG, at Herisau, in the eastern part of Switzerland, Aktiengesellschaft R. & E. Huber at Pfaffikon, in the Zurich region

Kupferdraht-Isolierwerk AG, at Wildegg, between Berne and Zurich

Schweizerische Draht-, Gummi and Kunststoffwerke Datwyler AG, at Altdorf, south of Lucerne.

The last-named also manufactures cables.

The cable factories use copper wire in making heavy electrical cables with a protective coating of lead or plastic material. Cables are manufactured by the above-mentioned companies in Cossonay and Altdorf as well as by Societe d'Exploitation des Cables Electriques, Cortaillod, north of Lausanne, and Kabelwerk Brugg AG, Brugg, some 30 kilometers northwest of Zurich.

Of all the wire and cable factories, only Schweizerische Metallwerke Selve & Co. and S.A. des Calberies et Trefileries import and process primary metal. They supply all the other works with copper wire, but some of these wire requirements are covered by imports.

3. Metal foundries. There are about 60 metal foundries of rather limited importance. They use mainly scrap metal for fittings, taps, valves, toys, etc.

How big is the Swiss market for the various non-ferrous metals?

Copper—Switzerland does not publish consumption statistics but according to estimates, copper consumption in 1968 amounted to about 35,200 metric tons or roughly 22 pounds per capita. The largest consumers are the metal and

wire works in Thun, Cossonay, Dornach and Reconvilier. Apart from smelter copper, these works use large quantities of scrap from their own production and from that of their customers. Imports in 1968 and 1969 and imports from Canada (Swiss statistics) are given in Table 1.

For the last two years the production capacity of the three "Metallwerke" has been practically fully utilized and the works have had difficulty keeping up with demand. As a consequence, Switzerland imports increasing quantities of semi-manufactured copper products, particularly copper wire. In 1969 these imports amounted to 26,769 metric tons compared with 21,927 in 1968. Probably because of short supplies, Canada's share of the Swiss market for copper was limited. The main suppliers of primary copper are Belgium, Zambia, West Germany, the United States, and Chile. Semi-manufactured products come mainly from European countries. An outstanding supplier of copper wire is Britain.

The Swiss non-ferrous metals industry supplies not only the Swiss but also foreign markets. It even re-exports some smelter copper to European countries and ships semi-manufactured copper products all over the world. Table 1 gives exports for 1968 and 1969.

Nickel—In 1969, Switzerland imported 2,180 m. tons of primary nickel, 119 of nickel machining waste and scrap, and 1,279 of bars, wire, sheets, pipe, powder, and anodes. The corresponding figures for 1968 were 1,557 m. tons, 73, and 963. Canada's share (all primary nickel and powder) was 170 tons in 1969 and 79 in 1968. The main supplier was Britain, but it should be noted that Canadian nickel is shipped to Switzerland from INCO operations in England. Other important suppliers were Belgium, Norway and West Germany.

Swiss exports amounted to 1,958 tons in 1968 and 2,638 in 1969. The largest export item was machining waste and scrap sold to West Germany.

The International Nickel Co. of Canada Ltd. and Falconbridge Nickel Mines Ltd. have sales agents in Switzerland. Furthermore, INCO maintains a technical bureau in Zurich which advises Swiss industry and research laborato-

ries on the properties of some 3,000 nickel alloys. The Bureau is also concerned with market development for nickel and with the study of new applications for this metal.

Lead—Lead is used in particular by storage battery plants, cable and paint factories. Imports in 1969 were (with 1968 figures in brackets) 25,965 m. tons of primary lead (20,223); 25 of lead machining waste and scrap (43); 771 of bars, sheets, pipe, power (595).

In 1969, Canada shipped 2,506 tons of primary lead (1968: 4,166). A shortage of lead in Canada in 1969 meant that exports to Switzerland dropped considerably. The main suppliers were West Germany, France, Belgium, Peru, and North Korea, followed by Canada in sixth place.

Swiss exports amounted to 6,135 m. tons in 1968 and 8,748 tons in 1969. Here again, machining waste and scrap (8,367 tons in 1969) practically accounted for the total. The main customer was Italy.

Zinc—Zinc is processed primarily by the "Metallwerke", metal foundries, die-casting plants and cold-galvanizing factories. Imports in 1969 were (1968 figures in brackets): primary zinc 31,057 m. tons (25,809); zinc machining waste

TABLE 1
SWISS TRADE IN COPPER

	Metric tons	
	1968	1969
Imports from the World		
Smelter copper, pure	37,411	37,948
Smelter copper, alloyed	1,122	3,231
Copper machining waste	295	345
Copper scrap	343	167
Imports from Canada		
Smelter copper, pure	1,230	1,023
Copper scrap	133	48
Copper wire, pure	2,573	2,497
Copper plates, alloyed	—	361
Exports		
Smelter copper, pure	2,224	637
Smelter copper, alloyed	4,237	3,410
Copper machining waste	4,882	5,837
Copper scrap	7,900	12,108
Bars, wire, sheets, plates, strips	9,584	9,082

and scrap 1 (1); bars, wire, sheets, pipe, powder 5,273 (4,583).

Canada shipped only 612 tons of primary zinc in 1968 and 306 tons in 1969. Belgium, West Germany, North Korea, Zambia and Romania are the leading supplying countries.

Switzerland exported 1,731 tons of zinc in 1968 and 1,775 tons in 1969, of which 1,452 tons consisted of machining waste and scrap sold mainly to Italy.

Tin—Tin is the least important of the non-ferrous metals considered in this study. Imports in metric tons in 1969 were primary tin 928 (883); bars, wire, soldering tin, plates, powder 156 (112).

There were no imports from Canada. The main supplying countries were the Netherlands, Britain, Malaysia and Indonesia.

Swiss exports amounted to 167 tons in 1968 and 240 tons in 1969; of this, 156 tons were machining waste and scrap sold to France and West Germany.

Non-ferrous metals are purchased on the basis of long-term contracts which are usually concluded with the producers' agents in Switzerland and other European countries. Trading in copper, lead, zinc and tin is also done through

brokers at the London Metals Exchange, where official prices are determined and where sales can be made from stocks. Nickel is not an "Exchange" metal.

There are roughly four groups of non-ferrous metal importers in Switzerland:

(a) The three "Metallwerke" which import primary metal direct, through agents and importers.

(b) Importers of primary metal who supply the "Metallwerke", the large machinery companies, and metal foundries.

(c) Machinery companies and the Swiss Federal Mint. They import primary metal which is turned over to the Swiss "Metallwerke" for processing. These companies also deal with importers.

(d) Importers of semi-finished products, such as wire and tubes, which are sold to Swiss industries and craftsmen.

The market for primary metal is rather inelastic because the production capacity of the processing works is practically fully utilized. For this reason, sales possibilities for imported semi-finished products look more promising. Swiss factories are using increasing quantities of semi-finished non-ferrous products of all types and if the supply

situation in Canada improves, exports to Switzerland could be increased considerably.

There are, however, some obstacles. Swiss importers seem to prefer to deal with European suppliers because the transport of goods within Europe is cheaper and faster than from overseas countries. Deliveries can be made by truck or container from the factory to the customer's plant. Personal contacts by visits and telephone are easier. Last but not least, Switzerland's EFTA partners enjoy a duty advantage, and this favors particularly the British metal industry. To overcome these handicaps, Canadian producers of primary metal as well as of semi-finished products need agents in Switzerland, or this market should be covered by their representatives in other European countries who should call regularly on Swiss factories and importers. Stocks should be kept in warehouses on the continent to guarantee fast deliveries. For example, a company that sells to Germany could warehouse stocks there and ship them by barge up the Rhine to Basel. Furthermore, the Swiss are particularly concerned about the continuity of supplies even in times of stress on the metal markets.

Switzerland has no import restrictions or quotas on non-ferrous metals, and because the market is wide open, competition is bound to increase as new production facilities are built in various parts of the world. It would certainly be worthwhile for Canadian companies to have a closer look at the Swiss market now. The Commercial Division of the Canadian Embassy, Kirchenfeldstrasse 88, Berne, will be pleased to assist them in establishing new business relations.



Like oversize egg cartons, copper bars (foreground) make up part of the metal stock held in one of the three large "Metallwerke". In 1969 Switzerland imported 135,100 tons of raw and semi-finished non-ferrous metals. There are no import restrictions or quotas on these products; the most important ones bought abroad are copper, nickel, lead, zinc and tin.

Denmark Spends on Hospitals

The 18,000 beds planned for hospitals in Denmark during the next 15 years mean a market worth over one billion dollars. High quality is key to successful equipment sales.

MRS. J. NEERGAARD
Commercial Officer, Copenhagen

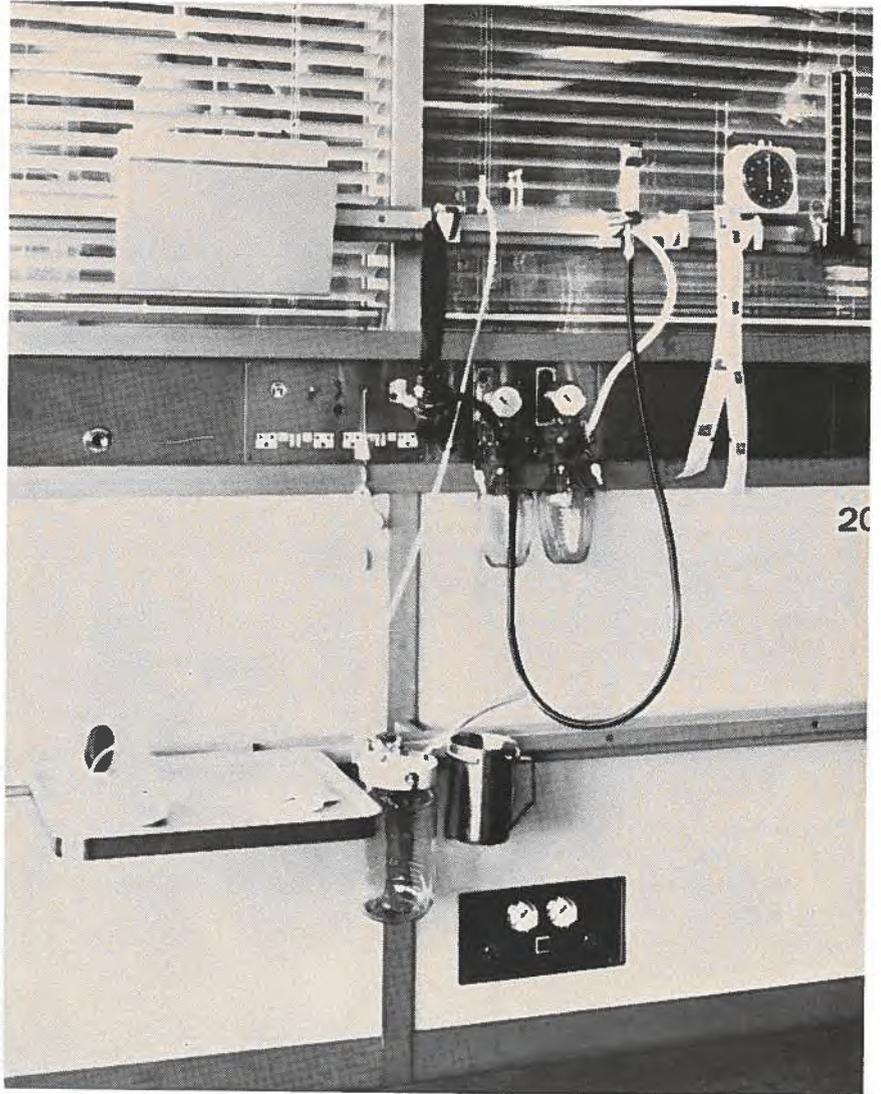
Denmark, with its population of only about five million, spends as much as 27 per cent of its total budget on public health. The Danish Hospital and Health Insurance Scheme provides full national coverage, and high standards of the medical profession have brought about the demand for the best quality in medical and hospital materials and equipment.

The majority of Danish imports come from Sweden and Germany. The two countries supply almost all surgical instruments, and the United States, which excels in anaesthetic and electronic equipment. Denmark itself produces advanced electronic products and here small Danish firms sometimes have the advantage over larger foreign companies because they are better able to adapt their production programs to meet local requirements.

Other areas in which Denmark's own production is strong are blood analysis equipment, hearing aids and monitoring equipment. It also has an active pharmaceutical manufacturing industry. One of the areas of opportunity is disposables, such as plastics and non-wovens, gloves and syringes. Freight on these lower-cost articles is relatively high, however, and this may be a field where Canadian manufacturers might possibly consider production under licence in this country.

As the statistics show, Canada's share of the Danish market is negligible compared with that of the United States. One of the reasons may be that many Danish doctors do specialized postgraduate work in the United States and become familiar with highly specialized American equipment.

Danish customs duties on medical and surgical equipment are low, seldom exceeding 3.5 per cent ad valorem,



At the National Hospital in Copenhagen 8 per cent of the beds are connected to a monitored intensive-care unit, where a wall rail system (above) allows easy interchange of equipment, such as oxygen therapy units and blood pressure manometers.

so the fact that imports of this type of equipment from EFTA countries (such as Sweden) enter free does not present a serious competitive factor. Competition centers in the equipment itself, its quality, function and reliability, which must meet the highest standards. Price can then be of secondary importance. The servicing of sophisticated equipment presents no

difficulty because Danish importers of hospital and medical equipment have highly-trained technical staffs.

Sterilization of equipment is advanced in Denmark. Atomic Energy of Canada Limited in 1969 sold a \$150,000 Cobalt 60 radiation sterilization plant to a Danish company. Sterilization by the etulin-oxide method is not accepted.

The Danish Government recently started a 15-year program of hospital modernization. This provides an excellent opportunity for Canadian manufacturers of advanced and sophisticated medical and hospital equipment to share in an expanding market.

In 1966 there were 134 general hospitals in Denmark, with a total of 28,800 beds. By 1985, it is estimated, 37,000 hospital beds will be needed. If these estimates are correct, new hospitals must be built with a total of 8,000 beds. In addition, the health authorities consider that at least 10,000 of the existing beds should be renewed in the near future. This means a total for the period until 1985 of 18,000 beds. Measured by 1968 prices, the cost of a new hospital bed is estimated at \$71,000, so the total investment will be \$1,285 million for this period.

At present, 21 of the existing hospitals are in the greater Copenhagen area. Denmark's largest hospital, now being rebuilt, will be one of the world's most advanced. The first and largest 17-floor block is already finished and the entire project of 2,100 beds, requiring a staff of 4,500, is expected to be completed by 1978/79. This hospital alone is expected to cost \$93 million and equipment costing \$50 million will have been purchased by then.

There is no central hospital purchasing organization in Denmark, although there is a tendency towards centralization. The larger hospitals fear that the money saved through centralized bulk buying would be less than the additional storage and transportation charges. Some of the smaller provincial hospitals, however, have begun co-operative buying. In addition, several of the hospitals in the greater Copenhagen area are experimenting with joint purchases of standard consumer items in an attempt to minimize administration costs. There is little doubt that this co-operation will gradually come to include all consumer purchasing within hospitals in the individual provinces. Purchase of capital equipment will, however, continue to be based on individual requirements.

At the National Hospital there are separate purchasing sections for linen, food and kitchen utensils, chemicals, and pharmaceuticals. The purchasing

department, assisted by a utensil committee and an equipment committee, administers all other purchases. This department is responsible for buying all equipment, furniture and medical consumer items. Great emphasis is laid on a system that frees medical and nursing personnel from daily requisitioning and purchasing requirements.

The hospital has recently standardized all consumer items, its new furniture—which it designed itself—and, to facilitate servicing, as much of its equipment as possible. Other hospitals have expressed considerable interest in this rationalization and they may follow suit.

The purchasing department is responsible for updating its purchases, following the development of new products through technical and scientific magazines, attendance at medical exhibitions, and meetings with the many representatives of both Danish and foreign firms. Specialized exhibitions, such as those organized in connection with international medical congresses, are considered to be the most useful.

Products are collected, examined and compared impartially, regardless of origin, at meetings between the purchasing department and the utensil committee. If a product is considered suitable, it then goes into the hospital's departments for stringent testing. The

hospital constantly makes random tests of all its equipment. If the tests prove satisfactory, the product is then placed on its standard lists.

The senior doctor in each department completes a requisition form annually for the capital equipment required by his department. These requisitions go to the powerful purchasing department which, in co-operation with the hospital equipment committee, determines priorities of departmental requirements and arranges procurement geared to the funds available.

The office of the Commercial Counsellor of the Canadian Embassy in Copenhagen is ready to help any Canadian manufacturer who wants to explore market possibilities for his products. Manufacturers are invited to send several sets of well-illustrated technical literature and c.i.f. Copenhagen prices to the Commercial Counsellor, who will assess and report on the market possibilities.

Once preliminary interest has been established, it will be necessary to send a technically qualified representative to undertake detailed discussions with potential importer/distributors and with hospital doctors and officials. It can be a long process, but it could be well worthwhile. The Commercial Counsellor and his staff will be glad to offer their assistance.

DENMARK'S TRADE IN HOSPITAL EQUIPMENT

Item	Cdn \$'000 Imports		Exports	
	1968	1969	1968	1969
Diagnosis registration equipment	228	262	1,398	1,626
Equipment for infra-red and ultra-violet ray treatment	364	398	15	18
Other electrical medical equipment	—	—	—	—
Other medical instruments incl. hypodermic needles, injection sprays, catheters, etc.	5,496	6,727	3,790	4,129
Equipment for massage, psychotechnical examinations, oxygen, ozone and aerosol therapy, and all respirative equipment	507	661	1,267	1,586
Hearing aids	38	45	5,261	6,616
Orthopedic articles	962	1,285	16	133
All X-ray equipment	2,935	3,136	1,819	2,065
Medical/surgical furniture	844	738	99	121
Total	11,374	13,251	13,665	16,294
Canada's share of total trade	5	27		
U.S.'s share of total trade	2,048	1,904		

Trade Commissioners on Tour

In Territory

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

Bulgaria, Hungary, Rumania

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

Cyprus

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

Finland

A Trade Commissioner from the Stockholm, Sweden, office visits Helsinki once a month for about a week, except during July and August.

Ireland

R. A. Bull, Commercial Counsellor in Dublin, will visit Galway and Sligo January 20-22.

Dominican Republic, Haiti, Virgin Islands

Trade Commissioners from San Juan regularly visit the Dominican Republic, Haiti and the Virgin Islands. Canadian businessmen who would like officers to undertake assignments for them in these countries are invited to write to the Canadian Consulate.

Guyana, Surinam, Trinidad

Officers of the Port-of-Spain, Trinidad, office will make visits as follows: Guyana and Surinam—D. J. McJanet, Assistant Commercial Secretary, January 4-10.

Guyana—J. A. Ahow, Commercial Officer, February 8-12; J. M. C. Lavoie, Assistant Commercial Secretary, March 15-19.

South Trinidad—D. Hobson-Garcia, Commercial Officer, January 13; J. A. Ahow, Commercial Officer, March 10.

Turkey

Trade Commissioners in Ankara visit Istanbul frequently. Canadian businessmen who would like the officers to undertake assignments for them in that city are invited to write to the Commercial Division, Canadian Embassy, Vali Dr. Resit Caddesi 52, Cankaya, Ankara, Turkey.

Trade Lines

New ports for Singapore

The Asian Development Bank (ADB) is studying a \$5.6-million development of Pulau Chir Chir, an island at the mouth of the Jurong River, as a wharf site to increase the capacity of the Jurong industrial estate. Other plans include the construction of a 600-foot deep-water wharf at the port of Taman Jurong and the extension by 465 feet of two berths at the deep-water wharf in Jurong. Also scheduled for construction is a \$263,025 warehouse at the Jurong wharf and a \$1.05 million causeway linking Damar Darat and Pulau Damar Laut—Singapore

Plutonium fuel in Belgium

A plant for the production of plutoniferous fuel will be built near Mol, Belgium, by S.A. Belgonucleaire of Brussels. The plant, to cost more than \$4 million, is scheduled to begin operations in 1972. Belgonucleaire has much experience in the use of plutonium in nuclear reactors; it has supplied plutonium-enriched fuel elements for the BR3 reactor at Mol, and the plutoniferous fuel rods for the Garigliano power station in Italy—Brussels

Singapore buys sporting goods

Sporting goods dealers in Singapore are enjoying a minor boom, because of the number of sports being promoted there. But because the home market is so limited, it is not expected that local manufacture of sporting goods will become profitable. Total value of sporting goods imported was \$2.03 million in 1969 as against \$1.6 million in 1968. Singapore re-exported sporting goods worth \$666,330 to neighboring countries, such as Malaysia and Indonesia. Schools are spending up to 35 per cent of their funds on sports—Singapore

Scottish company plans \$22-million tourist center

A tourist center is being planned for a 400-acre site at Strathblane, some 15 miles north of Glasgow. It will be financed by a newly formed company headed jointly by the chairman of the House of Fraser and John Lawrence of the building company, John Lawrence (Glasgow) Ltd. When completed, the complex will include a first-class golf course, built specially for international matches and television coverage, pony trekking, a swimming pool, a dome-shaped conference hall

to seat 1,000 persons, hotels, a fishing loch and an artificial ski slope with chairlift. The center is expected to be in operation by 1974-75 and the money to finance the project will be raised in Scotland, London and the United States—Glasgow

New zinc-producing complex for Mexico

Construction of a \$500-million zinc-producing complex in the mining area of Torreon, Coahuila, Mexico, will begin shortly. Scheduled to go into operation early in 1973, annual production capacity will be 105,000 tons of refined zinc, 200,000 tons of sulphuric acid, and quantities of silver, copper, cadmium and other metals—Mexico, D.F.

More power for Texas

Construction has begun at Lake Lyndon B. Johnson, Texas, of the \$40-million Granite Shoals gas-fired, steam-electric generating plant. It will have a generating capacity of 440,000 kilowatts when it is completed in 1974. The power plant will be built by the Lower Colorado River Authority—Dallas

Canadian wood pulp for Colombia

Celanese Colombiana S.A. of Colombia will increase its purchases of Canadian wood pulp upon completion of a \$4.3-million extension, now under way at its plant in Cali. The plant uses the pulp in the manufacture of cellulose acetate yarns, rolls of lint for cigarette filters, polyester fiber and other similar materials—Bogota

West German trade shows surplus

The Federal Republic's balance of trade for the first half of 1970 shows an export surplus of \$1,770 million, slightly less than in the same period in 1969. Imports January-June totalled \$15,088 million compared with total exports of \$16,861 million, increases of 13 and 11 per cent, respectively, over last year's totals. Allowing for changes in the price level, the real growth rates were higher for imports and lower for exports. Compared with prices in June 1969, import prices in June 1970 were 2.5 per cent lower and export prices 4.8 per cent higher—Duesseldorf

Siemens looks east

Increased co-operation with the Eastern European countries ranks high on the priority list of Siemens, West Germany's largest engineering firm. A special department for trade with these countries has already landed contracts valued at \$13.5 million from East Germany, the Soviet Union, Czechoslovakia, Hungary, and Rumania. Talks aimed at co-operation with the U.S.S.R. in the field of electronic data processing have been launched. Siemens obviously wants East European business to become a major share of its expected rise in orders this year to \$200 million (1969, \$109 million). The foreign share of these totals is about 30 per cent—Bonn

Mexican mining operations

Extraction of iron ore has begun at the \$4.6-million mining complex of Cia. Minera del Norte, S.A., an affiliate of Cia. Fundidora de Fierro y Acero de Monterrey, S.A. Another affiliate, Cia. Hulera Mexicana, S.A., has started metallurgical coke-producing operations at 60,000 metric tons per month, to replace part of the 250,000 tons per year that Fundidora now imports. The two operations are in the State of Coahuila—Mexico D.F.

West Germany's agricultural exports up

West German agricultural exports in the first six months of 1970 amounted to \$561.6 million, a 31.4 per cent increase over the \$427.3 million earned in the same period of 1969. According to the German Federal Bureau of Statistics, the value of exports in the six months, with the 1969 figures in brackets, break down as follows: live animals, \$61.8 million (\$43 million); food of animal origin, \$176.9 million (\$152.2 million); food of plant origin \$269.6 million (\$189.1 million); luxury goods (except coffee and tobacco) \$53.2 million (\$42.8 million). By contrast agricultural imports, although they were up by 1.7 per cent, decreased from 20.6 to 18.5 per cent as a part of total imports—Bonn

U.S.S.R. orders chipboard plants

The Soviet purchasing agency Prommarshimport has placed an order with Rauma-Repola Oy of Finland for six complete chipboard plants. The order, for about Cdn.\$19 million worth of equipment, will be delivered over the period 1972-73—Stockholm

Foreign Tariffs and Trade Regulations

Argentina

The Central Bank of Argentina has announced normalization of the exchange market, effective December 3, 1970. Exchange transactions may now be carried out according to the regulations as they existed prior to October 14 when the exchange market was closed. However, certain restrictions still remain in force. Exchange transactions must all be carried out through the banks. Central Bank authorization will still be required for sale of foreign exchange connected with investment or placing of foreign exchange in deposit accounts in Argentina or abroad. Certificates will also be required for remittance of profits, dividends or loan repayments.

South Africa's Automotive Industry

South Africa's automotive industry has developed into an important segment of the country's economy. It has also continued to be important as one of Canada's major markets for automobiles and components, accounting for from 23 to 33 per cent of our total exports to South Africa in recent years.

Production of motor cars has expanded greatly. From a small start in the mid-1920's, when sales totalled only 19,151 units, they reached 256,296 units in 1969 (a gain of 21 per cent over 1968) consisting of 177,945 passenger cars and 78,351 commercial vehicles.

Sixteen companies produce motor vehicles here, all subsidiaries of, or closely allied with, the major U.S., British, European and Japanese manufacturers. They produce more than 40 marques with about 140 variants. The largest are Ford, General Motors, Volkswagen and Chrysler. The Japanese have made great strides in the commercial vehicles sector, and their sales

of 22,237 units in 1969 accounted for 28.4 per cent of the market. Since 1962 the Government has been carrying out a program to raise the local content of passenger vehicles. Under phase three of the program, local content of passenger cars must reach 66 per cent by December 31, 1976, from the present 52 per cent.

In 1967 Canada exported \$17.3 million worth of automotive vehicles and components to this market. In 1968 these shipments rose to \$23 million, in 1969 they dropped to \$18 million, and to the end of September 1970 rose again to \$23.8 million. On the average, Canada has enjoyed about 5 per cent of the market for vehicles and components. Imports of passenger cars from Canada dropped in value from \$12 million in 1968 to \$7 million in 1969, and of commercial vehicles from \$6.6 million to \$5.5 million.

This down-trend reflects the movement toward more local content and the increasing demand for smaller vehicles,

plus the fact that Canadian manufacturers are abandoning the costly operation of making right-hand-drive cars. The demand for Canadian commercial vehicles of a certain size is expected to remain at present levels unless Canadian manufacturers stop making them with right-hand drive or South Africa introduces a local content program for commercial vehicles. The general consensus on this latter point, however, is that it will be a long time coming.

It is estimated that there are some 200 firms in South Africa supplying \$250 million worth of components to the industry. Many of these firms are small and the large well-known international manufacturers have subsidiary operations or manufacturing arrangements with local firms. Nevertheless, highly sophisticated electrical components, eight-cylinder engines, certain types of transmissions, and various other special components still must come from abroad.

The large partnerships between overseas specialists in components and South African capital and labor are almost entirely long-term enterprises. As the phase three program progresses, the demand for imported finished components will continue to decline. There are, however, opportunities for Canadian manufacturers in this market, particularly for manufacture under licence or for joint ventures.

There is also an expanding market for accessories. There are about 150 wholesaler-importers in this sector of the industry, with a turnover placed at \$9 million a year. Many items are produced locally but there are large imports of accessories, mainly from Europe, Japan and Hong Kong. Opportunities for accessories from Canada are not great, but Canadian manufacturers of specialty items or products newly introduced to the market may find some interest among South Africans. And there is always a demand for various types of service equipment but prices must be competitive to interest local firms.

Canadian manufacturers of components, accessories and automotive service equipment should not hesitate to contact the Canadian Trade Commissioner, P.O. Box 61619, Marshalltown, Johannesburg, and P.O. Box 683, Cape Town, South Africa, for assistance in developing sales to this market, or for more information on it.

W. D. WALLACE
Trade Commissioner, Cape Town

RETAIL SALES OF CARS AND COMMERCIAL VEHICLES 1969

			Units Cars	Commer- cial
Car Distributors Assembly (Pty) Ltd			6,951	2,069
Chrysler South Africa (Pty) Ltd	Valiant	14,762		
	Arrow	5,226		
	Other	730	20,718	1,968
Daihatsu South Africa (Pty) Ltd			152	852
Fiat South Africa (Pty) Ltd			9,967	253
Ford Motor Co of South Africa (Pty) Ltd			37,831	11,645
General Motors South Africa (Pty) Ltd			31,701	11,316
International Harvester Co S.A. Ltd				1,404
Leyland Motor Corporation of S.A. Ltd				
	Austin/Morris	Wolseley	9,206	
		Triumph	3,377	
		Rover	292	
		Jaguar	530	13,405
				5,437
Meyer & Hiller (Pty) Ltd				392
Motor Assemblies Ltd	Toyota	5,496		
	Volvo	4,187		
	Rambler	2,419	12,102	22,237
National Motor Assemblies Ltd (Peugeot)	Citroen	729		
	Peugeot	7,722	8,451	1,898
Praetor Assemblers (Pty) Ltd	Jeep	59		
	Colt	685	744	282
Rossllyn Motor Assemblers (Pty) Ltd	Datsun	4,361		
	Renault	3,461		
	Alfa Romeo	1,844		
	BMW	1,090	10,756	9,747
Volkswagen of South Africa Ltd			25,107	8,404
Other makes			60	449
Total			177,945	78,351

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 .97.*

To convert column two, *divide by .97.*

Country and Currency	Value of		Country and Currency	Value of	
	foreign currency unit in Canadian dollars at December 11	Canadian dollar in foreign currency units		foreign currency unit in Canadian dollars at December 11	Canadian dollar in foreign currency units
Algeria Dinar	.1862	5.37	Dominican Republic Peso	1.0209	.97
Argentina Peso (free)	.2552	3.91	Ecuador Sucre (official)	.04084	24.48
Australia Dollar	1.1386	.87	El Salvador Colon	.4084	2.44
Austria Schilling	.03952	25.30	Fiji Dollar	1.1786	.84
Bahamas Dollar	1.0209	.97	Finland Markka	.2431	4.11
Belgium and Luxembourg Franc	.02056	48.63	France, Monaco, etc. ² Franc	.1848	5.41
Bermuda Dollar	1.027	.97	Franco-African Republics ³ Franc	.003696	270.56
Bolivia Peso	.08576	11.66	French Pacific ⁴ Franc	.01016	98.42
Brazil Cruzeiro (official free)	.2107	4.74	Germany D Mark	.2798	3.57
Britain Pound	2.4400	.40	Ghana New Cedi	1.0005	.99
British Honduras Dollar	.5364	1.86	Greece Drachma	.03403	29.38
Burma Kyat	.2144	4.66	Guatemala Quetzal	1.0209	.97
Ceylon Rupee	.1715	5.83	Guyana Dollar	.5367	1.86
Chile Escudo (bank rate) (free)	.0864 .0712	11.57 14.03	Haiti Gourde	.2042	4.89
Colombia Peso (fixed)	.05361	18.65	Honduras Lempira	.5105	1.95
Congo (Kinshasa) Zaire	2.144	.46	Hong Kong Dollar	.1685	5.93
Costa Rica Colon	.1541	6.48	Hungary Forint (official)	.0921	10.85
Cuba ¹ Peso	Iceland Krona (official)	.01160	86.20
Czechoslovakia Koruna	.1418	7.05	India Rupee	.1355	7.38
Denmark Krone	.1363	7.33	Indonesia ⁵ Rupiah

Country and Currency	Value of		Country and Currency	Value of	
	foreign currency unit in Canadian dollars at December 11	Canadian dollar in foreign currency units		foreign currency unit in Canadian dollars at December 11	Canadian dollar in foreign currency units
Iran Rial	.0142	70.42	Peru Sol (free)	.02348	42.58
Iraq Dinar	2.8586	.34	Philippines⁶ Peso (free)	.1590	6.28
Ireland Pound	2.4400	.40	Poland Zloty (fixed basic rate)	.2700	3.71
Israel Pound	.2917	3.42	Portugal & Colonies⁷ Escudo	.03551	28.16
Italy Lira	.001637	610.87	Saudi Arabia Riyal	.2062	4.84
Jamaica Dollar	1.220	.81	Sierra Leone Leone	1.508	.66
Japan Yen	.002856	350.14	Singapore Dollar	.3507	2.85
Kenya Shilling	.1526	6.55	South Africa Rand	1.4252	.70
Lebanon Pound (free)	.3165	3.15	Spain & Dependencies Peseta	.01467	68.16
Malaysia Dollar	.3335	2.99	Sweden Krona	.1974	5.06
Mexico Peso	.08168	12.24	Switzerland Franc	.2367	4.22
Morocco Dirham	.2051	4.87	Syria Pound (free)	.2819	3.55
Netherlands Florin	.2832	3.53	Thailand Baht (free)	.04952	20.19
Netherlands Antilles Florin	.5414	1.84	Trinidad & Tobago⁸ Dollar	.5105	1.95
New Zealand Dollar	1.1419	.87	Tunisia Dinar	1.9447	.51
Nicaragua Cordoba	.1458	6.85	Turkey Lira	.06806	14.69
Nigeria Pound	3.017	.33	United Arab Republic Pound (official)	2.3482	.42
Norway Krone	.1431	6.98	United States Dollar	1.0209	.97
Pakistan Rupce	.2144	4.66	Uruguay Peso (free)	.004084	244.85
Panama Balboa	1.0209	.97	Venezuela Bolivar (official free)	.2274	4.39
Paraguay Guarani (free)	.008168	122.42	Yugoslavia Dinar (official)	.08168	12.24

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 Mauretania, Niger, Senegal, Upper Volta, Cameroons, 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. Exchange rate in Philippines on floating basis with daily quotations by banks.

7. Approximately same rate for Portuguese territories in Africa.

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

Markets in Brief: MOROCCO

Area: 172,000 square miles.

Population: 14.6 million (1968); 3.2 per cent annual growth.

Climate: sub-tropical and Mediterranean north and west of the Atlas Mountains with warm, dry summers and mild winters. Tropical steppes merging into the Sahara desert south and east of the Atlas Mountains, with hot days, cool nights and little rainfall.

Language: Arabic is the official language but French is widely used in government and business circles. Trade literature and correspondence with Moroccan firms should be in French.

Currency: dirham; one dirham = Cdn.\$0.2048 (Nov. 1970).

Weights and measures: metric system.

Capital: Rabat.

Chief ports: Casablanca, Tangiers (free zone), Safi (phosphates), Kenitra (petroleum), Agadir (minerals).

Marketing centers: population (thousands) 1967—Casablanca 1,250, Rabat 379, Tangiers 165, Marrakech 270, Fez 243.

Economy: is becoming increasingly industrial though still basically agricultural, with large exports of citrus and other fruits. Phosphates is the principal individual export. Important mining activities.

Total Moroccan imports: 1969—Cdn.\$613 million; 1968—Cdn.\$601 million.

Chief imports: foods, beverages, and tobacco; fuel and raw materials (crude oil, gasoline, food oils); semi-finished products (intermediate paper products, fertilizers, chemicals, synthetic textile yarns, etc.); finished products for agriculture and industry (machinery and equipment, industrial machinery, automotive vehicles and spares); consumer goods (pharmaceuticals, textiles, domestic hardware and major appliances, automobiles and auto parts).

Chief suppliers: 1969—France, West Germany, United States, U.S.S.R., Italy, Britain.

Value of imports from Canada: 1969—Cdn.\$1.5 million; 1968—Cdn.\$4.6 million.

Chief imports from Canada: (Cdn.\$'000) 1969—rape-seed 1,230, yarn and thread 61, asbestos milled fibers 31, combination drills 18, inorganic chemicals 13.

Total Moroccan exports: 1969—Cdn.\$520 million; 1968—Cdn.\$491 million.

Chief Moroccan exports: foodstuffs, beverages and tobacco (citrus fruit, canned fish, tomatoes, wine); raw materials (phosphates, lead, iron and manganese ores); handicrafts (rugs, fancy leather goods).

Chief Moroccan markets: 1969—France, West Germany, Italy, Britain, Netherlands, Spain.

Value of Canadian purchases: 1969—Cdn.\$447,310; 1968—Cdn.\$969,393.

Chief Canadian purchases: (Cdn.\$'000) 1969—handbags and purses 64, crude vegetable material, inedible 64, fruits, preserved, not canned 52, oriental rugs 43, pimento 29.

Prices: quote in Canadian or U.S. dollars, c. & f. Moroccan port, preferably, but f.o.b. Canadian port quotations are sometimes required.

Usual terms of payment: normally sight 90 days but this depends on individual contract drawn up between Canadian exporter and Moroccan importer.

Samples: dutiable only if of commercial value.

Visas: not required for Canadian tourists or businessmen.

Foreign exchange and import regulations: imports controlled by "Programme General d'Importation" renewable each year. Consists of list A—goods which are liberalized (1968: 43 per cent); list B—items subject to specific quotas (55 per cent); list C—goods which are prohibited entry (2 per cent). In general there is no difficulty about payments for exports to Morocco. Foreign exchange is obtained from the Banque du Maroc, through the bank where importer is domiciled. Payment may be effected only after surrender of shipping documents.

Import controls, documentation, customs tariffs, marking and labelling: consult the Office of Area Relations, Department of Industry, Trade & Commerce, Ottawa.

Correspondence: airmail only; 15 cents each half ounce.

For detailed information on this market write to: Africa Division, Office of Area Relations, Department of Industry, Trade & Commerce, Ottawa, or Commercial Counsellor, Commercial Division, Canadian Embassy, Apartado 117, Madrid, Spain.

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