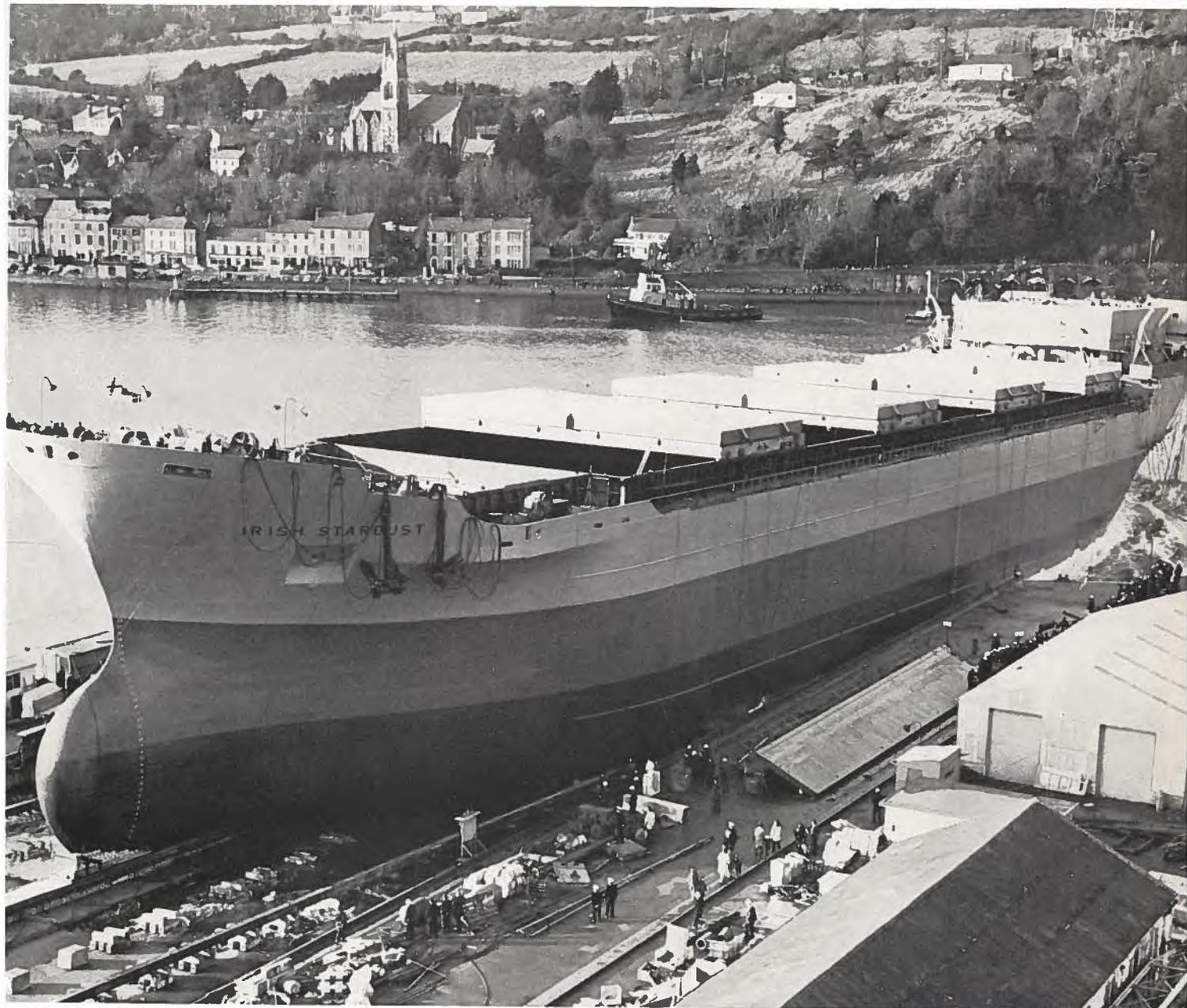


foreign trade

Food Markets in
California and France
Foreign Trade Service Abroad

Department of Industry, Trade and Commerce, Canada

March 13/71



Ireland Looks Forward and Back

Export Opportunities—a New Feature

Within a short time *Foreign Trade* expects to introduce a new feature that we believe will be helpful to many of our readers. It is the publication of inquiries for goods and services received from potential customers abroad.

The material for this "Export Opportunities" section will come from two main sources: the various posts of the Trade Commissioner Service abroad and the Industry Sector Branches of the Department here in Ottawa, each of which specializes in a specific commodity field. Each inquiry will bear the name and complete address of the inquirer and will give enough information about the product or service he is seeking to enable a reader to decide whether he wants to follow it up. He may then, if he wishes, enter into direct correspondence with the foreign client. We should like to make clear, however, that the complete services of the Department of Industry, Trade and Commerce remain at the Canadian supplier's disposal. Officers both in Ottawa and in the Regional Offices, and the Trade Commissioners abroad, stand ready to assist any firm investi-

gating these or other trade opportunities abroad. "Export Opportunities" is not intended to replace this service.

The introduction of a feature of this kind invariably raises the question—will it result in more business for Canadian firms? Naturally, although we expect to publish only inquiries that come to us from reliable sources, we cannot guarantee how many will result in firm business. But *Commerce Today*, put out by the United States Department of Commerce, which publishes trade opportunities, in a recent issue stated that within a twelve-month period "better than one in every four led to business success for a United States firm" and that "each sales opportunity published brought an average of five replies from United States firms." In addition, a number of agency agreements were completed and active negotiations looking towards sales were begun.

One of the often-heard arguments against publishing trade opportunities is that it means, in effect, giving away

useful commercial intelligence to possible competitors. Naturally, published material of this kind cannot be limited to Canadian readers. It is our belief, however, that most types of commercial intelligence are really not confidential. They do, for example, circulate widely among Trade Commissioners representing various countries in posts abroad, as potential customers seek the broadest possible range of sources for the products that they need. The business will go to a Canadian if he can supply the best product at the best price as quickly as possible.

Many of the trade inquiries will come in by telex and we intend to publish them without delay. We cannot, of course, vouch for the bona fides of the inquiring firms but pre-selection by officers of the Department should avoid many such problems.

Finally, by introducing this feature, we hope to provide readers with a useful service that may assist them in making valuable new contacts and extending the range of their export business.

foreign trade

Vol. 135 No. 6

March 13/71



The Hon. Jean-Luc Pepin, 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, KIA OH5 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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COVER: This peaceful scene, introducing our review of the market in Ireland, shows the vessel *Irish Stardust* being launched at the Verolmex Dockyard in Cork.

Ireland

Looks Forward and Back

The Irish coped with difficult economic problems in 1970 but exports and imports both rose. Effects of possible entry into the EEC are being debated. Canadian sales have risen, with aluminum, wheat and newsprint in the lead.

R. A. BULL, Commercial Counsellor, Dublin

It was a difficult year for the Irish economy. In the words of a leading financial paper: "Had anyone accurately predicted the events of this, the first year of a new decade, he would have been accused of being a dismal pessimist." A five-month strike by cement workers overlapped a six-month bank strike, the effects of which are still being measured. Fortunately, they were probably deflationary because the cost-of-living index rose by at least 8½ per cent and the growth rate of the gross national product fell to 2 per cent, half the 1969 rate.

The Employer/Labour Conference, faced with the alternative of a Prices and Incomes Bill, has worked out a national agreement that could limit wage increases to about 12 per cent during 1971. If the agreement helps to avoid serious strikes, the resulting improvement in productivity may help to slow the rise in unit costs that is rapidly making Irish exports non-competitive.

Labor cost per unit in Ireland (1963 = 100) during the first quarter of 1970, at 136½, compared unfavorably with 124 in Britain, 120 in Canada, and 111 in Germany. Half this increase has come during the past two years. During the same period export prices have risen 25 per cent. The deficit in the over-all balance of payments has doubled to about £60 million.

Agriculture made slow progress during 1970, and prices rose 4 to 5 per cent. A useful fall in milk production was accompanied by a significant increase in beef cattle as farmers began to anticipate larger markets in Europe. For the first time in five years, sheep numbers also rose as exports of lamb increased.

Industrial production, of growing significance to the Irish economy and



This container crane at Waterford is said to be one of the four largest in the world. With the use of this crane, Waterford, the main port in southeastern Ireland, makes possible a turn-around time of seven hours for small coastal container vessels.

exports, has risen over 10 per cent in most recent years. In the first quarter of 1970 it rose less than 7 per cent. In the second quarter it fell and unemployment increased. Consumer prices were 7 per cent higher but actual domestic consumption remained almost static.

Exports were higher than in 1969, reaching an estimated record £465 million. Imports did not rise as rapidly. To the end of November the trade deficit, at £202 million, was only a few million above 1969. As usual, most of this will probably be offset by earnings on such invisibles as tourism and emigrant remittances. The rest may be covered by the capital inflow which in 1969 exceeded £70 million.

Among the adverse effects attributed to the bank strike is the encouragement it gave to Irish businessmen to keep more of their working capital in British banks. The well-publicized internal difficulties in Northern Ireland have had repercussions in the Republic. The economic impact has been slight but Irish businessmen are worried that overseas investment may be put off by exaggerated fears of political and economic instability. Recent official moves, including an increase in company taxation and limits on the benefits offered to new export industries, may also slow up foreign investment.

Tourism is Ireland's biggest foreign exchange earner, bringing in over £100 million (a quarter of a billion dollars) in 1970. But lately all has not gone well. Although accommodation has been going up by about 10 per cent a year, revenue has been increasing more slowly. In 1970 it rose less than 3 per cent. With higher costs, consumption actually was lower. There were complaints that Bord Failte, the official tourist promotion organization, was not spending enough on promotion and that Ireland was becoming too expensive for middle class tourists. One newspaper has reported that some 60 small hotels might be for sale this winter; another stated that package tours from Dublin by air to Spain or Yugoslavia now cost less than similar tours in Ireland.

Ireland and Europe—Irish negotiations with the European Economic Community began quietly last June. There has

been some opposition from nationalists who fear that Irish sovereignty and the Irish language may suffer. A group of economists is opposing the Common Market on the ground that it will lead to a concentration of Irish agriculture into few (and perhaps foreign) hands, raise prices to consumers, inhibit industrial development, and weaken Irish culture. At first this opposition was not taken very seriously by the Government. The majority party, Fianna Fail, supports EEC entry. So does the main opposition party, Fine Gael. Only the minority Labour Party has reservations. The general public has tended to ignore the issue. Businessmen, adopting an attitude of wait and see, are inclined to feel that given the right terms, Ireland may do very well in the Common Market. In recent weeks Ministers have spoken out in favor of membership and distinguished Europeans like Dr. Luns and Dr. Mansholt have argued the case for Irish entry to friendly audiences.

At present only preliminary talks have been held. The EEC has been told of Irish concerns: inshore fisheries, "sensitive" industries, regional industrial development policy, and farming subsidies. As with the Danes and Norwegians, progress in the Irish negotiations inevitably depends on Common Market negotiations with Britain. In the words of the Minister for External Affairs, Dr. Hillery, "Our economies are too closely connected for Ireland to act separately".

The relevance of British/EEC discussions is increased for Ireland by the Anglo-Irish Free Trade Agreement. Under this treaty, all tariff and quota protection on industrial goods imported from Britain will be dismantled between 1965 and 1975 (the next series of tariff reductions is due in July 1971), except for food processing, jute and automobile assembly, plus a short list of "sensitive" industries now being negotiated as part of the mid-term review of the Agreement. By the completion of Free Trade in 1975, about 70 per cent of current Irish industry will be unprotected from British competition. If Ireland and Britain both join the EEC according to the present time-tables, the remaining 30 per cent of present Irish industry will see its protection disappear between 1975 and 1978—unless, as is probable, some sort

of special treatment for certain industries in the less industrially developed countries of the new 10-member EEC is worked out.

If Britain does not join the Common Market, the Irish dilemma will be compounded. Britain is Ireland's main supplier (£310 million out of £589 million in 1969) and chief customer (£243 million out of £371 million). Free trade would expand this interdependence. But, as in Canada, there are businessmen in Ireland concerned about the implications of over-dependence on one market, however easy and attractive it may be to sell in. The alternative, joining the Common Market without Britain, seems incredible, but it could offer opportunities to Ireland over and above the lessening of British influence. With the labor surplus in Ireland, new industries on an EEC-wide scale would be possible. Access to a really big market for Irish agricultural products would be assured and land now under-utilized could make Irish farmers very competitive with other EEC farmers.

Irish exporters have some reservations about 1971. Export profits are not taxed but the increase in profit tax on domestic sales, which is payable on 1969-70 earnings, may leave many exporters short of working capital. The refusal of the Government to allow the use of replacement cost for depreciation may keep obsolete plant in operation. The drop in liner traffic on the North Atlantic has left many Irish ports without a direct shipping service, except to Britain or Europe.

Irish exports start by paying "double-handling" or "pre-terminal" costs, the costs involved in shipping to Liverpool or Rotterdam (incidentally, these are identical from Dublin) where the goods can be transshipped to ocean-going services. "The most expensive stretch of water in the world is that between Dublin and Liverpool," says one expert. Container traffic may help to lower costs and increase speed of delivery. It has undoubtedly benefited Irish ports, where agreements with labor for efficient container handling have been possible. Waterford has one of the biggest container cranes in the world, a turn-around time on small coastal container ships of seven hours, and three services a week to Rotterdam. But other ports, Cork and Lime-

This complicated piece of machinery is a Desma 609 for injection moulding vinyl boots at the Dunlop plant in Cork. The finished product is seen in background and in the inspector's hand. Color of the boot? Green, of course.

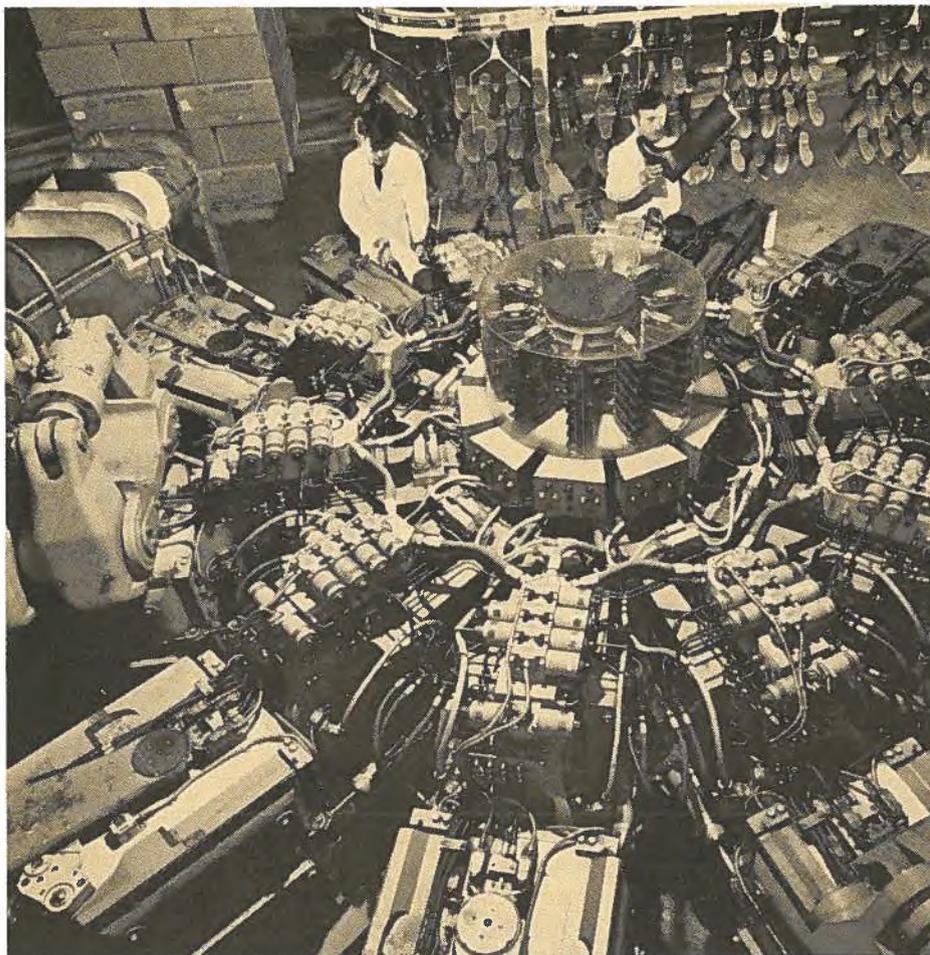
rick for example, lack sufficient regular shipping and one of the biggest of the Irish container shipping companies has just gone bankrupt.

Canadian exporters to Ireland also suffer from the absence of shipping. Lumber takes months for delivery. Newsprint has to be sent in loads larger than the customer can conveniently store. Significant quantities of grain and oilseeds do not appear in our exports to Ireland because they are being shipped via third countries.

Britain provided 53 per cent of Irish imports and took 65 per cent of Irish exports in 1969. The Six Counties of Northern Ireland took a disproportionate (20 per cent) share of Irish exports to Britain but provided less than 10 per cent of Irish imports from Britain. Other good customers are the United States (£38 million in 1969), France (£13 million), West Germany (£11 million), Netherlands (£7 million), Belgium and Italy (£5 million), Canada (£4 million), Spain, Sweden and Japan. The same countries were also Ireland's main suppliers: United States (£52 million), Germany (£43 million), France (£17 million), Netherlands (£14 million), Sweden and Italy (£10 million), Canada (£9 million), Finland, Belgium and Japan.

Irish exports depend heavily on agricultural products, particularly live cattle, meat and dairy products. From largely Canadian-owned and developed mines come metal ores. Among manufacturers are found companies making medical and pharmaceutical products, machinery, clothing and footwear, and scientific equipment. Compared with the first nine months of 1969, exports rose in value by 16.1 per cent (£43.3 million) in 1970, of which agricultural products provided £15 million, textile yarns and fabrics £3.2 million, metal ores and scrap £3.2 million.

Irish imports are divided among materials for further production, nearly 60



per cent, capital goods, nearly 20 per cent, consumer goods, over 20 per cent. Significant items include live animals, fruits and vegetables, lumber and paper, textile fibers and yarns, petroleum, chemicals, plastics, medicinal and pharmaceutical products, metals and machinery. Imports increased by nearly £40 million during the first nine months of 1970. Of this increase, fuels provided £5 million, chemicals £6 million, iron and steel £2.4 million, textile yarns and fabrics £3.1 million, power machinery, switchgear, etc., £1.5 million.

Trade with Canada—Under the Irish tariff, imports from Canada are subject to a preferential scale of duties equal to or more favorable than for any country except Britain, including the other members of the Commonwealth. In practice, most products of major concern to us enter duty-free, either by the tariff or under licence from the Minister for Industry and Commerce. These include lumber, grains, pulp and paper, aluminum and other metals and mining machinery. Payment of duty is

required mainly for consumer goods and products also manufactured in Ireland.

Irish entry into the EEC would eventually eliminate our favored status. Wheat, oats and barley would be subject to levies under the EEC Common Agricultural Policy. They will be bought anyway—wheat because it is required to blend with soft domestic wheats, oats because they are the chosen food of Irish racehorses—but the levies will make them less competitive. Industrial products would eventually face the EEC Common External Tariff although it is expected that, if the negotiations are successful, there will be a full year transitional period before the full effects would be felt.

Trade between Ireland and Canada has been quite stable in recent years. The balance favors Canada by about two to one, but Irish exports have risen steadily in value every year since 1965. This year a figure of £6 million (\$15 million) is expected. Canadian exports to Ireland, recovering from the adverse

IRELAND'S FOREIGN TRADE

	£'000 1968	1969	Jan.-Sept. 1970
Principal Exports			
Live animals	57,986	54,718	44,081
of which:			
store bullocks	32,713	32,260	26,203
store heifers	12,483	10,559	8,480
horses, bloodstock	4,301	5,398	2,994
Meat and meat preparations	59,201	66,501	51,840
of which:			
beef, fresh or chilled	23,469	24,875	22,011
beef, frozen	12,964	15,479	10,325
pork	2,383	6,071	4,404
bacon, not tinned	8,096	8,371	6,401
Dairy products and eggs	21,807	21,687	19,141
of which:			
creamery butter	9,824	9,415	8,684
cheese	6,133	5,611	4,694
Metal ores and scrap	10,951	19,658	16,581
Textile yarns, fabrics and articles	16,580	18,224	16,381
Clothing and footwear	16,461	19,730	16,208
Electrical machinery, etc.	12,873	13,148	10,185
Total	323,411	358,208	300,651
Principal Imports			
Machinery (non-electric)	60,077	82,054	66,034
Mineral fuels and lubricants	40,929	44,657	38,580
Transport equipment	34,950	58,076	37,951
Textile yarns, fabrics and articles	32,239	38,513	31,515
Electrical machinery	24,755	31,135	27,475
Manufactures of metal, n.e.s.	16,851	19,831	16,773
Iron and steel	14,857	19,668	16,563
Paper and paperboard	13,590	16,246	13,690
Live animals	15,175	16,571	12,647
Plastic materials	11,454	13,844	11,930
Fruits and vegetables	13,344	14,706	11,328
Cereals and cereal preparations	15,293	11,419	9,690
Total	496,093	588,930	474,223

CANADA'S TRADE WITH IRELAND

	Cdn.\$'000 1968	1969	Jan.-Sept. 1970
Principal Exports to			
Primary aluminum	2,025	4,197	1,760
Wheat	1,467	542	1,505
Newsprint	1,568	1,834	1,348
Wood pulp	386	640	864
Unmanufactured tobacco	308	889	648
Barley	nil	nil	455
Salmon	767	666	441
Lumber	427	879	438
Rock drilling machinery	118	118	304
Steel rods and bars	nil	7	198
Mining and quarrying machinery	120	209	186
Apples, fresh	120	80	153
Total	11,124	13,949	10,348
Principal Imports from			
Cortical hormones	298	888	774
Sweetened cocoa	930	304	788
Copper ores, concentrates and scrap	nil	nil	744
Boots and shoes	345	831	671
Medical and surgical instruments and parts, disposable syringes, needles and parts	657	633	546
Rock drill bits	383	444	503
Blended wool yarn	17	159	481
Apparel	370	398	350
Industrial diamonds	396	615	297
Double knit fabrics, polyester	153	489	297
Refractory cements and mortars	273	462	282
Feeds and concentrates	nil	171	272
Total	9,675	11,102	9,854

Source: DBS

effects of the devaluation of the Irish pound and stimulated by more difficult selling conditions in the easier United States market, have risen and should exceed £10 million (\$25 million) on a c.i.f. basis.

Canadian exports to Ireland are dominated by the traditional bulk products—grains, salmon, lumber, paper—but they include a mass of smaller shipments: frozen vegetables, grass seed, asbestos, veneers, yarns and fabrics, metals, machinery, electrical equipment, tools, sporting goods, toys. Interestingly, they do not tally with Irish import statistics. Setting aside the

obvious variations caused by f.o.b. vs. c.i.f. prices, delays in reporting, and goods in transit at year's end, there are some interesting anomalies reflecting the shipping problem. In wheat, for example, Canadian figures for quantity are as a rule about one-third the Irish figure. Rapeseed does not appear in our statistics at all. Also missing but shown by the Irish as imported are linseed and soya bean cake, flaxseed, muriate of potash. The effect is to make our f.o.b. totals less than two-thirds the Irish c.i.f. import total.

Doing business in Ireland is not difficult. Customers are friendly and relia-

ble. The market for many specialized or high-value products is not large but it is discriminating. Frankly, we at the Commercial Office in Dublin feel that too many Canadian businessmen are content to take the Irish market for granted or to write it off as too much trouble to follow up. If this is what you think, why not check to see whether you are right? Perhaps you have been missing opportunities because you lump Ireland in with Britain and leave it to your representatives in London. Write, or better still, visit Dublin. You'll enjoy the scenery and we'll try to ensure that you do some business while you're here.

The Food Market

...in Southern California

New trends in merchandising and packaging and a growing emphasis on the food service sector make this \$7.6 billion-a-year market a worthwhile one for Canadians.

D. M. LAWSON, Consul and Assistant Trade Commissioner, Los Angeles

There is just no getting away from it: people eat. In fact, they insist on eating. Combine that with a traditionally high personal disposable income and an explosive rate of population growth, and the outlook for the food industry at all levels in California couldn't be better. Let's examine the record to get some idea of consumer taste patterns and the growth of the industry to date.

The population of California is now about 20 million. Most authoritative reports predict that it will double to 40 million by the year 2000, or at 1.5 times the U.S. national average rate. People move into California at more than 5.4 times the average for other states, proof of the lure of the land of the Vaqueros, the land of sand and sun. Some estimates put the 1985 population at about 30 million. But what does all this mean?

The implications are straightforward: current Southern California retail grocery products sales of \$5.4 billion and the current gross of public eating establishments of \$2.2 billion add up to a \$7.6 billion yearly market. Rough projections of the total give 1985 food industry sales at \$12 billion (in 1970 dollars) for Southern California alone.

An interesting sidelight is that the National Restaurant Association reports that the typical American eats every fourth meal away from home. The prediction is that this figure will soon change to every third meal. This trend started in Southern California, where the whole franchise/chain eatery boom began. For the food industry, this means greater emphasis on processing for institutional or food-servicing industries, instead of retail consumption.



The "store within a store" approach in a Los Angeles supermarket, where a gourmet section is set apart from the main floor. Bilingual labelling demanded in Canada has a spin-off benefit in California—French adds "mystique" and brings higher price.

The food market is served by a manufacturing, brokerage, distribution and retail sales network, the core of which is located within five to ten miles of downtown Los Angeles. Outlying areas in California and neighboring states, including cities like Phoenix, Las Vegas,

San Bernardino and San Diego, are also serviced from Los Angeles. This concentration makes it one of the largest food and beverage marketing areas. It is also one of the largest food-processing centers in the world. The competition is fast and furious

and marketing plans must be well thought out. In food items alone, Los Angeles is offered roughly 200 new items each week! Yes, new items. Obviously most never achieve acceptance, but for those products with a concept and marketing policy backed by sound planning, a crack at this \$12 billion market will prove worthwhile.

The traditionally high personal income is reflected in the consumption patterns of Californians. Statistics show that, on average, the Californian annually consumes about 25 per cent more of the following items than the U.S. norm:

- Prepared baking mixes
- Instant breakfasts
- Instant potatoes
- Soap for automatic dishwashers
- Vegetable and fruit juices
- Beef and beef products
- "Foreign" foods
- Pet foods
- Cakes, frozen
- Bottled spring water
- Frozen foods—all types
- Mexican food (twice the U.S. average)
- Oven cleaners
- Powdered cream substitutes
- Diet foods
- Wines (twice the U.S. average)
- Deli foods
- Dessert pies, frozen
- Soft drinks

Western supermarkets usually devote 109 linear feet to frozen food cabinets, 31 per cent more than the U.S. average. Many of these cabinets are the new double-decker type, which handles 50 to 60 per cent more than the standard variety. Land costs may force California chains to erect double-level markets, and stores to expand on the "store-within-a-store", or "boutique", concept of laying out shopping areas. This may influence food packaging and merchandising.

The trend will be away from the long row upon row of cans and boxes and toward "decorated" sections for each general class of goods. We will see more of "Ye Olde Spycy Shoppe" and "Aunt Bertha's Down-Home Preserves" type of merchandising. A processor, for instance, will offer to put in a rack or booth and stock it himself or through his broker with a complete variety of his own products. One or two competing racks or booths will

then comprise the whole section. In other words, products will be grouped by brands (national or house) instead of commodity, with the brand areas picked out in distinctive designs or decorations.

The stores like the idea of borrowing the aura of prestige that a brand cultivates carefully through advertising campaigns and embodying this in the decor of the brand boutique. It dresses up what is otherwise a pretty sterile environment. It imparts a sense of intimacy and harks back to the "general store" image. It saves the shopper's time because she usually will go straight to her preferred-brand area. It also stimulates impulse buying and magnifies the impact of an addition to a brand's product line. The old-fashioned method puts all the peas together, for instance, so that the shopper has to travel all the way down the aisle to find her favorite brand. If she isn't buying zucchini that day, she may miss the fact that her favorite brand is introducing a new zucchini—and one more impulse sale is lost.

This merchandising technique will demand more homey labelling and packaging. The avant-garde merchants whisper of "funky foods". For instance, Pet Milk Corporation's new corn-puff snack is called Screaming Yellow Zonkers, with the carton lithographed in basic black with stylized Peter Max characters advising unorthodox methods of eating the stuff. We point this out to emphasize several points. The first is that there is a plethora of items on the shelves (supermarkets average about 14,000). Second, there are over 13,000 retail stores, ranging from holes-in-the-wall to four-acre super-colossal food giants. Third, the whole system operates on margins ranging from 5 per cent at best and often to as low as $\frac{1}{2}$ per cent. Fourth, some 200 new items a week vie for shelf space. So it's easy to see how the industry has boxed itself in with the stereotyped store, store layout, and range of products. The only possibility of achieving higher markups is to become more aware of what motivates people to choose brand X over brand Y.

Another development forecast is the introduction of third-generation convenience foods. Here the frozen-food sector should continue to gain. Let's take an example: first came frozen

fish, then frozen prepared fish like fish sticks and fish and chips, and now we have the first signs of prepared sophisticated dishes that are often superior in taste to what the housewife can produce. Stouffer Foods is the current leader, with a range from lobster thermidor to beef enchiladas to baked lasagna. The sauces and seasonings for all of these are excellent. The end result is not just a frozen hunk of basic food, but rather a complete dish one is proud to serve to guests. On a less exotic level, Certi-Fresh has introduced a new fish'n cheese stick package which comprises six 2-ounce sticks stuffed with cheese—the first improvement on the basic stick introduced 15 years ago.

We foresee a growing awareness of "ethnic" or "real" or "cultural" type foods. Packages, labels and contents will have to impart a sense of identification with something that is not the norm. This will result from two trends:

1. More eating out, which gives the consumer the proper atmosphere in which to try out an unfamiliar dish.
2. Desire to emulate in the home what he has been exposed to in restaurants. So far this has been almost impossible because most markets carry foods that are reduced to the lowest common denominator in order to achieve widest appeal. Consumer resistance to "something different" is at low ebb.

The possibilities are good for well-packaged, well-labelled quality foods that may be described as Canadian, French-Canadian, English, French, German, Italian, Chinese, Old-Fashioned, etc. But a word of warning here: you will have to meet the United States Food and Drug Administration labelling requirements and should study them before having any labels or packages printed. The important thing to remember is that the product doesn't necessarily have to be strictly ethnic in the sense of "English" marmalade, or "Italian" spaghetti. Progresso Foods, a United States firm, has about 160 items, all with an Italian, or more accurately an Italianesque, image. Campbell Soup's Belgian-image "Godiva" chocolates are made in New Jersey.

There are basically nine chains in Los Angeles big enough to buy direct from

the supplier. There are two major co-op wholesalers, Certified Grocers and A. M. Lewis Inc., who cover about 80 per cent of the independents and the small chains. The wholesalers are the price pace-setters.

Regardless of whether a Canadian food-processing firm is seeking complete coverage or simply several selected accounts, to make the venture successful, the firm must use a food broker. Almost all chains insist on having their precious space allotted to a product serviced by the processor or his representative. In other words, a firm is allotted X inches of shelf space so that the store will profit from larger sales than those of the product previously occupying that space. The processor must stock his space, keep it clean and neat, and supply point-of-purchase literature. The secret of successful store management is "throughput with a minimum of handling". The same is true for distribution management.

We normally recommend that the Canadian processor be prepared to keep in a warehouse in Los Angeles a working supply of the product. A potential broker or the Los Angeles Trade Office can recommend clean, well-managed warehouses. The broker will stock promotion material himself and will either have an in-house "detail" fleet to look after your assigned shelves or contract that function out to specialists. The method of packaging is important. Clean four-sided lithography, combined with export-gauge corrugated cardboard and perforated zip-around opening tabs set one or two inches down from the top are a virtual must. Not only does this decrease breakage but it also facilitates restocking and pricing procedure. Anything to save time.

Your broker, who will be "Your Man in Los Angeles", would normally be a member of the National Food Brokers Association, be known and recommended by this office, and probably already handling another Canadian

Smaller aisle and shelf layout gives a degree of intimacy and "quaintness" to exotic or foreign food areas.

line. Brokers work on a margin of about 5 per cent. Specialty food and beverage brokers may ask for more. The broker opens new accounts, services existing ones, and handles any problems that arise. The California retailer insists on having a local "whipping boy" at the other end of the telephone. Also the broker keeps your product from being replaced by one of those 200 new products per week. Who was it who said "Know thine enemy"?

There are a few other lucrative channels for the Canadian firm that doesn't relish jumping into mass-market merchandising. For so-called gourmet-type foods, one might try to market through either Reese Finer Foods of Chicago, or Fancifoods of San Francisco. These competing firms have concessions in various chains for the "foreign food" section of each store. Many packs carry private labels on a "packed for" basis, but the firms also carry established brands from other countries. Canada Vinegars' "Bisto" gravy mix gets good coverage that way.

Another alternative is private labelling, subcontracted for an established brand or for a retail chain large enough to create house brands. The packaging can be done at the Canadian plant or contracted for here in Los Angeles, with the product shipped in bulk.

Canadian distilled spirits shipped in bulk high-proof form enjoy a substantial and increasing demand here,

as more supermarket chains and large liquor retailers develop house labels. There are ample rectifying and bottling facilities in Los Angeles, and services can be on contract, sometimes for a surprisingly reasonable fee. We can put you in contact with established food and liquor brokers or "case goods" distributors if you are going to "private label" for two or three accounts only.

As mentioned earlier, Los Angeles is also the focal point for food processing for the southwestern United States. This, combined with the giant restaurant and "fast-food" trade, has precipitated a need for basic and exotic raw materials that the trade refers to as "institutional goods". They run the gamut from raw stock to chemical additives, preservatives, essences and aromatics, and protein concentrates from animal, vegetable or fish sources.

Normally, processors and fast-food chains that run a central commissary are specific about what they want. An example is the fish'n chip trade that is gradually switching to an individual wedge-cut (or diamond- or oblong-cut) portion-controlled style weighing X oz. \pm 10 per cent, which suppliers must ship in a crinkle-tray layer-pack. The shapes are uniform for better batter adherence, cook-up effect, serving size (which is simply a multiple of the unit), and handling. The portion-control system also reduces labor costs at the "front line", because there is no need to cut, weigh, and roll in batter random-size raw



fillets. Any labor-saving process is an advantage.

It should be remembered that within this general picture, there are exceptions. Some institutional users prefer the home-cooked image. It is only a question of time, however, before California wage rates make the personal touch an extravagance.

We receive current price lists from the United States Government, from the state, and from Certified Grocers.

We can tell you immediately what your maximum c.i.f. duty-paid Los Angeles price must be to meet the competition. We can also call on several reputable brokers to give us a situation report on a specific commodity. This will reveal the supply and demand situation for new lines being introduced, what the chances of a successful introduction are and whether there is a place for your product.

If the situation looks promising after our initial survey, we recommend that,

before making any trade commitments, you clarify your own sales and plant production capability and delivery dates, and your promotion plans. The next step is the obvious one: a personal visit. We can help you meet potential brokers and potential accounts. We have the facilities and the experience to give trade receptions to kick off your marketing campaign. In fact, we are the "thin edge of the wedge." The main impetus must come from you, but the rewards will be yours too!

...and in France

Canadian seafoods sell well, but supermarkets are also offering greater choice than before and consumers are becoming more price-conscious.

FLORENT G. BEAUDETTE
Commercial Secretary (Agriculture),
Paris

France offers prospects for a variety of foods, especially fish and seafoods, despite many import restrictions and other problems. About 15 per cent of France's 50 million people still live on more than a million farms. Agricultural raw materials are abundant—most crops yield well. But costs are high, and exports outside the EEC are heavily subsidized.

In the last few years, the country's food-processing industry, which traditionally consisted of thousands of small family firms, has been consolidating and some of the large international food houses (Unilever, Nestlé, Corn Products, Heinz, for example) have been buying local firms and building plants, chiefly as bases for selling to the Common Market. The authorities are encouraging this trend, because it strengthens the industry and enables it to compete against foreign firms. The process will undoubtedly continue, particularly in view of possible British entry into the EEC. Britain has a well-organized food-processing industry.

The French food-distribution system is just starting to modernize itself. At the beginning of 1970, most of the 1,500-



Bread, wine and soup—traditional staples of the average French family. But merchandising methods are changing and more varied foods are coming in.



The Robin Hood Multifoods exhibit at the International Food Salon held last November in Paris, where Canadian food manufacturers were well represented. There are many prospects for selling Canadian foods, and it's a good base for EEC activities.

odd supermarkets were doing a good business, but there were still some 200,000 small stores, mostly specializing in either bread or fresh meats or dairy products. Prices are lower in the supermarkets, to the consumers' joy, but the rapid disappearance of thousands of small shopkeepers is creating a social problem.

On the importing side, the system remains traditional, with agents sending orders to foreign suppliers for direct shipment to importers or users, or importers acting as their own agents. From the importer, the products then follow the usual channels through wholesalers or wholesaler-distributors to retailers. There appears to be some move away from agents, but on the whole, buyers generally continue to

use them to look after the considerable paperwork involved.

France prohibits imports of certain products. The list, though it is getting shorter, still includes the following items, among others: frozen fruits and vegetables, jams and marmalade, canned tuna and sardines, pickles, and some dehydrated vegetables. There are also health regulations which prohibit Canadian exports to France of such products as fresh potatoes and poultry.

What, then, can Canadian food firms sell in France? On the meat side, there is a good demand for frozen horse-meat and offals of all types. Honey has been selling well—mostly in bulk, though several brands of packaged honey are now available. Canned corn

is beginning to gain some acceptance among French consumers and our supplies are competing with those from the United States, Israel and South Africa. Cake mixes, some from Canada, are also making their appearance on grocery shelves, but Canadian suppliers of such products may have to make substantial changes in their mixes to satisfy French food and drug regulations. For example, enriched flour is not allowed.

The attached table provides details on the major items in our agricultural and food exports to France for three years. Canada is a leading supplier of frozen salmon and pike, and of lobster and scallops, and probably will remain so. There is also a constant demand for sole filets, crabmeat and shrimps. But

Canadian foods find their way right up into the Alps, as the top shelf shows in this store in the Maurienne district of France. Small stores like this, however, are being crowded out by supermarkets offering lower prices.

MAIN CANADIAN FOOD EXPORTS TO FRANCE

	Cdn.\$'000		
	1967	1968	1969
Frozen offals	484	316	419
Sausage casings	—	193	127
Tallow	46	—	161
Seeds	253	218	211
Frozen salmon	4,936	4,623	6,272
Frozen pike (whole and fillets)	203	283	290
Frozen sole fillets	127	168	101
Canned salmon	1,015	495	443
Lobster in shell	266	214	462
Other shellfish	172	115	506
Wheat	802	812	6,736
Pulses	3	67	250
Honey	18	107	123
Canned corn	8	8	47
Whisky	135	91	131
Flaxseed	—	1,244	1,053

Source: D.B.S.

our crabmeat products are meeting increasing competition from Japan and the U.S.S.R., and shipments from Persian Gulf countries, India, West Africa and Brazil are competing with our shrimp products. Canadian suppliers must keep up the quality for which they are already known and be prepared to be competitive in prices.

Quality, however, is unfortunately becoming less important here than price. Importers are bemoaning the fact that, with the coming of supermarkets, French housewives have become far more price-conscious than before. Canadian sales of canned salmon, for instance, have suffered from the low-priced competition from Japan.

In 1969, Canada's percentage share of the French market in the following products was: frozen salmon 50 (United States 35); frozen sole fillets 30 (Senegal 35); lobster 35 (Britain 35); canned salmon 15 (Japan 60, U.S.S.R.



20); canned crab 2 (U.S.S.R. 60 and Japan 30).

New opportunities are opening up here as the French food distribution industry is modernized and consumer preference moves toward the "convenience" foods. The increasing inte-

gration of member countries within the Common Market also creates greater opportunities for Canadian suppliers. We at the Commercial Division of the Canadian Embassy in Paris (35 Avenue Montaigne, Paris 8, France) are ready to help you take advantage of the opportunities.

India Inaugurates Aluminum Complex

The aluminum industry in India reached an important landmark with the opening of a new smelter, part of a \$65 million processing complex, at Belgaum, in the west coast State of Mysore.

The smelter adds 33,000 tons to the annual production capacity of the Indian Aluminium Company, of which Alcan Aluminium Limited, a Canadian company, is the major shareholder; the other owners are more than 5,000 Indian shareholders. Capacity will soon be increased to 45,000 tons; ultimate design capacity is set at 110,000 tons. The new plant brings the Indian Aluminium Company's total production capacity to 77,000 tons, or more than one third of the national total.

The smelter and alumina plant at Belgaum, and bauxite mining operations nearby, are the largest installations of the

new complex already in operation. A foil rolling plant at Kalwa, near Bombay, produces plain and decorative foil.

Alcan contributed equity investment, technical knowhow and management assistance throughout the long growth period of the Indian company. For the current project, Alcan additionally subscribed \$6 million in new common shares and the Export Development Corporation of Canada made a loan of \$5.5 million to cover purchases of Canadian equipment. Some \$40 million, or two thirds of the project financing, was raised in India and the Export-Import Bank of the United States made loans of \$12 million to cover purchases of U.S. equipment. Of the total expenditures, some \$15 million remains to be made in 1971-72, mainly to complete a 15,000-ton-per-year sheet mill near Bombay.

Greece Expands Its Power Network

Opportunities continue for consultants and equipment suppliers, but competition is keen. It is essential to offer financing in order to participate in major projects.

CLIFFORD SWIFT
Commercial Officer, Athens

The Greek Public Power Corporation (PPC) and other small independent power producers have made remarkable progress over the past three years in expanding the country's power network. Many remote villages and hamlets have been supplied with electricity for the first time, the power needs of new industries set up during this period have been fully covered, and power cuts have been discontinued after the introduction of new power plants and units into the interconnected system. Additional large units slated for commissioning over the next few years should ensure enough electric power to meet the needs until 1980 at least.

Planned projects of the five-year power program (1970-74) include both oil- and lignite-fired stations, and hydroelectric plants. Feasibility studies are under way of the country's water resources and its lignite and peat deposits.

New power units planned for commissioning and operation during this period will have a total net installed capacity of 1,359 Mw., comprising 617 Mw. oil-fired, 502 Mw. lignite-fired and 240 Mw. hydroelectric stations. Thermal plants burning refinery oil residue, to be built as part of the Onassis industrial complex, will add another 450 Mw. to the public system. Allowing for retirement of old units, installed capacity of the interconnected system (2,114 Mw. on December 31, 1969) will rise to 3,812 Mw. in 1974 and will consist of 949 Mw. (24.9 per cent) from lignite-fired units, 1,144 Mw. (30 per cent) from oil-fired units, 1,269 Mw. (33 per cent) from hydroelectric units and 450 Mw. (11.8 per cent) from the thermal power plants of the Onassis complex.

Forecast total output of 15,840 GWH for 1974 will include 6,271.2 GWH (39.6 per cent) from lignite-fired units, 3,431 GWH (21.7 per cent) from oil-fired units, 3,175.1 GWH (20 per cent) from hydroelectric units and 2,962.7 GWH (18.7 per cent) from the Onassis complex.

During the three-year period ended December 1969, power output increased by 52 per cent, or from 5,385 GWH to 8,165 GWH, and installed capacity by 65 per cent from 1,417 Mw. to 2,338 Mw., including 224 Mw. not forming part of the interconnected system.

Power consumption in the same period increased by 48 per cent to 7,398 GWH and is expected to rise by a mean annual rate of 14.7 per cent to 14,796 GWH by 1974.

Consumption in the private sector rose by 45 per cent between 1966 and the end of 1969, and is expected to increase by 15 per cent a year to reach 1,922 kwh. by 1974. By the end of March 1970 the number of PPC consumers had reached 2.7 million. Ninety-three per cent of the population had electricity by the end of 1969.

In the industrial sector, over-all consumption rose by 95 per cent, or 12,667 million kwh., during the period 1967-69, and in the heavy industry sector alone by more than 200 per cent. Industrial sales are expected to rise by an annual rate of 18.3 per cent to reach 6,173 GWH by 1974.

Gross investment in fixed assets is expected to reach U.S.\$1,049.45 million during the period 1970-74, an increase of 71.5 per cent over 1965-69. Generation projects will account for 45 per cent of the total, distribution 43.5,

transmission 9, and the balance of 2.5 for general facilities.

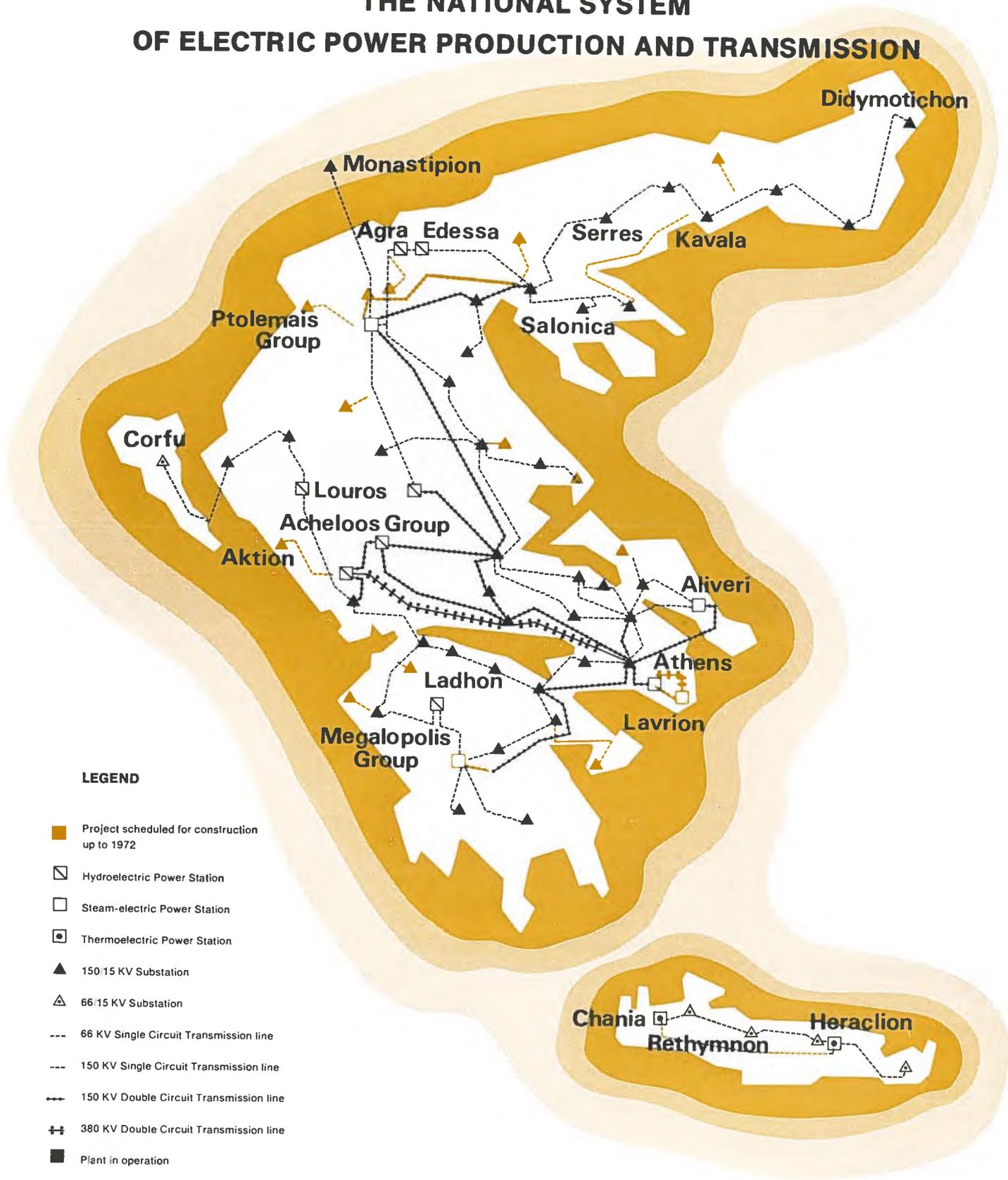
U.S.\$221.54 million, or 21 per cent of the total, will cover foreign exchange payments for supply and installation of imported equipment and material. The remainder will cover payments for domestic materials and construction costs.

By the end of 1974 five more oil-fired units will be brought into service with a combined capacity of 680 Mw., and three lignite-fired units with a combined capacity of 550 Mw. Two-oil-fired thermal units of 360 Mw. each will also be commissioned, plus two hydroelectric units at Polyphyton-Aliakmon, to give this station a mean annual output of 630 million kwh. During this period 158 kilometers of 380 kv transmission line will be laid. Research now under way into the country's resources of fossil fuels and waterpower may result in more lignite and hydroelectric units being scheduled to cover demands after 1974.

Newly discovered lignite deposits estimated at 840 million tons have been found at Ptolemais and at Megalopolis; there are about four billion cubic meters of peat at Philippi, and untapped hydro power potential is estimated at 21 billion kwh. Incidentally, a Canadian firm is taking part in the study on the hydro potential. Because of these reserves, a projected nuclear-powered generating unit destined for commissioning in 1974 may be postponed until 1980.

The program for 1975-79 is not yet firm on location of additional units but will include provision for a further 2,260 Mw. within the interconnected system. Details of 1970 purchases are not yet available, but some or all of

THE NATIONAL SYSTEM OF ELECTRIC POWER PRODUCTION AND TRANSMISSION





The Aliveri plant (above) was commissioned in December 1969 and has a mean annual output of one billion kwh. It was built in the record time of 18 months, and the equipment was supplied and installed by French firms.

the following were bought from abroad: copper transmission cables and copper steel alloy wires, steel cable, creosote, metal helmets, metal distribution panels of 30kv or more, tension modulators, rectifying devices, fuses, safety contact breakers, miscellaneous switches, metal accessories for networks and substations, condensers, and accumulators.

Local industry here can supply many of the requirements for this vast expansion of the Greek power complex. Many other items, however, will have to come from overseas. On the distribution side, these include control equipment, transformers, lightning arresters and treated poles.

Transmission line equipment—Oil-filled copper cable, copper conductors (also manufactured in Greece), and relays and connectors have to be imported, but requirements for the last two have been covered until 1972 through adjudications held in 1969.

Substations—Substantial quantities of material and equipment were ordered in 1969 from East Germany and Poland at very competitive prices. The early stages of four new substations (Lavrion-Palini) are being installed to cover all PPC requirements until 1972. Substation transformers of 150/22kv rating are not made in Greece.

Transformers of 380kv rating and associated equipment will be required for expansion of the power transmission line system, including the distribution centers and substations at Lavrion and Palini. Calls for bids should be announced in 1971/72, although East Germany has recently offered a complete range of equipment at "dumping" prices.

Power stations—Equipment needs have been covered until 1974, except for additional power plants to be set up as part of the Onassis industrial complex near Athens. Offers have already been submitted by West German,

French, U.S., British and Canadian suppliers, but no awards have yet been made.

Canadian suppliers and engineering firms are pursuing a number of other current requirements, including a national load dispatch center, audio frequency remote control units, four to six 5/6 Mw. mobile gas turbine generating plants, and 760 kw/750 r.p.m. or 940 kw/1000 r.p.m. diesel generating sets.

Consulting engineering—A U.S. firm, Ebasco of New York, has been retained since the formation of PPC as consultant for a wide range of services and has been training PPC staff, but a number of foreign consultants will continue to be engaged for specific projects. With the continuing expansion of the electrical power network in Greece, opportunities should arise for Canadians to participate in feasibility studies, preliminary reports, design engineering and construction super-

vision, particularly on hydroelectric projects. Several Canadian firms have made themselves known to PPC management, either through personal visits or through correspondence, and are following up developments here. The Athens office also maintains excellent relations with key PPC officials and is thus able to pass on information on upcoming consulting and engineering projects.

Procurement and financing—Equipment and material requirements for the PPC are programmed and budgeted for on an annual basis. Proposed purchases must receive Ministry of Commerce approval before tenders are called. Tender specifications are drawn up by the appropriate technical departments of PPC, payment terms by the Finance Directorate, and commercial terms by the Procurement Directorate. Calls for tender are published in the Greek Government *Gazette* and in trade and financial papers. Tender documents are made available in either Greek or English. The Commercial Division of the Canadian Embassy in Athens forwards details of all PPC calls for tender to the Electrical Division, Electrical and Electronics Branch, Department of Industry, Trade and Commerce, Ottawa, for circulation among potential Canadian suppliers.

Offers or proposals against calls for tender may be made in Greek or English. Some (but not all) tender terms call for a 2 per cent participation bank letter of guarantee to accompany the bid. Successful bidders are usually required to exchange this guarantee for a 10 per cent good performance bond or bank letter of guarantee.

The policy is to give preference to domestic industry (which enjoys a 30-35 per cent tolerance over foreign manufacturers) whenever possible and, when there are no domestic producers, to award the business to the most competitive bid. All purchases in excess of U.S.\$166 must be made through public call for tender, although exceptions are made occasionally and orders placed directly with suppliers who have been successful in earlier business.

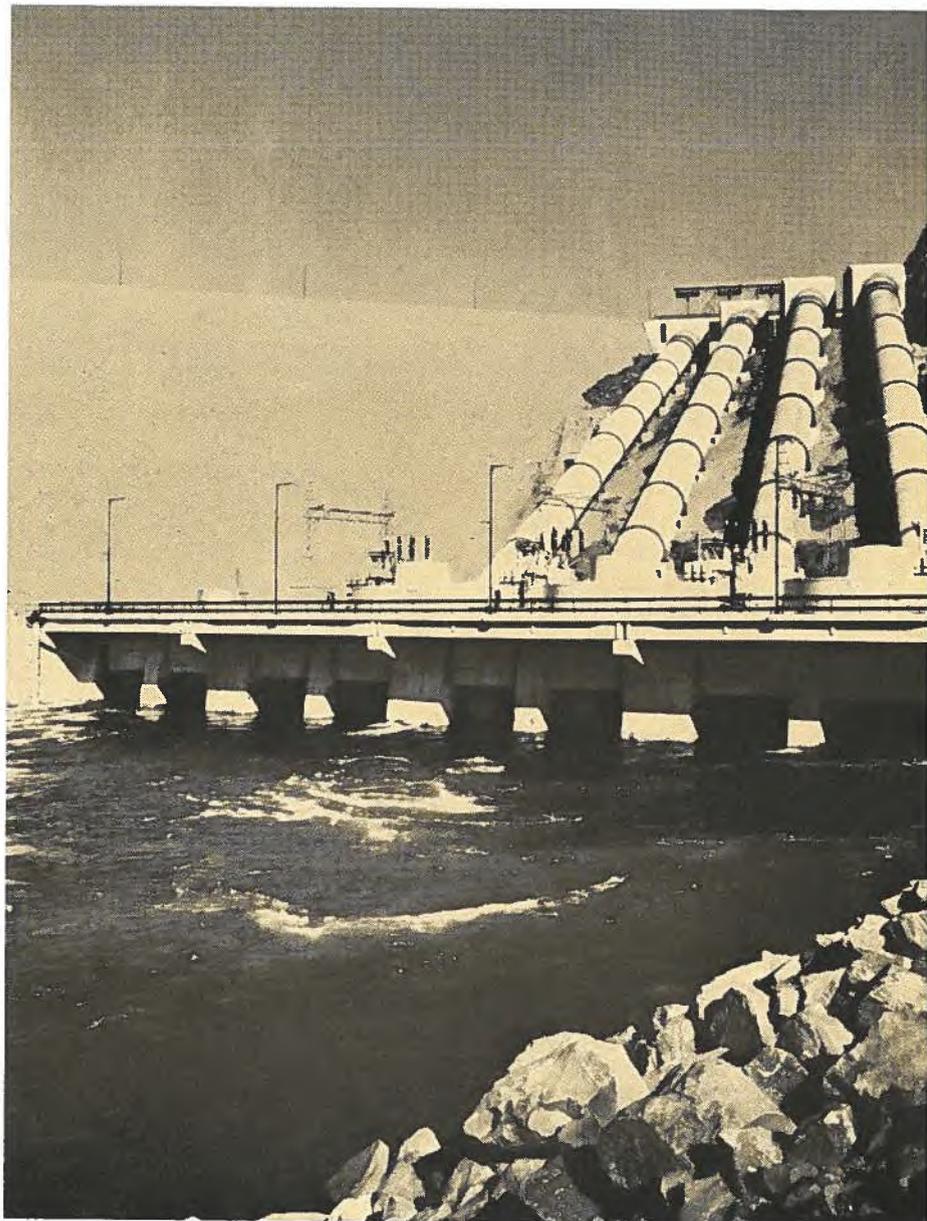
For small routine requirements of materials, machinery and spares, pay-

ment is made from PPC's own funds. However, attractive credit financing terms, bilateral clearing and barter arrangements play an important role in obtaining more substantial contracts. Although PPC purchasing officials are interested in competitive offers, and the technical departments are interested in technical capabilities and performance, the Ministry of Co-ordination is primarily concerned with the country's balance-of-payments situation and in finding new or enlarged outlets for slow-moving or surplus Greek agricultural and industrial products.

Standards—There are no established electrical standards, nor is there a Greek standards organization, but all North American standards and guides, including those published by NEMA, ASA, IEEE and CSA, are known and used. German and British specifications are also used.

Future Requirements—The original 1968-72 program, superseded by the 1969-73 program, which provided for investment of U.S.\$1.01 billion, against U.S.\$543 million in 1964-68, has been revised again to cover actual requirements up to end of 1974, with

The Kastraki plant on the Acheloos River has four 80 Mw. units. This was the first major hydroelectric project undertaken by a consortium of Greek contractors and was commissioned late in 1969. It comprises the second largest dam in Greece.



projections only beyond that date. New projects for commissioning from 1975 onwards must await the completion of the studies on fossil fuel and hydro resources. Emphasis will probably be on hydro generation in view of the large unharnessed potential, but it is possible that a further three 300 Mw. lignite and possibly one or more peat-burning units will be established between 1975 and 1980. The country's first nuclear power reactor (at Lavrion) is still projected but, as indicated above, has recently been given a lower priority than previously. Its commissioning date will now be further delayed, probably beyond 1980.

It is the eventual intention of PPC to link up the north and south transmission line systems now being constructed—that is, Ptolemais-Salonica (150 kv/380 kv, two substations) and Lavrion-Palini/Athens (380 kv, four to five substations). It may also be necessary to extend the line to Larimna in central Greece, with necessary sub-

stations, to serve the needs of important nickel mines in that location. These projects were recommended in studies carried out in 1968/69 covering a total of 820 miles of transmission line and 81 substations for the period 1968-72.

The main considerations in obtaining contracts covering engineering services, equipment supply or turnkey projects are competitive prices and attractive credit-financing facilities. Other inducements help, such as willingness to accept Greek agricultural and industrial products (tobacco, currants, citrus fruit, fertilizers and textiles) in full or part payment. Engineering services and major capital equipment requirements for all large power projects in Greece since 1951 have been supplied on this basis from West Germany, U.S., France, Italy, Austria, Japan, the U.S.S.R. and other Eastern Bloc countries. Local branch offices and representation, servicing facilities, and technical assistance are

useful aids to obtaining business but are definitely supplementary to competitive prices and attractive financing terms.

Although it is not essential, it is definitely advisable for Canadian equipment manufacturers and consulting engineers to appoint Greek agents familiar with local conditions, or to set up branch offices in Athens. There are well-qualified and experienced local firms able to offer their services to Canadian manufacturers not yet represented in Greece. Where engineering or turnkey projects are involved, it is definitely advantageous to form associations with Greek engineering and construction firms. This reduces the over-all foreign exchange outlay for the particular project and makes it possible to compete for worthwhile contracts under the electric power development program of the Greek PPC. Interested Canadian firms should contact the office of the Commercial Secretary in Athens for help.

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.

Algeria

D. P. Lindores, Assistant Commercial Secretary in Paris, France, will visit Algeria February 22-March 6.

Angola, Madagascar, Mauritius, Reunion

Officers of the Johannesburg, South Africa, office will make visits as follows:

Angola—G. P. Orban, Assistant Trade Commissioner, March 15-19.

Mauritius, Reunion, Madagascar—M. A. Brault, Assistant Trade Commissioner, March 25-31, April 1, April 2-6.

Bulgaria, Hungary, Romania

Trade Commissioners in the Vienna, Austria, office make frequent visits to

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

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.

Dominican Republic, Haiti, Virgin Islands

Trade Commissioners from San Juan regularly visit the Dominican Republic, Haiti and the Virgin Islands. Cana-

dian businessmen who would like officers to undertake assignments for them in these countries are invited to write to the Consulate in San Juan.

Norway

J. R. Caux, Commercial Secretary in Oslo, Norway, will visit Kristiansand, Stavanger and Bergen March 18-27.

South Korea

Trade Commissioners from the Toyko, Japan, office visit the Republic of Korea (South Korea) approximately every two months for a week.

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.

Foreign Trade Service Abroad

➔ The arrow beside an office address or territory listing indicates that there has been a change since the directory was last published.

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Assistant Commercial Secretary
(Agriculture)

P. J. Gibeau
Assistant Commercial Secretary

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W. B. Zyla
Commercial Secretary

A. J. Stewart
Assistant Commercial Secretary

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Capital Territory, Northern Territory,
and Dependencies

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Commercial Counsellor for Canada

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R. A. Groundwater
Assistant Commercial Secretary

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Western Australia, Tasmania

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W. E. Magee
Assistant Commercial Secretary

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*The Canberra office handles only those trade inquiries that require liaison with federal government departments and agencies.

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G. D. Valentine
Commercial Secretary

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SAO PAULO

**Consul and Trade Commissioner
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São Paulo, Brazil**

P. A. Théberge
Consul and Trade Commissioner

J. H. Treleven
Vice Consul and
Assistant Trade Commissioner

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Telex: 021269 (CANADIAN SPO)

*Businessmen are advised to send only letters to this address. To ensure prompt arrival of parcels of any kind, the sender should consult the Sao Paulo office first about the best method to use.

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G. E. Blackstock
Commercial Counsellor

*K. D. Taylor
Commercial Counsellor

T. D. McGee
Commercial Counsellor

T. Charles
Commercial Secretary (Timber)

J. C. Bradford
Commercial Secretary

D. B. Browne
Assistant Commercial Secretary

B. M. White
Assistant Commercial Secretary

G. M. Deyell
Assistant Commercial Secretary

H. G. Garland
Attaché (Fisheries)

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A. B. Brodie
Trade Commissioner

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T. G. Tait
Commercial Secretary

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Gabon, Congo (Brazzaville), Burundi,
Rwanda

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D. S. M. Baker
Commercial Secretary

Cable: DOMCAN PRAGUE
Phone: 32-71-24, 26, 31, 32
Telex: 11061 (DOMCAN PHA)

DENMARK

Commercial Counsellor
Canadian Embassy
Prinsesse Maries Allé 2
Copenhagen V, Denmark

A. W. Evans
Commercial Counsellor

Cable: CANADIAN
Phone: 31 33 06
Telex: 5036 (DOMCAN KH)
Territory:
Greenland

EUROPEAN COMMUNITIES

Mission of Canada to the European
Communities
Canadian Embassy
rue de la Science, 35
B-1040 Brussels, Belgium

A. R. A. Gherson
Deputy Head

G. F. Mintenko
Counsellor

Miss V. F. Wightman
First Secretary

F. L. N. Villeneuve
Second Secretary

Cable: CANADIAN
Phone: 13.38.50
Telex: 21613 (DOMCAN BRU)

Territory:
European Economic Community, European
Atomic Energy Community, European Coal
and Steel Community

FRANCE

Minister-Counsellor (Commercial)
Canadian Embassy
35 Avenue Montaigne
Paris 8^e, France

C. T. Charland
Minister-Counsellor (Commercial)

F. G. Beaudette
Commercial Secretary (Agriculture)

D. E. F. Taylor
Commercial Secretary (Timber)

D. P. Lindores
Assistant Commercial Secretary

A. C. Perron
Assistant Commercial Secretary

P. L. Duchastel
Assistant Commercial Secretary

Cable: CANADIAN PARIS

Phone: 225-99-55

Telex: 28806 (DOMCAN A PARIS)

Territory:

Algeria, Andorra, Monaco

GERMANY

BONN

Commercial Counsellor
Canadian Embassy
Friedrich-Wilhelmstrasse 18
53 Bonn, West Germany

R. R. Parlour
Commercial Counsellor

R. Frenette
Assistant Commercial Secretary

Cable: CANADIAN

Phone: 231061

Telex: 886421 (DOMCA D)

Territory:

States of Baden-Wuerttemberg, Bavaria,
Hesse, Rhineland-Palatinate, Saar;
West Berlin

DUESSELDORF

Consul General and
Senior Trade Commissioner
Canadian Consulate General
Koenigsallee 82
4 Duesseldorf 1, West Germany

G. A. Browne
Consul General and
Senior Trade Commissioner

R. H. Dorrett
Consul and
Trade Commissioner

A. E. Grant
Consul and
Assistant Trade Commissioner

J. N. Ferland
Consul and
Assistant Trade Commissioner

Cable: CANADIAN

Phone: 320525

Telex: 8587144 (DMCN D)

Territory:

State of North Rhine-Westphalia

HAMBURG

Consul General
Canadian Consulate General
Esplanade 41-47
2000 Hamburg 36, West Germany

E. H. Maguire
Consul General

D. S. Armour
Consul and
Trade Commissioner

Cable: CANADIAN

Phone: 351805

Telex: 215555 (DMCNH D)

Territory:

City States of Bremen and Hamburg;
States of Lower Saxony and Schleswig-
Holstein

GREECE

Commercial Secretary
Canadian Embassy
31 Vassilissis Sophias Avenue
Athens 138, Greece

P. D. Donohue
Commercial Secretary

Cable: CANADIAN ATHENS

Phone: 714-041

Telex: 5584 (215584 DOM GR)

GUATEMALA

Commercial Secretary
Canadian Embassy
Apartado 3A (airmail), 4A (seamail)
Edificio Etisa, Plazuela Espana
7a Avenida 12-19, Zone 9
Guatemala City, Guatemala, C.A.

D. J. Browne
Commercial Secretary

A. L. Lyons
Assistant Commercial Secretary

Cable: CANADIAN

Phone: 61560, 67227, 61005

Telex: 206 (DOMCAN GU 206)

Territory:

Costa Rica, El Salvador, Honduras,
Nicaragua, Panama, and Canal Zone

HONG KONG

Senior Canadian Government Trade
Commissioner
P.O. Box 126
P & O Building, 11th Floor
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C. R. Gallow
Senior Trade Commissioner

J. L. Swanson
Trade Commissioner

M. C. J. Lemieux
Assistant Trade Commissioner

Cable: CANADIAN

Phone: 224087

Telex: HX 3391 (DOMCAN HX 3391)

Territory:

Cambodia, Macao, Vietnam

INDIA

Commercial Counsellor for Canada
P.O. Box 11
13 Golf Links Road
New Delhi 1, India

L. J. Taylor
Commercial Counsellor

D. G. Adam
Assistant Commercial Secretary

Miss P. M. Marsden
Assistant Commercial Secretary

Cable: CANADIAN

Phone: 61-8254

Telex: 346 (DOMCAN DLI)

Territory:

Bhutan, Nepal, Sikkim

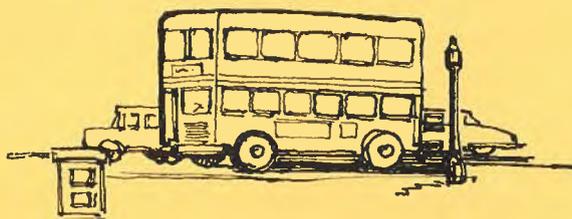
INDONESIA

Commercial Secretary
Canadian Embassy
Djalan Budi Kemuliaan No. 6
Djakarta, Indonesia

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Commercial Secretary

Phone: O.G. 47841

Telex: 011-4345 (DOMCAN DKT 4345)



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Canadian Embassy
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Bezrouke Building
Corner of Takht Jamshid Avenue and
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Tehran, Iran

D. H. M. Branion
Commercial Secretary

G. C. Lambert
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Cable: CANTRACOM
Phone: 613560, 4-9291
Telex: 2337 (DOMCAN TN)

IRELAND

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66 Upper O'Connell Street
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Canadian Embassy
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84 Hahashmoniam Street
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R. E. Pedersen
Commercial Secretary

G. Bruneau
Assistant Commercial Secretary

Cable: CANADIAN
Phone: 267121
Telex: 740 (DOMCAN TV)
Territory:
Cyprus



ITALY

ROME

Minister-Counsellor (Commercial)
Canadian Embassy
Via G. B. De Rossi 27
00161 Rome, Italy

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Minister-Counsellor (Commercial)

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Commercial Counsellor (Agriculture)

C. Renaud
Commercial Secretary

D. S. Wright
Assistant Commercial Secretary

Cable: CANADIAN
Phone: 864-327
Telex: 61056 (DOMCAN ROME)

Territory:
Provinces of Toscana, Marche, Umbria,
Lazio, Abruzzi-Molise, Puglia, Campania,
Basilicata, Calabria, Sicilia, Sardegna.
Other countries: Libya, Malta

MILAN

Consul General and Trade Commissioner
Canadian Consulate General
C.P. 3977
Via Vittor Pisani 19
20124 Milan, Italy

R. K. Thomson
Consul General and
Senior Trade Commissioner

V. G. Lotto
Consul and Trade Commissioner

M. C. Spencer
Consul and Assistant Trade Commissioner

F. Pillarella
Vice Consul and
Assistant Trade Commissioner

Cable: CANTRACOM
Phone: 652-485/652-600
Telex: 31368 (CANTRACOM MILAN)

Territory:
Provinces of Emilia-Romagna, Lombardia,
Piedimonte, Trentino-Alto Adige, Veneto,
Liguria, Trieste, Valle D'Aosta, Friuli-
Venezia

IVORY COAST

Commercial Secretary
Canadian Embassy
P.O. Box 21194
Le General Building
Cor. Avenue du Commerce et
Bottreau-Roussel Plateau
Abidjan, Ivory Coast

J. P. Bell
Commercial Secretary

J. Filion
Assistant Commercial Secretary

Cable: DOMCAN ABIDJAN
Phone: 32-20-09
Telex: 593 (DOMCAN ABIDJAN 593)

Territory:
Guinea, Liberia, Mali, Mauritania, Niger,
Senegal, Upper Volta

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Office of the High Commissioner for
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Tobago Road
Corner Trafalgar Road and Knutsford
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Kingston 10, Jamaica

A. Blum
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J. H. Lang
Assistant Commercial Secretary

J. P. Lefebvre
Assistant Commercial Secretary

Cable: CANADIAN
Phone: 65726
Telex: KGN 30 (BEAVER KINGSTON)

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

JAPAN

Minister (Commercial)
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Akasaka Post Office
Tokyo 107, Japan

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Minister (Commercial)

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Commercial Counsellor

C. D. Caldwell
Assistant Commercial Secretary

F. M. Galbraith
Assistant Commercial Secretary

P. G. Campbell
Assistant Commercial Secretary

S. J. Kaufmann
Assistant Commercial Secretary

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

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Industrial Promotion Services Building
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Nairobi, Kenya

R. Archambault
Commercial Secretary

A. Bouchard
Assistant Commercial Secretary

Cable: DOMCAN NAIROBI
Phone: 27426
Telex: 22198 (DOMCAN NRB)

Territory:
Ethiopia, Malawi, Somali Republic,
Tanzania, Uganda, Zambia

LEBANON

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

F. I. Wood
Commercial Counsellor

S. B. McDowall
Commercial Secretary

J. J. Y. Trepanier
Assistant Commercial Secretary

Cable: CANADIAN

Phone: 250955

Telex: 20652 (DOMCAN BERYT)

Territory:

Iraq, Jordan, Kuwait, People's Democratic Republic of Yemen (Aden), Persian Gulf area, Saudi Arabia, Syria, Trucial States, Yemen Arab Republic

MALAYSIA

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Commercial Secretary

C. H. Cummer
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Cable: DOMCAN

Phone: 89722/4

Telex: KL/TX279 (DOMCAN 8209 KN)

Territory:

Brunei, Burma

MEXICO

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Melchor Ocampo 463, 7th Floor
Mexico 5, D.F., Mexico

T. F. Harris
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J. N. Grantham
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A. T. Gjernes
Assistant Commercial Secretary

Cable: CANADIAN

Phone: 533-14-00

Telex: 017-71-191 (DOMCAN MEX)

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M. J. Hladik
Assistant Commercial Secretary

Cable: DOMCAN Wellington

Phone: 70-644

Telex: 065-3505 (DOMCAN NZ 3505)

Territory:

Cook Islands, French Oceania, Gilbert and Ellice Islands, Tahiti, Tonga, Western Samoa

NIGERIA

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Lagos, Nigeria

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Commercial Secretary

C. M. J. Courtemanche
Assistant Commercial Secretary

Cable: CANADIAN

Phone: 53630

Telex: 21275 (DOMCAN LAGOS)

Territory:

Dahomey, Gambia, Ghana, Sierra Leone, Togo

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Postuttak
Oslo 1, Norway

J. R. Caux
Commercial Secretary

Cable: CANADIAN

Phone: 46.69.55

Telex: Oslo 11880 (11880 DOMCAN)

Territory:

Iceland

PAKISTAN

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Hotel Shahrazad
Islamabad, Pakistan

A. D. McArthur
Commercial Secretary

H. W. Guy
Assistant Commercial Secretary

Cable: CANADIAN

Phone: 21101-04

Telex: 875 (DOMCAN IBA)

Territory:

Afghanistan

PERU

Commercial Secretary
Canadian Embassy
Casilla 1212
Edificio El Pacifico
Corner Avenida Arequipa and Plaza Washington
Lima, Peru

M. R. Bell
Commercial Secretary

J. D. Leach
Assistant Commercial Secretary

Cable: CANADIAN

Phone: 287420

Telex: WLA 5323 (DOMCAN PX 5323)

Territory:

Bolivia

PHILIPPINES

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Canadian Consulate General
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1414 Roxas Boulevard
Manila, Philippines

F. B. Clark
Consul General and Senior Trade Commissioner

B. A. Gagosz
Consul and Trade Commissioner

C. R. Mann
Vice Consul and Assistant Trade Commissioner

Cable: CANADIAN

Phone: 50-20-76, 77, 78

Telex: 3252 (DOMCAN PN 3252)

POLAND

Commercial Secretary
Canadian Embassy
Matejki 1/5
Srodmiescie
Warsaw, Poland

H. R. Wilson
Commercial Secretary

Cable: DOMCAN WARSAW

Phone: 17-60-41

Telex: 813424 ("813424 CANAPL")

PORTUGAL

Commercial Counsellor
Canadian Embassy
Rua Rosa Araujo, 2-7°
Seventh Floor
Lisbon 2, Portugal

P. A. Savard
Commercial Counsellor

Cable: CANADIAN
Phone: 56-25-49

Telex: 377 (DOMCAN P)

Territory:
Azores, Cape Verde Islands, Madeira,
Portuguese Guinea

PUERTO RICO

Consul and Trade Commissioner
Canadian Consulate
1606 Pan Am Building
Hato Rey, Puerto Rico 00917

D. I. Campbell
Consul and Trade Commissioner

R. A. Fairweather
Consul and
Assistant Trade Commissioner

Phone: 764-2011 (Area code: 809)
Telex: 3450297 (CANADA 3450297)

Territory:
Dominican Republic, Haiti,
U.S. Virgin Islands

SINGAPORE

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Canada
P.O. Box 845

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Commercial Counsellor

W. L. Clarke
Assistant Commercial Secretary

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Phone: 37-1322

Telex: 277 (DOMCAN SPORE)

SOUTH AFRICA

JOHANNESBURG

Canadian Government Trade Commissioner
P.O. Box 61619 Marshalltown
78 Fox Street
Johannesburg, South Africa

Wm. Jones
Trade Commissioner

M. A. Brault
Assistant Trade Commissioner

G. P. Orban
Assistant Trade Commissioner

Cable: CANADIAN
Phone: 834-6521

Telex: 7189 (43-7189 JH)

Territory:
Provinces of Natal, Orange Free State,
Transvaal. Other countries: Angola,
Botswana, Comoro Archipelago, Lesotho,
Malagasy, Mauritius, Mozambique, Reunion,
Swaziland

CAPE TOWN

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

W. D. Wallace
Trade Commissioner

P. W. Belanger
Assistant Trade Commissioner

Cable: CANADIAN
Phone: 2-5134/5

Telex: 7060 (5-7060 CT)

Territory:
Cape Province. Other countries:
St. Helena

SPAIN

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

H. E. Lemieux
Commercial Counsellor

G. M. Wansbrough
Assistant Commercial Secretary

Cable: CANADIAN
Phone: 247-54-00

Telex: 27347 (DOMCA E)

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

SWEDEN

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

M. B. Bursey
Commercial Counsellor

E. C. H. Shelly
Assistant Commercial Secretary

D. C. Butler
Assistant Commercial Secretary

Cable: CANADIAN
Phone: 23-79-20

Telex: 10687 (10687 DOMCAN S)

Territory:
Finland

SWITZERLAND

Commercial Counsellor
Canadian Embassy
Kirchenfeldstrasse 88
3000 Berne, Switzerland

H. E. Campbell
Commercial Counsellor

R. D. Merner
Assistant Commercial Secretary

Cable: CANADIAN
Phone: 44-63-81

Telex: 32489 (DMCNB CH)

Territory:
Liechtenstein, Tunisia

THAILAND

Commercial Secretary and Consul
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Thai Farmers Bank Building, 7th Floor
142 Silom Road
Bangkok, Thailand

C. E. Rufelds
Commercial Secretary and Consul

D. G. Ryan
Assistant Commercial Secretary
and Vice Consul

Phone: 32956

Telex: 2277 (DOMCAN BKK)

Territory:
Laos

TRINIDAD AND TOBAGO

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72 South Quay
Port-of-Spain, Trinidad

G. H. Musgrove
Commercial Secretary

D. J. McJanet
Assistant Commercial Secretary

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

Cable: CANADIAN
Phone: 37-254

Telex: 226 (DOMCAN WG 226)

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

TURKEY

Commercial Secretary
Canadian Embassy
Vali Dr. Resit Caddesi 52
Cankaya, Ankara, Turkey

D. J. S. Winfield
Commercial Secretary

Phone: 12-24-48

Telex: 69 (DOMCAN ANKARA)

UNION OF SOVIET SOCIALIST REPUBLICS

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

R. H. Gayner
Commercial Counsellor

J. D. Welsh
Commercial Secretary

L. T. Dickenson
Assistant Commercial Secretary

Cable: CANAD

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

Telex: 401 (DOMCAN MSK)

UNITED ARAB REPUBLIC

Commercial Division
Canadian Embassy
Kasr el Doubara Post Office
6 Sharia Rouston Pasha
Garden City
Cairo, United Arab Republic

Cable: CANADIAN

Phone: 23110

Territory:

Sudan

UNITED NATIONS

Permanent Mission of Canada to the United Nations

866 United Nations Plaza, Suite 250
New York, N.Y. 10017

R. J. L. Berlet
First Secretary

P. A. Gagnon
Third Secretary

Cable: CANINUN NYK

Phone: 751-5600 (Area Code 212)

Telex: 00126228 (CANINUN NYK)

UNITED STATES

WASHINGTON

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

W. G. Pybus
Commercial Counsellor

W. F. Hillhouse
Commercial Counsellor (Agriculture)

B. F. Armishaw
Commercial Counsellor

H. C. Armstrong
Commercial Counsellor

J. D. Belisle
Assistant Commercial Secretary

Cable: CANADIAN

Phone: 332-1011 (Area Code 202)

Telex: 0089664 (DOMCAN WSH)

Territory:

U.S. Government and agencies; international organizations with headquarters in Washington

NEW YORK CITY

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Canadian Consulate General
680 Fifth Avenue
New York City, N.Y. 10019

D. S. Armstrong
Deputy Consul General (Commercial)

D. H. Leavitt
Consul and Trade Commissioner

D. T. Wismer
Consul and Assistant Trade Commissioner

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

Phone: 586-2400 (Area Code 212)

Night Line: 586-2321

Telex: 00126242 (DOMCAN NYK)

Territory:

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

BOSTON

Consul and Senior Trade Commissioner
Canadian Consulate General
500 Boylston Street
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W. R. Van
Consul and Senior Trade Commissioner

K. R. Higham
Consul and Trade Commissioner

S. Doyon
Vice Consul and
Assistant Trade Commissioner

Phone: 262-3760 (Area Code 617)

Telex: 0094567 (DOMCAN BSN)

Territory:

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

BUFFALO

Consul and Trade Commissioner
Canadian Consulate
1400 Main Place
396 Main Street
Buffalo, New York 14201

J. H. Bailey
Consul and Trade Commissioner

B. Dussault
Vice Consul and
Assistant Trade Commissioner

Phone: 852-1247 (Area Code 716)

Telex: 9-1329 (DOMCAN-BUF)

Territory: Northern New York State

CHICAGO

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

R. D. Sirrs
Consul and Senior Trade Commissioner

Z. W. Buriannyk
Consul and
Trade Commissioner

K. G. DeWolf
Consul and
Assistant Trade Commissioner

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

Phone: 427-1031 (Area Code 312)

Telex: 00254171 (DOMCAN CGO)

Territory:

States of Illinois, Indiana, Iowa, Missouri, Nebraska, southern Wisconsin.

CLEVELAND

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

D. A. B. Marshall
Consul and Senior Trade Commissioner

F. M. Mulkern
Consul and
Trade Commissioner

C. R. Donley
Consul and
Assistant Trade Commissioner

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

Phone: 861-1660 (Area Code 216)

Telex: 00985364 (DOMCAN CLV)

Territory:

States of Ohio, Kentucky, West Virginia, western Pennsylvania

DALLAS

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

C. M. Forsyth-Smith
Consul and Trade Commissioner

J. A. Langley
Consul and
Assistant Trade Commissioner

R. C. Lee
Consul and
Assistant Trade Commissioner

Phone: 742-8031 (Area Code 214)

Telex: 00732637 (DOMCAN DAL)

Territory:

States of Texas, Arkansas, New Mexico, Oklahoma, Kansas

UNITED STATES

DETROIT

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

J. D. Blackwood
Consul and Trade Commissioner

J. A. Sotvedt
Consul and
Assistant Trade Commissioner

W. B. Schumacher
Vice Consul and
Assistant Trade Commissioner

Phone: 965-2811 (Area Code 313)

Telex: 23-0715 (DOMCAN DET)

Territory:
States of Michigan and Indiana

LOS ANGELES

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

V. B. Chew
Consul and Trade Commissioner

S. F. Pattee
Consul and
Assistant Trade Commissioner

D. M. Lawson
Consul and
Assistant Trade Commissioner

Phone: 627-9511 (Area Code 213)

Telex: 00674119 (DOMCAN LSA)

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

MINNEAPOLIS

Consul and Trade Commissioner
Canadian Consulate
15 South Fifth Street
Minneapolis, Minnesota 55402

G. E. Woollam
Consul and Trade Commissioner

P. W. Aubin
Consul and Assistant Trade Commissioner

Phone: 336-4641 (Area Code 612)

Telex: 29-0229 (DOMCAN MPS)

Territory: States of Minnesota,
North and South Dakota, Montana
(east of the Divide), Northern
Wisconsin, Upper Michigan Peninsula

NEW ORLEANS

Consul and Trade Commissioner
Commercial Division
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2110 International Trade Mart
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W. J. Millyard
Consul and Trade Commissioner

W. M. Maybee
Consul and
Assistant Trade Commissioner

R. Lockhead
Vice Consul and
Assistant Trade Commissioner

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

Telex: 0058237 (DOMCAN NLN)

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

PHILADELPHIA

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

R. V. N. Gordon
Consul and Trade Commissioner

P. J. Gosselin
Consul and
Assistant Trade Commissioner

D. W. R. McTaggart
Consul and
Assistant Trade Commissioner

Cable: CANADIAN

Phone: LOCUST 35838 (Area Code 215)

Telex: 00845266 (DOMCAN PHA)

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

SAN FRANCISCO

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Commercial Division
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J. D. R. Roy
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Assistant Trade Commissioner

Phone: 981-2670 (Area Code 415)

Telex: 0034321 (DOMCAN SFO)

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

SEATTLE

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Sixth and Stewart
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W. A. McKenzie
Consul and
Assistant Trade Commissioner

Roland Goulet
Vice Consul and
Assistant Trade Commissioner

Phone: MUTUAL 2-3515 (Area Code 206)

Telex: 0032462 (DOMCAN SEA)

Territory:
States of Alaska, Idaho, Montana
(west of the Divide), Oregon, Washington

VENEZUELA

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M. C. Pelletier
Assistant Commercial Secretary

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Telex: 22877 (DOMCAN VN)

Territory:
Netherlands Antilles

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Selling Meat and Livestock to Italy

Would-be exporters to Italy must consider three questions carefully before exploiting this market. These are outlined in this report.

UGO BOSCHETTI, Commercial Officer, Milan



Chianina cattle graze the hill pastures of Tuscany. This beef breed is virtually unknown in Canada, although a few have been imported. The Italian beef output has not been keeping pace with consumption, which continues to increase each year.

The trend in meat consumption in Italy in 1970 resembled that in 1969. The down-trend in import prices continued and this constituted a major obstacle to the development of the domestic industry, which has not kept pace with the ever-increasing consumption of beef and veal in Italy. Yet beef and veal make up more than half of the over-all Italian consumption of meat. This is still rather low, only 20.3 kilos per capita, compared with that in other EEC countries. In 1969, wholesale prices for slaughter cattle went up by 0.7 per cent over the same period in 1968. The price of imported pork, on the other hand,

went down by 15.2 per cent and of poultry by 5.2 per cent.

In the first nine months of 1970 the market showed some signs of picking up, with a much larger consumption of pork, beef and veal. Poultry consumption for the full year will certainly exceed that of 1969 (550,000 metric tons); the 1970 estimate is 600,000 tons.

Slaughtering in 1969 of the main species of livestock increased by only 1.5 per cent compared with the same period of the previous year. Of the total meat production that year, by

species, bovine meat accounted for 803,000 metric tons, goat and sheep meat for 42,000, pork for 468,000 and horsemeat for 40,000. Imports of livestock and meat were large in 1969, up slightly over 1968, but imports of fresh and frozen meat marked time and this trend continues. The rise in livestock imports was concentrated mainly on beef cattle, imports of which reached Cdn. \$352 million, 7.5 per cent over 1968. Sheep and goat imports went up 6.4 per cent; those of other animals decreased (horses by 8.3 per cent, hogs by 48.3, and poultry by 17.8 per cent). The very large decrease in hogs arose

because of a temporary situation when imports were cut off to prevent swine plague. Severe measures have been taken to wipe out this disease and the hope is that imports will shortly be resumed.

There are a number of other detailed regulations on the health and the inspection of imported animals and meat, and these can be obtained from the Agriculture, Fisheries and Food Products Branch of the Department of Industry, Trade and Commerce, or from the Trade Commissioner's office in Milan. Potential exporters to Italy should study these closely.

Listed below is information for potential Canadian exporters on the market in Italy for livestock and meat. The rising standard of living there during the past 15 years has brought about a significant change in the eating habits and preferences of Italians and the market for meat is increasing.

Beef cattle—Imports into Italy are rising and Holstein Friesians for breeding are readily accepted. The Italian importer must make sure that imports conform to the health regulations mentioned above, and in addition, he must apply to the Department of Agriculture in Italy for an import authorization. His application must contain all the needed information, such as the genetic traits of the breed, the species, the ages of the animals that he wishes to bring in, and so on. Importers here may also ask for permission to import from Canada other breeds as well as Holstein Friesians, including Herefords, Shorthorn, Charolais, etc. It is up to the Department of Agriculture to decide whether or not these breeds may be imported.

Live Hogs and Boars—There is no pre-established list of breeds that can be imported from Canada, but some species, such as Landrace and Large White, (especially boars) have been brought in from Canada for cross breeding. Because these experiments turned out well, the interest of Italian importers in Canadian herds is expected to increase as soon as government measures against the swine plague are removed. Herds of some other species, such as Lacombe, Yorkshire, and Spot Poland, may



Can the camera lie? Is this pig taking final revenge? Italian slaughterhouses, after all, produced 468,000 metric tons of pork in 1969. Canadian swine have proved successful in cross-breeding experiments, and interest in them may soon increase.

also receive some attention from Italian importers.

Veal and Beef—Veal is still the meat that most Italians prefer. Major imports of veal for direct consumption consist of hindquarters; the meat industry itself imports forequarters for canning or transformation into sausages. Fresh and chilled veal is coming in mainly from EEC countries, and frozen veal from Argentina, Brazil and Australia. Canadian exporters of veal, if they are able to comply with the health regulations, might be able to win a share of this market because the meat coming from Holstein Friesians is particularly acceptable to Italians because of its tenderness and the whiteness of the flesh. All meat for this market should be "bone in"; the regulations forbid imports of boneless veal. Beef too might be sold by the Canadian exporter; he should bear in mind that the order of preference among Italian consumers is carcasses or halves, forequarters, hindquarters, and bone-in, in that order.

Poultry—The Italian authorities apparently have no intention of relaxing restrictions on imports from any country of parts of poultry, particularly chicken and turkey; only whole birds may be imported. Italian poultry producers have made so much progress that the current market for fresh poultry (particularly chicken broilers and fowl) is competitive to

the point where producers are sometimes forced to sell below cost.

Italians prefer broilers and larger chickens to other kinds of poultry, such as turkey. Only 1,550 metric tons of whole turkey were imported out of the 12,000 metric tons consumed in Italy. The only possible marketing opportunity for Canadians might be selling turkeys to the supermarkets. These stores, however, do not make regular purchases but only buy for special holidays, mainly in the winter and spring. Most Italians eat turkey only once or twice a year. The supermarkets usually sell broiler turkeys ranging from six to eight pounds; poultry importers buy the so-called "commercial" turkeys of lower quality to be cut, packed and sold to retailers.

Canadian exporters interested in building up substantial orders for livestock or meat here must first answer three questions:

1. Am I in a position to conform to the Italian health regulations?
2. Am I competitive in price?
3. Can I make deliveries within a reasonable time?

If he can answer yes to all these questions, both for livestock and for meat, there is a market for him to exploit in Italy.

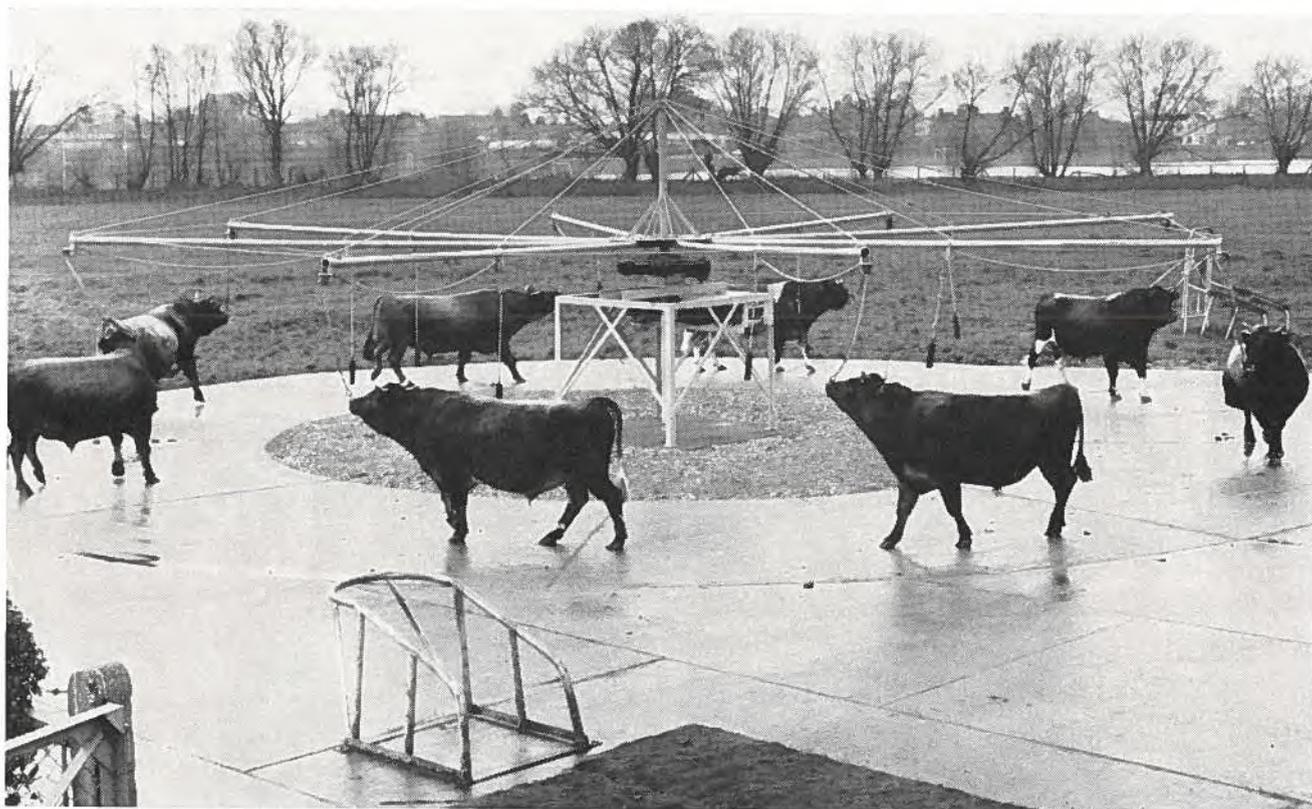
ITALIAN IMPORTS OF MEAT AND LIVESTOCK 1969

Type and main suppliers	Volume	Value Cdn.\$	Type and main suppliers	Volume	Value Cdn.\$
IMPORTS OF LIVESTOCK				Metric tons	
Horses	185,825	29,723,000	Poultry	6,678	7,117,000
purebred	435		baby chicks	352	
of which			of which		
Britain	143		Netherlands	237	
France	70		Britain	32	
for slaughter and other uses	185,390		United States	23	
of which			other	6,326	
Yugoslavia	108,966		of which		
Poland	21,713		Netherlands	5,914	
Hungary	9,881				
Cattle	1,956,221	352,884,000	IMPORTS OF MEAT		
dairy and breeding cattle	59,228		Beef and Veal	226,405	272,767,000
of which			fresh chilled	202,353	
Austria	43,275		of which		
Switzerland	4,340		Denmark	45,655	
Denmark	4,097		Netherlands	34,968	
Canada	1,556		Yugoslavia	26,585	
beef cattle	1,896,993		West Germany	17,578	
of which			frozen	58,615	
West Germany	451,805		of which		
France	416,012		Argentina	24,052	
Poland	194,497		Uruguay	13,060	
Hungary	196,040		Eastern Europe	9,699	
Hogs	123,002	5,175,000	Brazil	7,917	
purebred	2,453		Pork		72,542,000
for slaughter	120,549		fresh chilled	29,472	
of which			of which		
West Germany	65,939		Netherlands	16,171	
Romania	24,966		Yugoslavia	4,989	
Bulgaria	10,746		Denmark	3,191	
Sheep	1,039,313	14,683,000	frozen	43,102	
purebred	63		of which		
for slaughter	1,039,250		Eastern Europe	12,090	
of which			Sweden	9,870	
Hungary	503,925		Belgium	4,737	
Bulgaria	309,109		Netherlands	4,491	
West Germany	105,360		Mutton (fresh, chilled, frozen)	7,313	7,033,000
Goats	6,925	50,000	Poultry (fresh, chilled, frozen)	5,029	4,450,000
			of which		
			Netherlands	1,067	
			Hungary	1,077	
			United States	931	

Britain's Livestock and Poultry Industry

This review of British production and imports of cattle, pigs, poultry and their meat should help Canadian exporters to assess their chances in this big market.

B. M. WHITE, Assistant Commercial Secretary (Agriculture), London



With the surplus of dairy products in the Common Market countries, more and more British farmers are turning to beef or dual-purpose breeds. Here bulls are seen using a mechanical exerciser on a farm in Gloucestershire.

The question of British accession to the EEC today is influencing much of the agricultural activity here. Whatever the outcome of the negotiations, it is this agricultural sector, and especially British farmers themselves, who will have gained most from the British approach to the Common Market. The realization of the effect of membership in the EEC has generated action directed at improving farm efficiency. It is, of course, a moot point whether these improvements would have been undertaken as rapidly without the shadow of the EEC looming ahead.

Cattle—No branch of British agriculture has seen more activity than the cattle industry. Dairy farmers here are well aware of the surplus of fresh milk and dairy products in Europe. To many, the future of dairying is not bright; from March 1968 to March 1969 over 5,000 British dairy farmers went out of business. In the first quarter of 1970, at least 1,390 more followed suit in England and Wales alone. Some have put their land to other uses, such as cereal or beef production. Many were marginal farmers at best who were bound to quit eventually.

However, there is no escaping the fact that there is no place in British dairying today for anyone unwilling to devote his full attention to it and to adopt the most up-to-date methods. This situation has forced many dairy farmers to make a basic decision—a decision important to Canadian exporters of purebred dairy cattle. With rising beef consumption in Europe, that perennial debate on whether the farmer should breed a dual-purpose animal or specialize in either beef or milk production has received fresh fuel. Judging from recent imports, the

British farmer seems to have decided on the dual-purpose animal. Imports of West German and Swiss Simmental and of the French Limousine last year testify eloquently to this fact. These breeds are now undergoing tests here.

Because 50 per cent of all British home-produced beef is supplied by the British Friesian, imported breeds inevitably are compared with it and/or crossed with it. Canadian Holstein Friesian breeders, who have for so long maintained that their animals should not be neglected as an important source of meat, will be pleased with an experiment conducted in England, the results of which have just been released. At the Milk Marketing Board's Warren Farm, recent trials showed that farmers who sell cattle by Canadian Holstein sires are likely to do better if they sell on the hoof. Steers sired by the Canadian bull were compared with those sired by British Friesian bulls. The Canadian-sired cattle appeared rangier on the hoof;

this was confirmed by the carcass measurements. Although these features are traditionally considered to reflect poor carcasses, all the carcasses were in fact graded and realized the same price per pound deadweight. Both groups produced carcasses with similar yields of hind- and fore-quarters, and the proportion of boneless prime cuts and percentage of bone did not show any significant difference.

Another result of the trial was the fact that 91 calves reared on the barley beef system to a live weight of 900 pounds showed no real difference in live-weight gain from 90 pounds to slaughter; it was 2.67 pounds per day for British-sired calves and 2.74 pounds per day for Canadian-sired. The milk yield progeny test results from the Holsteins are expected in the spring of 1971.

The Canadian exporter of Holstein Friesians will appreciate the importance of the Warren Farm trials to his efforts to sell in a market conscious of dual-purpose animals. If the majority of the farmers in Britain want an animal that produces both milk and beef in abundance, then these results should make them look with more favor on the Canadian animal, already known for its high milk yields.

More significant, perhaps, is still another British trial just begun and involving Canadian Holsteins. This time it pits purebred Holstein Friesian bull calves against purebred British Friesian bull calves; both groups are of commercial standard. The Meat and Live-stock Commission is sponsoring this

trial with the co-operation of several breeders of Canadian Holstein Friesians in the Cheshire area. Seventy-five bull calves of each breed have been consigned to selected breeders who have previously recorded for the MLC. Only animals over 100 pounds and between four and fourteen days old were selected. Some will rear the animals under an intensive feeding program and others under a semi-intensive scheme.

Under the intensive scheme, the animals will be kept indoors until the spring. Both groups will be given the same feed. At approximately 400-500 pounds live weight, the cattle on the semi-intensive scheme will be turned out for fairly intensive grazing, ideally in a paddock grazing system. In the autumn, at about 750 pounds live weight, they will be returned indoors and finished on a high roughage, concentrate-supplemented diet. When they reach 1,000 pounds live weight, they will be slaughtered. The trial, which

TABLE 1

CANADIAN EXPORTS OF DAIRY CATTLE TO BRITAIN

	Number	Value Cdn. \$
1966	23	19,800
1967	1	1,000
1968*	658	299,000
1969	58	29,000
1970 (Jan-July)	3	4,000

*The high figures are the result of the need to replace cattle after the hoof and mouth epidemic.

TABLE 3

BRITISH IMPORTS OF POULTRY AND POULTRY PRODUCTS*

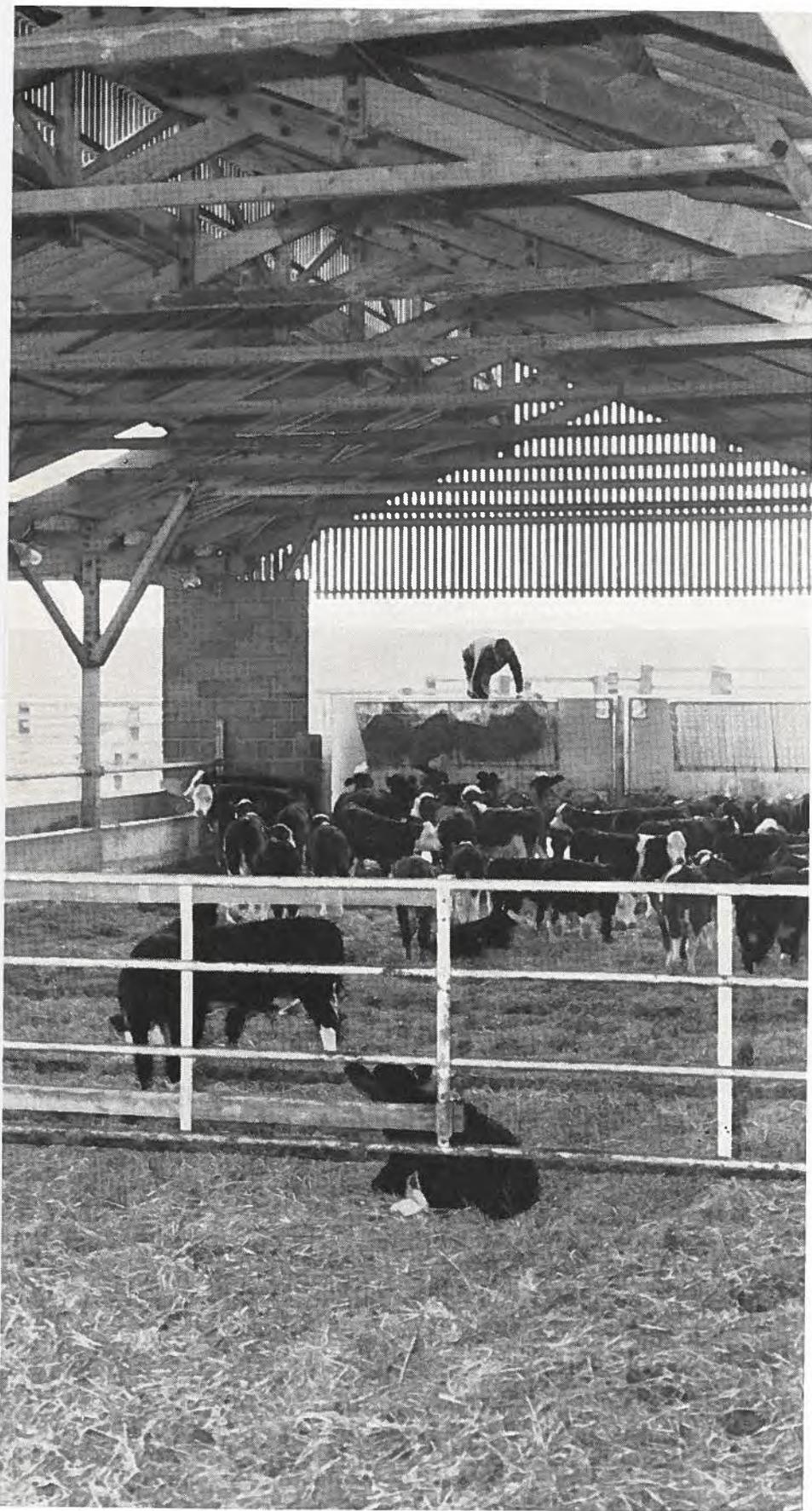
	Quantity tons	Value Cdn. \$'000
1966	6,030	7,000
1967	6,290	7,500
1968	4,598	6,000
1969	4,128	6,112
1970 (Jan.-Aug.)	2,200	3,200

*Poultry in airtight containers; poultry products in airtight containers or otherwise.

TABLE 2

EXPORTS OF SELECTED CANADIAN MEAT PRODUCTS TO BRITAIN

	Fresh or frozen									
	Beef		Pork		Horsemeat		Edible Offals		Other Meat	
	'000 cwt	Cdn. \$'000	'000 cwt	Cdn. \$'000	'000 cwt	Cdn. \$'000	'000 cwt	Cdn. \$'000	'000 cwt	Cdn. \$'000
1963	—	—	1.4	71	—	—	90.3	2,144	8.0	129
1964	1.0	49	5.5	228	0.2	0.2	156.0	3,581	5.9	66
1965	0.9	80	0.5	12	0.2	4	213.3	4,553	9.4	107
1966	2.0	248	.08	2.7	3.0	69.9	170.0	4,586.0	9.0	158.0
1967	0.65	120	6.6	263	.69	14.1	175.0	3,772.0	1.4	24.2
1968	0.96	110	7.5	323	8.2	152.7	212.5	4,130.0	9.0	68.2
1969	0.13	14	—	—	8.3	151	182.5	3,967	1.5	15.8
1970 (Jan-July)	0.19	26.5	0.48	2.4	5.0	101.0	122.0	2,892.6	1.1	14.5



Young cattle in one of the fattening yards at Warren Farm, owned by the Milk Marketing Board. Experiments here with progeny from Canadian bulls have shown results that have great meaning for Canadian breeders of Holstein cattle.

will last 18 months, is designed to show that the purebred Canadian animal compares favorably in rate of growth and meat/fat ratio with its British cousin.

If the outcome proves favorable to the Canadian animal, it will be a source of satisfaction to the small band of Holstein Friesian breeders in Britain who have boosted the breed for years. Our exporters should follow this trial carefully and use any positive results to strengthen their sales efforts.

The use of artificial insemination in England and Wales during the last 25 years has grown from nil to a record 1,798,000 doses during the year ended March 1970. The insemination industry is keeping pace with the times, both in high prices for top bulls (recently one A.I. group paid \$100,000 for a four-month-old Canadian Holstein bull calf) or modern technology (one A.I. group has installed "Robophones" in each of its 91 centers to record night calls requesting semen services). The advanced state of the semen industry should be gratifying to Canadian exporters of frozen semen. Insemination expertise in Britain assures Canadian exporters of greater acceptance of their semen. The exporter is not frustrated by having the blame put on the semen instead of the inseminator, as it is in some countries only now adopting artificial insemination as a breeding technique. Canadian Guernsey, Ayrshire, Holstein Friesian and Charolais semen is being imported into Britain. If the results of the MLC trials are favorable, we can expect an increase in imports of semen of the Holstein Friesian breed.

Another recent development is benefiting Canadian semen exporters. A one-man delegation from the British Ministry of Agriculture, Fisheries and Food toured Canada, with the express purpose of determining which of a list of Canadian bulls could qualify for semen export to Britain. As a result of this visit, the British Ministry, impressed with Canadian record-keeping practices and with our health standards, will require the following:

1. The classification report of the bull and those of his dam and sire.
2. Classification reports on other near relatives, such as half-sisters.

3. Extended pedigree showing production of female relatives.

4. A veterinary report as a safeguard against defective jaw or genital organs in the donor bull.

This will be sufficient to allow the import of Canadian semen from dairy bulls of the Holstein Friesian, the Ayrshire, the Guernsey and the Jersey breeds without an inspection visit to Canada by an official of the British Ministry whenever a purchase of semen from an unauthorized bull is desired. Costs will decrease because the importer will not have to pay transportation for the official. This development will lead to a longer list of Canadian dairy bulls whose semen can be shipped to Britain, but there will be a limit of 750 doses until such time as the bulls have been progeny-tested in Britain. A similar acceptance of our beef breeds is being considered by the British authorities. If Canadian exporters monitor developments here and work closely with those breeders now buying Canadian, they should find Britain a market well worth their efforts.

Swine—The last few years have seen a marked change in the pig industry also. From June 1963 to June 1968, the average pig unit increased from 51 to 87 pigs per holding, but the number of holdings with pigs fell from 111,000 to 73,000. June 1970 holdings are set at 65,000 and by 1972 this may be down to 55,000. Rising from the ashes is a new approach to pig-raising. Large industrial companies with diverse holdings are now buying into the industry and vertically integrating it. This movement is similar to the activity in the local poultry industry.

In spite of this rationalization, British importers of meat products are watching developments in the Canadian pig industry closely. They carefully review price information and try to project the effects of the Canadian oversupply. In fact, several firms feel that prices have reached a level that makes imports profitable and have placed orders in Canada. Thus far, the shipments have been of pork legs (gammons). Offals, both beef and pork but particularly pork, are in great demand. The trade considers Canadian offals to be the best and much more could be sold if the supplies were forthcoming. Our present sales of offals to Britain

are worth approximately \$4 million a year, making them our major meat export. The next most important meat sold by Canada is horsemeat destined for the pet-food industry. Our beef prices are too high for Britain and our export sales are practically nil.

The trade is mainly in the hands of large wholesalers and importers/packers, some of whom have plants in Canada. Pork and beef are usually handled by the same traders. Though the meat trade's buying connections with Canada are of long standing, new sources of supply are welcome. The smaller Canadian packers wishing to enter this market could sell through meat brokers in Canada who consolidate supplies from several packers and make offers to British firms. Large packers can offer directly and their submissions will be welcome. Competition, however, is keen, especially from the Netherlands, Poland, Yugoslavia and Denmark.

A recent experiment involving Canadian and British pigs may have repercussions on the Canadian cattle industry. Three healthy pigs were born in England though their parents were in Canada at the time of birth. Fertilized eggs were transferred from the Canada Department of Agriculture's Animal Diseases Research Institute at Hull to its British counterpart research unit at Weybridge, England. Thirty-four fertilized eggs were placed in a foster mother at Weybridge. The result was three healthy pigs. Though the success rate was about 9 per cent, it is felt that future experiments may achieve a higher birth rate.

Scientists are hoping to achieve inter-continental transfer of cattle eggs. Benefits of such a scheme are obvious. The importer could specify not only the bull but also the cow, and this opens up a new dimension in cattle breeding. The project will be watched with enthusiasm by breeders throughout the world.

Poultry—Britain offers only a small market for processed cooked poultry products from Canada. Local poultry production is steadily increasing—up to 350 million birds are expected this year—and imports are decreasing. Fowlpest has reared its ugly head again and now is reaching epidemic proportions in some parts of the country. The

latest figures set the mortality rate at 4 million out of a total of 350 million birds.

About 85 per cent of production in the broiler industry is in the hands of ten firms. In descending order, the more important companies heavily involved in the poultry field are: Imperial Tobacco group, Eastwoods, Fitch Lovell group, and Swift & Co. These are highly rationalized operations planned to effect maximum economies of scale. Besides the keen British competition, another fact militates against Canadian sales: uncooked poultry products from Canada are not permitted entry for health reasons; only our fully cooked poultry meat can be imported. Listed below are some of the products with the greatest export potential for Canadian poultry processors. These include: large packages of white and dark poultry meat (between 11 and 22 pounds) destined for the pie and soup manufacturers; dehydrated chicken powder for the soup manufacturers; turkey rolls for the catering trade, and cooked chicken breasts.

The main trade is in the hands of a few large companies which combine extensive distribution networks with facilities for handling frozen foods or of firms specializing in processed poultry products.

A study of United States exports of poultry products for 1969 and 1970 shows nearly 650,000 pounds, worth Cdn.\$620,000, sold to Britain from Jan.-Sept. 1969, and 685,000 pounds, worth Cdn.\$820,000, in the same period of 1970. Of these amounts, 441,000 pounds in Jan.-Sept. 1969 consisted of turkey rolls and 622,000 pounds in 1969-70. The remainder of these United States imports consists of turkey breasts and a little whole cooked turkey. These figures should help Canadian producers to assess the market potential. At present Canadian poultry in airtight containers enjoys a 3 per cent duty advantage over United States exports.

A review of the trade statistics on page 29 reveals that the British market for the products discussed in this article is, if not large, worthy of attention and effort. This office will be pleased to help Canadian exporters in their sales efforts.

Austrian Self-Serve Stores Are Winning Customers

With greater buying power and a wider choice of food products, the chains are slowly driving out the independent corner stores. This transition offers opportunities for Canadian suppliers.

P. A. HOLTON, Assistant Commercial Secretary

M. KOVATS, Commercial Officer, Vienna

Until recently, the entire Austrian retail food trade consisted of small stores, with the owner and his family behind the counter at which customers bought all their needs. Starting at about 6 o'clock in the morning, women came to the store to buy fresh bread, rolls and milk for the family breakfast. Later in the morning, between nine and eleven, they did their second shopping of the day. With more time on their hands, they met their friends and discussed their household problems at the corner store.

But times are gradually changing. New stores are larger and offer a wide range of food and non-food products on a self-service basis. Instead of buying food once or twice a day, housewives are beginning to shop two or three times a week, buying larger quantities at one time. They are being forced to adjust to the lack of personal contact and of informal credit arrangements that they found at the small store, but on balance they are gaining. They can now choose from a wide range of goods from all over the world, sold at reasonable prices.

The smaller stores are open from 6 a.m. until 6:30 p.m. with a three-hour break (usually 12:30 to 3:30 p.m.). The new self-service stores usually open between 8 and 9 o'clock in the morning and close at 6 p.m. The mandatory closing time is 6:30 p.m.

There are about 22,000 retail food stores in Austria, with total annual sales of Cdn.\$1,304 million. The majority of retail stores are still small; in Vienna, with a population of 1.7 million, it is estimated that there are only 50 to 100 self-service stores with an annual turnover of \$1 million or more.



Supermarkets in Austria are a fairly recent happening and not yet as common as in Canada. Shown here is part of the largest one in Austria, on the outskirts of Vienna.

The Austrian retail food trade is developing along two lines; chain stores and co-operatives. At present there are four large food chains with annual sales of \$20 million or more. These are, with number of stores and annual sales: Julius Meinl AG (450; Cdn.\$160 million); Konsumgenossenschaft Wien (350; Cdn.\$120 million); Billa (100; Cdn.\$40 million), and Lova (10; Cdn.\$20 million).

Both Julius Meinl and Konsum do some of their own food processing. Few of these stores would qualify as supermarkets in the North American sense of offering parking space, self-service with more than six check-outs,

and true discount prices. The Meinl stores have no significant price advantages over independent corner stores, but the other three major chains do. In addition, Konsum, Billa, and Lova have started in the last three years to open North American-style discount supermarkets, with prices lower than their normal chain outlets. They offer branded goods and certain staple products at prices 10 to 30 per cent below the regular resale prices recommended by the producers or fixed by the Government (the latter category includes basic bakery and dairy products).

The large stores have been very successful in Vienna, mainly because in

the last five years the automobile and the refrigerator have become normal features of the Viennese household.

Competition from the chains has forced many smaller retail stores to join one of several co-operative societies with commonly owned wholesale organizations operating on a non-profit basis. Recently, activities of the voluntary groups have increased; they now help in the building and financing of new self-service stores, take care of nationwide advertising for bargain sales, and have become powerful organizations successfully encouraging small shop-owners to stay independent.

ADEG (with 3,200 member retailers), A&O, and Spar are the largest groups. Total sales of members of these co-operatives amount to hundreds of millions of dollars. The voluntary chains, however, do not include any supermarkets in the North American sense, and the recent opening of large chain supermarkets with North American features and even lower prices will constitute an additional threat to the voluntaries.

The wholesale trade has 14,200 employees and total annual sales of Cdn.\$ 686.4 million. Gross profit in 1968 was Cdn.\$68.8 million, almost 10 per cent of sales. There are 1,085 wholesale firms, only a minority of which will survive competition in the next decade. Few of them are large enough to be converted into cash-and-carry wholesale enterprises; at the moment, Austria has about 20 or 30 cash-and-carry wholesale shops with an average annual turnover of Cdn.\$2 million. The largest is situated in the northern outskirts of Vienna and has annual sales of Cdn.\$10 million.

The following is a small section of imported goods found in Viennese grocery stores:

Peach halves—from Italy and the United States, 1 lb. at 40 cents; from Australia, 1 lb. 13 oz. at 48 cents

Fruit cocktail—from the United States and Spain, 1 lb. 13 oz. at 60 cents

Frozen chicken—from the Netherlands, the United States and Hungary, 1 lb. at 50 cents to \$1.00

Tomato juice—from Israel and Italy, 1 qt. 4 oz. at \$1.00

Import Duties on Selected Items

Prepared or preserved fish in airtight containers

in oil only: 15 per cent

cooked or smoked, in sauce: AS. 110.00* per 100 kg., plus 10.6 per cent equalization tax

cooked or smoked, in own juice: AS. 90.00 per 100 kg., plus 10.6 per cent equalization tax

fried herring: AS. 360.00 per 100 kg., plus 10.6 per cent equalization tax

Vegetables and fruit, in airtight containers

in vinegar: AS. 210.00 per 100 kg., plus 10.6 per cent equalization tax

preserved peaches: 19.2 per cent plus AS. 160.00 per 100 kg., plus 10.6 per cent equalization tax

mixed fruit: 12 per cent plus AS. 340.00 per 100 kg., plus 10.6 per cent equalization tax

Vegetables, frozen

23.2 per cent, plus 10.6 per cent equalization tax

Dead poultry (temporarily duty-free)

9.1 per cent equalization tax

Tomato juice

AS. 420.00 per 100 kg., plus 10.6 per cent equalization tax

Hard cheese

AS. 560 per 100 kg., plus 10 per cent equalization tax

*25.39 Austrian Schillings=Cdn. \$1.00

It should be noted that the equalization tax applicable to certain items indicated above applies to domestic products as well as to imports.

Herring fillets in sauce—from Germany and Canada, 200 gm. at 20 cents

Sardines—from Morocco, 4 $\frac{3}{8}$ oz. at 14 cents

Pink salmon—from Japan, 7 $\frac{1}{2}$ oz. at 82 cents

Chocolate-covered ants—from Japan, 57 gm. at \$2.16

Ketchup—from Britain, 12 oz. at 52 cents.

This list could be lengthened considerably to include, among other items, biscuits and shortcake from Britain, dry soup from Switzerland, corned beef from Argentina and Bulgaria, cheese from France, Switzerland and Denmark, tomato paste from Portugal, canned shrimp from Greenland and canned ham from Denmark.

Austrian labelling regulations are stringent. Imported canned food products must be marked as follows:

Trade name (e.g. sardines);

Name and address of producing company

Filled weight (in metric system)

Raw weight, also in metric system, at time of packing (i.e. without sauce)

Type of manufacturing process (e.g. sterilized)

Date of packing or storage life, not in coded form.

The new self-service stores, and even many of the smaller independent grocery stores, are usually equipped with up-to-date display cabinets, shelving,

shopping carts, etc. Freezer units from Sweden and cash registers from Britain are much in evidence.

There are several ways to market food products here. Some of the large chains (e.g. Meinl) prefer to import direct from foreign suppliers, but others (Konsum, for instance) do not. If they find interesting foreign products, they authorize independent import agents to handle the whole process of the import and storage of the goods. Other grocery chains (e.g. Billa) or co-operatives (e.g. ADEG, A&O, Spar) import themselves, but use import agents when direct import is uneconomic. Independent retailers buy from wholesalers who, in turn, may import direct or work through specialized import houses.

The time-honored practice of personal calls on wholesalers and chain headquarters, with sample case in hand, remains the most common and effective method of breaking into the market. If these calls are going to be made by a representative from Canada, the Vienna office can assist by recommending contacts and arranging appointments in advance. If you prefer to work through a Vienna agent, we would be happy to make recommendations and help to arrange the initial contact.

The Austrian chains are now actively seeking foreign products. One example of their enthusiasm is the sponsorship of "National Weeks". To use this avenue of promotion, the chain selects and imports a variety of foreign goods from the chosen country, advertises

heavily, and carefully assesses the results. On the basis of a week's experience, they can then decide on which goods to continue importing.

The European food market, fragmented both in structure and taste, has been traditionally difficult to enter, but companies from all over the world are now getting into it. The Vienna office stands ready to help you. We don't claim to be experts in the Austrian food industry, but we would welcome the opportunity to explore it further for Canadian companies who want to invest in it, or supply equipment or products. Send us your inquiries on tariffs or packaging. Ask us about agents and the possibilities for your products. If price and quality are right, Austria is ready to buy from you.

Trade Lines

West Germany to inaugurate inter-city rail service

The German Federal Railways will inaugurate fast train service between Germany's 31 major cities next September. The inter-city trains, of the TEE type, will be luxuriously appointed, fully air-conditioned, and capable of a top speed of 125 mph. The service will operate every two hours on lines between Hamburg and Munich, Hannover and Munich, Hamburg and Basle, Bremen and Munich.

Currently there are 130 cars and 60 electric locomotives being built which will be added to the rolling stock now in use. The new lines comprise stage one of the Federal Railway's program of streamlining Germany's train system before the 1972 Olympic Games in Munich. The second stage will be a second inter-city network connecting another 42 German cities and this will be operating just before the Games begin—Hamburg

New techniques boost Dutch farm output

The new techniques and improved management practices that have been adopted by Dutch farmers to combat the labor shortage allow them to make more intensive use of the soil and of their implements and capital. Although the number of men working in agriculture has fallen since the end of World War II from 525,000 to approximately 250,000, farm production has increased at an annual average rate of 6 per cent in the past two decades. Farm production accounted for almost 10.9 per cent of the GNP in 1969

and exports of agricultural products continue to make a significant contribution to the nation's balance of payments. An additional important factor is the ability of Dutch farmers to keep pace with the continued growth shown in manufacturing industries—The Hague

Caribbean paint firm expands

Lewis Berger (West Indies) Limited will expand its paint manufacturing operation in Jamaica to include the manufacture of resin. The plant will be developed with the help of the Hoechst Organization with which the Berger, Jenson and Nicholson paint group, parent company of Lewis Berger (West Indies) Limited, is associated. The new plant will supply Berger plants throughout the Caribbean—Kingston

Malaysia strengthens rubber industry

Rubber continues as Malaysia's most important industry and the Government is making every effort to strengthen its competitive position in world markets. Technically specified rubbers under the Standard Malaysian Rubber (SMR) Scheme, with their consistent high quality, will make up about 17 per cent of total production in 1970, compared with 15 per cent in 1969. The Government is launching a program to establish plants for processing rubber tapped by smallholders for SMR, and so increase the proportion of SMR production to total production. The quantity of rubber produced per man year of work has increased from 1.25 tons to 2.27 tons in the period 1956 to 1968.

Greater production volume and better harvesting and processing efficiency should help to keep rubber competitive and reasonably profitable—Kuala Lumpur

Mexico increases cotton plantings

The Mexican Government recently announced that it will step up cotton plantings for the 1971-72 crop year and make more financing available to growers. A minimum of 550,000 hectares will be planted, with production expected to reach about two million bales. Plantings during the 1970-71 cycle totalled 441,700 hectares and production will reach 1.6 million bales—Mexico, D.F.

Mexican coffee exports set a record

Mexico exported a record 1.6 million 60-kilo sacks of coffee, valued at Cdn.\$104.3 million, during the 1969-70 crop year. This represented a 47.2 per cent increase over the previous year. The Mexican Coffee Institute forecasts coffee production for the 1970-71 crop year at 3.4 million sacks compared with 3.05 million in the 1969-70 cycle—Mexico, D.F.

Trinidad and Tobago extends communications system

The Trinidad and Tobago Telephone Company Limited, in its current (1971-75) Five-Year Plan, will invest the equivalent of almost Cdn.\$50 million in equipment to meet the current demand for communications and in building the basic system to meet demands anticipated beyond the term of the plan. The first step in the implementation of the plan is an estimated Cdn.\$16 million construction program in 1971. The company, which is owned jointly by the Trinidad and Tobago Government and Continental Telephone of the United States, commissioned its first crossbar exchange in October 1970 from a Canadian company, at a cost of more than Cdn.\$2 million. At the end of 1970, the company had 36,000 telephone lines in service—Port-of-Spain

Jumbo jet service for Jamaica

Facilities at Jamaica's Sangster International Airport, Montego Bay, have been expanded to accommodate the increase in air and passenger traffic resulting from the recently inaugurated jumbo jet service of Pan American Airways. The airline has installed more than \$360,000 worth of added aviation equipment for handling jumbo jets—Kingston

Vacation chalets with folding roofs

Two-storey A-frame prefabricated vacation chalets with a patented folding roof, which permits highway trucking to home sites, have been developed by a Michigan firm. They are built in 12' x 32', 12' x 36', and 22' x 38' units, the latter being a three-bedroom unit. Exteriors are finished in cedar shakes and fir plywood siding stained in a choice of three colors. The units are

available with or without furniture and appliances, with prices ranging between \$6,000 and \$17,000 for a de luxe-equipped double unit. Regular foundations of cinder block or poured concrete are suitable, but the units cannot be set directly on a slab, and require piers—Detroit

Cape Town awaits decision on drydock

The decision to build a drydock in Cape Town, South Africa, hangs on the outcome of a feasibility study. Approved in principle by the Industrial Development Corporation (IDC) and South African Railways and Harbours, the venture will be underwritten by IDC, which will then invite financial institutions and others to take part in the project. The intention is to ask ship repairers in Cape Town to take part as a consortium—Cape Town

Direct dialing to Athens

The latest advance in Greece's rapidly expanding telecommunications system is a direct-dialing link with Canada and the United States. Greece is now the second country—Britain was the first—with direct-dialing facilities to North America. The initial charge for a direct call between Ottawa and Athens is \$2.50. The Athens area code is 0030-21—Athens

South American telecommunications link

A telecommunications link between Netherlands Antilles and Venezuela is being studied. Plans include the installation of a 72-channel microwave system to handle radio, telegraph and telephone communications. Canadian manufacturers in the telecommunications field who are interested in this project should get in touch with their representatives in South America or with the Latin America Division, Office of Area Relations, Department of Industry, Trade and Commerce, Ottawa—Caracas

Pineapple exports from Malaysia

Production of pineapple, Malaysia's sixth largest export in terms of value, increased substantially in 1969. Output of fresh pineapple was 301,000 tons (up 8 per cent over 1968); canned production, 66,700 tons (up 8 per cent); canned juice, 1,300 tons (up 33 per cent). Other crops which had an increase over the previous year's production were: tea, 3,433 tons; coffee, 79,107 tons; pepper, 34,384 tons. Maize production of 184,884 tons was up only slightly over the 182,152 tons produced in 1968—Kuala Lumpur

Brazil produces more aluminum

Aluminum production in Brazil will reach approximately 85 per cent of consumption by the end of this year. The newest plant of Alcominas, officially opened in October 1970, has an initial capacity of 25,000 metric tons a year. This will probably result in a continuing

decrease in Canadian shipments to Brazil which, for the first 10 months of 1970, amounted to approximately 6,282 metric tons, worth over Cdn.\$3.6 million. In 1969 Brazilian imports of aluminum ingots from Canada amounted to 16,460 metric tons for a value of Cdn.\$9.4 million—Rio de Janeiro

Brazil boosts cement production

Cement production in Brazil will increase to 20 million metric tons a year by 1975, and investments of over \$500 million will be required to attain this production level. Current annual production is approximately nine million metric tons. The newest plant, which has an annual capacity of 200,000 metric tons, is in the State of Goias—Rio de Janeiro

Jamaica has welding company

A new Jamaican company, Tank Weld Limited, has started to manufacture stainless steel tanks, mild steel tanks, aluminum tanks, steel buildings and trailers. The company will also undertake general steel fabricating—Kingston

Netherlands house-building slows down

According to preliminary figures of the Central Bureau of Statistics, the number of new houses completed in the Netherlands in 1970 totalled 117,125, compared with 123,117 units in 1969. The Minister of Housing and Physical Planning had set a target of 125,000 a year—The Hague

Nigeria's foreign trade increases

Nigeria's foreign trade in 1970 showed a substantial increase over 1969. Imports increased 55 per cent to Cdn.\$1.18 billion, and exports rose 39 per cent to Cdn.\$1.24 billion. Crude oil exports, 28 per cent of the total in 1970, were double the 1969 total. Increases in imports were spread through all commodity sectors—Lagos

Malaysian copra program

The program to revitalize the copra industry in West Malaysia is expected to continue under the Second Malaysia Plan (1971-75). Of the target of 54,200 acres, 39,788 acres had been rejuvenated by the end of 1969, and 9,500 acres were scheduled in 1970. Production of copra has been declining, and the program is aimed at improving the yields per acre, especially on small-holdings where yields range from 600 to 1,000 pounds, compared with an average of 2,000 pounds per acre on the large plantations—Kuala Lumpur

Malaysian oil palm production

Malaysia's oil palm industry produced 77,000 tons of palm kernel and 346,000 tons of palm oil in 1969, increases of 26 and 24 per cent respectively over 1968. The increasing value of oil palm in the economy is reflected in the recent opening of a Cdn.\$3 million

palm oil mill, said to be the world's largest. A French company, Speichim Malaysia, is building a Cdn.\$2.3 million three-phase mill in Sabah and two mills in Johore—Kuala Lumpur

Canadian group buys Dutch tent company

The Canadian Hunter Douglas group has purchased the shares of the Dutch tent manufacturing enterprise, Walker Industrie—en Handelmaatschappij N.V. of Deurne. The takeover fits into the framework of a carefully planned expansion program of Hunter Douglas to develop into an important manufacturer of vacation and leisure-time products.

Hunter Douglas, with headquarters in Rotterdam, manufactures and markets products for the building industry and architects via a network of more than 300 franchise holders in over 75 countries—The Hague

Trinidad firm wins contract

Trintoplan Consultants Ltd. of Trinidad, has been selected as the consulting engineering company to prepare the final designs and contract specification documents for the Cdn.\$1.5 million Navet Dam pump storage project. This project, the first in a series of works to be undertaken by the Water and Sewerage Authority to increase the water supply, is expected to be financed from an anticipated \$48 million loan from the Inter-American Development Bank—Port of Spain

Puerto Rican housing

The Danish firm of Larsen and Nielsen Consultor A/S has entered into an agreement with an American company, International Basic Economy Corporation, and the Puerto Rican company, Rexach Construction Company, to build houses and apartments in Puerto Rico. A factory to produce concrete units for apartment buildings and row houses in Puerto Rico is under construction at an estimated cost of \$7.5 million, and is expected to start operation this summer—Copenhagen

U.S.S.R. buys Dutch poultry

Four Dutch poultry slaughterhouses recently concluded an agreement with the Soviet Union for delivery of 17 million deep-freeze broiler chickens. The order, to be completed by mid-1971, is worth Cdn.\$11.2 million. The purchases amount to 20 per cent of the production of the four poultry firms over a five-month period—The Hague

Boeing gets SRAM contract

The Boeing Company has won a \$148-million contract for production of the short-range attack missile (SRAM) for the United States Air Force. This brings development and production contract costs to some \$600 million on this program. The work force will increase by 500 to 3,600—Seattle

International Loans

El Salvador builds essential power services

Expansion of electric generating and transmission works in San Salvador, the capital and dominant industrial, commercial and financial center of El Salvador, will be assisted by an International Development Association (IDA) \$5.6 million credit. The 33 Mw. plant and 71-mile transmission line, to be built with the help of the credit, are an essential part of a wider development program now being prepared by the Comision Ejecutive Hidroelectrica del Rio Lempa (CEL), the electric-power development agency in El Salvador. CEL, which earlier received four World Bank loans totalling \$25.4 million, now provides through its interconnected transmission system about 86 per cent of the electric power generated in the country. Power consumption is increasing at an annual average rate of more than 11 per cent, because of greater industrialization and rising domestic demand.

IDA credit for farm improvement in India

India will use a \$24.4 million International Development Association (IDA) credit for irrigation works, land levelling and farm mechanization in the State of Andhra Pradesh. It will finance medium and long-term institutional loans to farmers for installing more than 1,300 tubewells, the digging of 14,000 wells, and the improving of 5,000 existing wells. It will also provide for the purchase of close to 20,000 electric motors and oil engines for pumping water and some 1,500 tractors, tractor implements and trailers. Land levelling will be chiefly on small farms within two large irrigation systems.

Major benefits resulting from the project will be an increase in foodgrains production by some 160,000 tons a year and expansion of the area planted to crops by 123,500 acres. This current IDA credit is part of a \$45 million agricultural development program.

Technical Education in Greece

Greece will use a World Bank loan of \$13.8 million to construct and equip five higher technical education centers in Athens, Patras, Thessaloniki, Larissa and Iraklion. This is the first phase of a long-term program which will make the education system a more effective instrument for economic development. The centers, located in major cities, will graduate 2,350 technicians annually, who will be trained for a wide variety of occupations in agriculture, business, engineering, food processing and

health. The combined enrollment of the centers will be 6,660 students.

The project is scheduled for completion in four years at a total estimated cost of \$24 million, of which the \$13.8 million loan will cover the foreign exchange requirements and the balance will be met by the Greek Government

Malaysia expands port facilities at Sibul

The foreign exchange cost of the Sibul port expansion in Sarawak, Malaysia, will be met by an Asian Development Bank loan of U.S.\$3.5 million and the balance of the \$5.3 million needed will come from government sources. Sibul, 55 miles upstream on the Rajang River, is the second largest city and port in Sarawak. Congestion there has resulted from increased cargo traffic because of regional expansion in the last ten years. Sibul handles about 35 per cent of Sarawak's imports and 28 per cent of its exports.

The 486-foot-long wharf will be extended by 1,000 feet and supporting facilities will include two transit sheds and mechanical cargo-handling equipment. Scheduled for completion by the end of 1974, the project will play a significant role in the implementation of Sarawak's Second Five Year Plan.

Vietnam modernizes its fishing fleet

An Asian Development Bank concessional loan of U.S.\$2.5 million and a technical assistance loan of U.S.\$68,000 to the Republic of Vietnam will help finance the mechanization of 394 fishing boats and the updating of fishing methods. The project is the initial phase of an integrated fisheries development program which will supply engines, machinery and equipment to 200 gillnetters, 184 coastal trawlers and 10 trawlers for an offshore pilot scheme. The loan will also finance construction of two cold storage plants. Total cost of the project is estimated at U.S.\$2.5 million in foreign exchange and VN\$1,034 million in local currency, which will be provided by the Agricultural Development Bank of Vietnam (ADBV) and the private sector. The ADBV will handle procurement and distribution for the project.

The fishing industry employs close to 277,000 fishermen and provides 30,000 jobs in related marketing and processing industries. Fish and fish products are a major source of protein in Vietnam. To ensure the successful implementation of the project, a team of one master fisherman and one specialist will train fishermen

in the use of the new equipment, introduce new fishing techniques, improve government training facilities for master fishermen, help in development planning for the fisheries sector, and guide the operations of the pilot offshore scheme.

Modernize Tea Factories in Ceylon

Ceylon will continue its program of modernizing its tea factories with a U.S.\$3.5-million loan from the Asian Development Bank. It is complementary to the first loan of \$2 million which was made available to the Central Bank of Ceylon in 1968 and which helped modernize 126 of the 870 Ceylonese tea factories. The current loan is expected to benefit about 175 factories. It will be used to finance the foreign exchange costs of tea-factory machinery, improvement to and/or extension of factories, electrification of factories, and the purchase of vehicles for transporting green leaf.

Modernization of the tea factories is expected to reduce the unit cost of production and lead to an improvement in tea quality, thus enabling the industry to earn more foreign exchange. Tea accounts for between 55 and 60 per cent of total Ceylonese exports.

Nepal revamps jute industry

A jute development project in Nepal will be assisted by two Asian Development Bank concessional loans of \$2 million each. They will be used to improve the quality of raw jute and manufactured jute products, to modernize two jute mills, and to upgrade marketing and trading facilities.

The raw jute program is designed to increase production through improved seed and more efficient agricultural and processing practices, achieved by strengthening the jute experimental station and expanding demonstration farms. The modernization program will replace worn-out and obsolete machinery and equipment of two mills owned jointly by private interests and the Government. The entire manufacturing process, from raw jute to finished hessian and sacking cloth, is carried out at the two mills.

Of the total \$4 million loaned, \$3.7 million will be used to modernize the jute mills and the remaining \$300,000 will go to the raw jute program.

Jute commands a high priority in Nepal's Fourth Five-Year Development Plan and amounts to 80 per cent of exports to countries other than India.

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 .99.

To convert column two, *divide* by .99.

Country and Currency	Value of		Country and Currency	Value of	
	foreign currency unit in Canadian dollars at February 24	Canadian dollar in foreign currency units		foreign currency unit in Canadian dollars at February 24	Canadian dollar in foreign currency units
Algeria Dinar	.2053	4.87	Dominican Republic Peso	1.0075	.99
Argentina Peso (free)	.2519	3.96	Ecuador Sucre (official)	.0403	24.81
Australia Dollar	1.1375	.87	El Salvador Colon	.4030	2.48
Austria Schilling	.0389	25.68	Fiji Dollar	1.1631	.85
Bahamas Dollar	1.0075	.99	Finland Markka	.2399	4.16
Belgium and Luxembourg Franc	.0203	49.26	France, Monaco, etc. ² Franc	.1827	5.47
Bermuda Dollar	1.0075	.99	Franco-African Republics ³ Franc	.0037	273.67
Bolivia Peso	.0846	11.81	French Pacific ⁴ Franc	.0101	99.50
Brazil Cruzeiro (official free)	.2009	4.72	Germany D Mark	.2775	3.60
Britain Pound	2.4376	.41	Ghana New Cedi	.9874	1.01
British Honduras Dollar	.6078	1.64	Greece Drachma	.0336	29.77
Burma Kyat	.2116	4.72	Guatemala Quetzal	1.0075	.99
Ceylon Rupee	.1693	5.90	Guyana Dollar	.5884	1.69
Chile Escudo (bank rate) (free)	.0852 .0705	11.73 14.23	Haiti Gourde	.2015	4.96
China, People's Republic of Renminbi	.4125	2.42	Honduras Lempira	.5038	1.98
Colombia Peso (fixed)	.0521	19.20	Hong Kong Dollar	.1662	6.01
Congo (Kinshasa) Zaire	2.144	.46	Hungary Forint (official)	.0921	10.85
Costa Rica Colon	.1521	6.57	Iceland Krona (official)	.0115	87.33
Cuba ¹ Peso	India Rupee	.1337	7.47
Czechoslovakia Koruna	.1399	7.14	Indonesia ⁵ Rupiah	.0027	374.22
Denmark Krone	.1347	7.42	Iran Rial	.0131	76.41

Country and Currency	Value of		Country and Currency	Value of	
	foreign currency unit in Canadian dollars at February 24	Canadian dollar in foreign currency units		foreign currency unit in Canadian dollars at February 24	Canadian dollar in foreign currency units
Iraq Dinar	2.8210	.35	Peru Sol (free)	.0232	43.08
Ireland Pound	2.4376	.41	Philippines⁶ Peso (free)	.1569	6.37
Israel Pound	.2879	3.47	Poland Zloty (fixed basic rate)	.2537	4.01
Italy Lira	.0016	617.66	Portugal & Colonies⁷ Escudo	.0350	28.53
Jamaica Dollar	1.2188	.82	Saudi Arabia Riyal	.2062	4.84
Japan Yen	.0028	354.73	Sierra Leone Leone	1.508	.66
Kenya Shilling	.1412	7.08	Singapore Dollar	.3273	3.05
Korea, Republic of Won	.0032	312.72	South Africa Rand	1.4238	.70
Lebanon Pound (free)	.3123	3.20	Spain & Dependencies Peseta	.0145	69.06
Malaysia Dollar	.3291	3.03	Sweden Krona	.1952	5.12
Mexico Peso	.0806	12.40	Switzerland Franc	.2345	4.26
Morocco Dirham	.2024	4.94	Syria Pound (free)	.2819	3.55
Netherlands Florin	.2803	3.56	Thailand Baht (free)	.0489	20.46
Netherlands Antilles Florin	.5342	1.87	Trinidad & Tobago⁸ Dollar	.5038	1.98
New Zealand Dollar	1.1408	.87	Tunisia Dinar	1.9191	.52
Nicaragua Cordoba	.1439	6.94	Turkey Lira	.0672	14.88
Nigeria Pound	2.8376	.35	United Arab Republic Pound (official)	2.3173	.43
Norway Krone	.1411	7.08	United States Dollar	1.0075	.99
Pakistan Rupee	.2116	4.72	Uruguay Peso (free)	.0040	248.13
Panama Balboa	1.0075	.99	Venezuela Bolivar (official free)	.2242	4.46
Paraguay Guarani (free)	.0081	124.06	Yugoslavia Dinar (official)	.0672	14.88

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, Cameroon, Togoland, and Malagasy. Also Reunion, Comoro Islands, St. Pierre and Miquelon.

4. New Caledonia, New Hebrides, French Polynesia.

5. Exchange rate at December 9, 1970.

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

INDONESIA

Area: 735,340 square miles.

Population: 122 million (estimated 1969).

Climate: tropical. Average temperature 80 to 90 degrees F. Average humidity 80 per cent throughout year. Wet season November-March and dry season June-October.

Language: Indonesian; business correspondence in English.

Currency: rupiah. Devisa Credit—326 Rp = U.S.\$ 1.00 (imports through aid credits). Devisa Umum—free exchange supported at 376 Rp to U.S.\$ 1.00 (all other imports and exchange transactions). Petroleum rate: Adjusted monthly. Exchange rate stable since October 1968.

Weights and measures: metric system.

Electric supply: 50 cycles; single and three phase 127/220 volts; frequency stable, voltage fluctuating.

Capital: Djakarta.

Chief ports: Djakarta, Semarang and Surabaya on Java, Medan on Sumatra, Makasar on Celebes (Sulawesi).

Marketing centers: Djakarta (population) 1968: 4,774,000; Surabaya 1,195,000; Semarang 679,000; Bandung 1,085,000; Jogjakarta 371,000; Medan 568,000; Makasar 455,000.

Economy: based primarily on rice and estate agriculture, rubber and oil production, and mining.

Total Indonesian imports: (note: trade figures subject to wide margin of error). 1968—U.S.\$872 million; 1969—U.S.\$1,107 million.

Imports by category: (1969, c.i.f. U.S.\$million). By source of financing: export earnings 551; supplier credits 52; free foreign exchange 137; aid-financed 364; private capital imports 3. By commodity: consumer goods 301 (rice 108, wheat flour 22); basic materials 391 (textiles 86, oil 82, fertilizer 33, iron bars and sheets 36); capital goods 221 (trucks and buses 21, aircraft engines 14.6); gift parcels .96.

Value of imports from Canada: 1968—Cdn.\$2.4 million; 1969—Cdn.\$2.9 million.

Chief imports from Canada: (Cdn.\$'000) 1969—wheat flour 1,239, newsprint 426, transformers and parts 260, milk powder 218.

Total Indonesian exports: 1969—U.S.\$1,015 million.

Chief exports: (U.S.\$million, f.o.b.) 1969—natural oil 384, rubber 197, tin 64, coffee 45.

Value of Canadian purchases: 1968—Cdn.\$445,388; 1969—Cdn.\$284,183.

Chief Canadian purchases: (Cdn.\$'000) 1969—pepper 95, tea 45, crude natural rubber 36, sisal fibers 28.

Dollar exchange: no formal import licensing but indirect import controls by means of restriction of bank credit to importers, restriction of certain classes of imports to aid funds, high tariffs and surcharges on non-essential commodities, advance collection of income tax on imports, etc.

Prices: quote U.S. dollars c. & f., Indonesian port. Insurance must be placed in Indonesia.

Samples: duty payable on all commercial samples and publicity material valued in excess of U.S.\$10 if dispatched direct to commercial firms in Indonesia.

Usual terms of payment: draft letter of credit allowing sight drawings, irrevocable but unconfirmed. Financial regulations require full amount of foreign exchange to be held by Indonesian foreign exchange bank before letter of credit can be opened.

Trade agreements: exchange of most-favoured-nation agreement with Canada under GATT; in practice, equal tariff treatment of imports from all countries.

Correspondence: airmail only: letters 25 cents each half ounce.

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

For detailed information on this market write to: Asia Division, Office of Area Relations, Department of Industry, Trade and Commerce, Ottawa, or Commercial Secretary, Canadian Embassy, Djalan Budi Kemuliaan 6, Djakarta, Indonesia.

They're Building Their Own



Peter Hull, sales manager for a British engineering company, was the moving spirit in the organization of the Bedworth Self Build Housing Association. Today he is both its secretary and site foreman. Here he inspects the framing for one of the houses going up on the site. Peter was largely responsible for the use of Canadian timber frame methods by the Association.



Each member of the Association has to put in at least 24 hours working on the site per week. This means three or more evenings and most of the weekend; the average is 28 hours per week. Each dwelling is costed by a system that takes note of the number of hours' work put in on the site by the member whose home it is to be, and whether his record is above or below the average.



This is one of the first homes completed at Bedworth. Framing for each is of CLS Pacific coast hemlock, with the sheathing and flooring of Canadian fir plywood. The cladding on the upper storey is saw-textured western red cedar and the same wood is used for the window frames. The houses range from four-bedroom two-storey types to two-bedroom bungalows of 900 square feet.

Four years ago, a group of 33 persons at Bedworth in the English Midlands decided to beat the high cost of housing by putting up their own homes. The idea took root in the mind of Peter Hull when he visited the Building Exhibition in London and watched a demonstration of Canadian timber frame housing methods. He formed the 33-member Association which

began investigating possible sites, financing methods, and technical problems. Eventually the Association won the backing of the local authority, which helped it to obtain land at good prices and government-backed loans. Technical advice came from the London staff of the Council of the Forest Industries of B.C. The development has been named, appropriately, Columbia Gardens.

If undelivered return to:
Information Canada, Ottawa, Canada

CANADA
POSTAGE PAID
PORT PAYÉ

Here's one way to get your kids to take their lunches to school. Even if the corner grocery store in France is giving way to the supermarket (see article on page 9), it is doubtful if the French loaf will ever be a thing of the past.

