foreign trade

VOL. 14 OTTAWA, JULY 4, 1953 NO. 340

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COVER . . . These two-story doors of the new addition to the Federal Reserve Bank Building in Boston bear the shields of the six New England States, executed in bronze. The picture serves as a fitting introduction to a comprehensive report on New England business and industry. (See page two.)

Published weekly by the Department of Trade and Commerce under the authority of the Right Hon. C. D. Howe, Minister, and WM. FREDERICK BULL, Deputy Minister.

Please forward all subscriptions and orders to: The Queen's Printer, Government Printing Bureau, Ottawa.
Price: $2.00 a year in Canada; $3.50 abroad. Single copies: 10 cents each.

New England's Share in U.S. Business

Rejuvenating old-established industries and striking out in new directions—this technique is helping New England retain its place as one of the most prosperous U.S. industrial areas.

BOSTON—New England is one of North America's most highly developed industrial areas. Its strength is reared on a base of 24,000 manufacturing plants, their $15 billion production and $5 billion annual payroll. Despite regional problems—primarily the difficulties facing the textile industry—New England's record in 1952 was impressive and came close to an all-time high. Compared with their countrymen in other parts of the U.S., New Englanders had more take-home pay and 50 per cent more cash in their bank accounts. They spent more money in retail stores, carried more life insurance, owned more telephones, radios, and television sets, and had a higher rate of home ownership. On practically all fronts the economy gave evidence of strength and vigour and a wave of determination to rejuvenate old industries and expand new ones gathered momentum throughout the year.

Trouble in Textiles

The textile industry suffered major distress in the midst of one of New England's periods of greatest general prosperity. June 1952 employment in the cotton and rayon mills was a third lower than in January 1951; payrolls were down 39·9 per cent. Much the same situation held good in the woollen and worsted industries. At the same time, management faced demands from labour for increased wages and refusal to accept higher work-loads. The great domestic competitor, the South, continued to exert pressure by building new mills to accommodate northern textile firms.

By June, however, a series of wage arbitrations took place which secured reductions roughly equivalent to increases granted earlier and the mills began a slow recovery. Between July and October some 11,000 persons resumed work, though total employment remained 60,000 below the peak of 1951. At the end of the year, the Governors' Committee on the Textile Industry reported that obsolete mills and methods, work-loads and wage costs out of line with southern competition, state taxes and federal subsidies, and unco-operative local attitudes were responsible for the present dilemma. At the same time it deplored exaggerated public statements which had misrepresented the facts. Although the loss of cotton spindles has been heavy, the position in woollens and worsteds was maintained, the rayon record was satisfactory, and the total production of all textiles has actually increased.

The combined metal-using industries now outrank textiles as the area's largest employer, providing nearly 42 per cent of New England's manufacturing jobs. This group includes primary and prefabricated metals, machinery, electrical machinery, transportation equipment and instruments. During 1952 the industry had a good record despite the problems raised by the steel strike. Employment averaged 636 thousand during the year—a gain of 17,000 over 1951 and an increase of 42,000 in the past five years. Transportation equipment, electronics and electrical equipment are the fastest growing industries in the group. In the past five years employment in transportation equipment manufacture has jumped from 55 thousand to close to 100 thousand.

Production of aircraft and automobile parts is booming, with large defence orders in hand; demand for railroad equipment and ships has been steady. Employment in the electronics and electrical machinery industries has jumped by 18,000 since 1947 and now stands at 126 thousand. Large defence orders have necessitated rapid expansion so that New England now produces 15 per cent of the total U.S. output of these goods. This impressive record has been achieved in spite of the fact that New England is a steel deficit area and manufacturers must bring in their requirements from distant mills at an additional cost of $10 a ton.

On the Record . . .

In 1952, New England:

- *Saw the metal-using industries outrank textiles as the area's largest employer.*
- *Turned out one-third of the United States total output of plastics.*
- *Produced some 170 million pairs of shoes, one-third of U.S. total.*
- *Received $32 million worth of defence orders for chemicals and allied products.*
- *Saw capital projects totalling $52·5 million approved by the pulp and paper industry.*

Remarkable growth in another modern industry, plastics, is helping to broaden the base of New England's economy. During 1952 capital investment was heavy, production increased substantially, and the variety of new products mounted. By the end of the year, one out of every five plastics workers in America was employed in New England and her factories were supplying one-third of the nation's total plastics output. Value of this production last year was a fat $225 million and expansion is continuing.

New England's chemical industry also enjoyed an excellent year. About two-thirds of the chemical output was in products which gained added value by processing. Soap and similar products, industrial organic chemicals, drugs and medicines and miscellaneous chemical products accounted for 78 per cent of the total. The industry also received approximately $32 million worth of defence orders and produced some 20 per cent of the total U.S. output of chemicals basic to the plastics industry.

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The shoe and leather industry made substantial progress last year and, as it has for many years, it again turned out about a third of the nation's total shoe output, or some 170 million pairs. For the first nine months of 1952 production was up 9·2 per cent over the same period of 1951—more than twice the rate of increase for the nation as a whole. Shoe sales were lower, however, with dollar value down about 5 per cent from 1951.

The pulp and paper industry showed real determination and made progress throughout the year. A $30 million hardwood pulp mill was started in Maine by the Great Northern Paper Company and approved capital projects in the industry totalled $52·5 million. Research and forest management received attention.

How Agriculture Fared

Agricultural production recorded only modest gains and income remained at or slightly below the level of 1951. The Maine potato crop was some 10 per cent larger and marketing proceeded at year-end at prices five per cent above those of a year ago. The apple and cranberry crops were poor compared with the previous year and the blueberry pack very small. A serious drought in July and August brought severe losses in truck crops, potatoes, blueberries and forage crops. The poultry industry, now holding first place in New England's farm economy, had a successful year, with income from some products up and others slightly down. Livestock disease in the form of vesicular exanthema in swine constituted a serious menace and has penetrated steadily into the region. Outbreaks in Rhode Island and Massachusetts have caused a great deal of concern.

The Fish Market

New England fishermen were forced to increase their landings substantially in order to earn an income equal to that of previous years. Competition from foreign fish fillets—principally from Canada, Iceland and Norway—and a scarcity of raw fish products for local plants combined to create uncertainty in the industry. However, frozen seafoods continued to grow in popularity. Unusually high fish inventories and competition from lower-priced meat, principally beef, since the beginning of 1953 has been keeping fish prices at levels considerably below those of 1952. Within recent weeks, however, inventories have been substantially reduced and now compare well with those at this time last year. With beef prices expected to rise in coming months, the fish industry feels it will get better prices for its products.

Early in 1953 private fishing interests in Massachusetts moved to implement legislation which would prohibit the import of lobster and crab meat from Canada. Opposition from distributors and consumer groups was so strenuous, however, that the measures were defeated by a substantial majority in the Massachusetts Senate.

Construction activity got off to a slow start in 1952 but by the year-end established an all-time record of $1,016 million in total contracts awarded. The actual gain over 1951 was small, however, and came primarily from price advances. Residential contracts were 14 per cent higher in value and public works and utilities contracts also gained in value. Declines from 1951 levels were confined to plant, hospital, institutional and recreational building.

The Port of Boston registered its third successive increase, with a record high of 19,233,685 tons of cargo handled during the year. The port modernization project continued to progress and a measure to reorganize the port administration is now before the state Legislature.

Toward the close of the year plans were announced for the construction of a $75 million business centre in the Back Bay area of downtown Boston, on the lines of Rockefeller Centre in New York City. A trend toward the establishment of manufacturing industries in planned industrial centres outside urban limits became more pronounced. Accelerated conversion of the region's manufacturing resources to new products such as plastics, electronic and metal products continued.

Development Plans

To keep pace with modern needs, plans were announced to form a State Commerce Department for Massachusetts early in 1953. In conjunction with this, the Governor has launched a drive for the establishment of a privately financed business development corporation to provide a $20 million fund of risk capital for business expansion and attraction of new industries. Incidentally, one of New England's most prominent businessmen and a long-time friend of Canada, Richard L. Bowditch, was installed as President of the United States Chamber of Commerce in May. It is interesting to note that New England business is firmly behind the extension of the Reciprocal Trade Agreements Act. This fact was brought out in a poll of some 1,000 business and industrial leaders early in 1953, conducted by the New England Council and New England Association of Commercial Executives. Surprisingly, this intensely developed manufacturing area also favoured a low tariff policy.

First Quarter of 1953

The New England economy continued to enjoy a high and gradually rising level of activity in the first quarter of 1953. Most industries reported good to excellent conditions and this included shoes and cotton textiles. Retailers and manufacturers in general enjoyed improved business. However, there were a few unfavourable signs. Prices of most farm products declined. Woollens and worsteds remained in an uncertain position and construction of industrial plants slowed down. However, these cloudy spots were offset by gains in most other directions.

Demand for and production of manufactured goods in Massachusetts established comparatively high levels in the first quarter and the trend continued into April. Increased employment in the non-durable goods industries lent balance as the production of durable goods for the defence program levelled off. Prices of manufactured goods have held steady since decontrol. Retail trade is easing off somewhat, after maintaining levels during the first quarter comparable to last year. However, the general business picture continues good and the outlook is bright.

—D. H. Cheney

Vice-Consul of Canada and Assistant Trade Commissioner

Caribbean Markets for Canadian Fish

. . . A review of the demand for Canadian fish in four Caribbean countries, with advice on what consumers prefer, methods of shipping, and the sales outlook for the next few months.

KINGSTON—In the first three months of 1953, business conditions in Jamaica were generally prosperous. The sugar contract with the United Kingdom has provided a sure market and a profitable return; the banana, coffee, cocoa and pimento crops flourished and are expected to fetch good prices. The tourist trade has become the island's number two industry and its biggest dollar earner. In addition, three large bauxite companies will soon be operating at full capacity.

Demand for Cured Fish

Naturally, this prosperity has been reflected in the figures on imports of fish. For the first quarter of 1953, imports of Canadian cured fish increased considerably compared with the first three months of 1952. For the 12 months of 1952, salted codfish imports fell off by 1·7 million pounds, though the value rose from £611,318 c.i.f. in 1951 to £618,134 c.i.f. in 1952. This drop was caused largely by the rise in prices, which temporarily dislocated orderly marketing. For both years, imports from other sources totalled less than one million pounds.

Under government control the maximum c.i.f. price is £30 7s. 6d. per cask of 448 lb. net. Recent Canadian quotations have been somewhat lower. Fixed retail cost to the consumer is 1s. 7½d. a pound. Lately the Halifax-Kingston freight rate was reduced from $6.85 to $6.50 per cask of 448 lb. net. Insurance is 91 cents a cask.

Pickled and Canned Fish

Average yearly imports of pickled fish vary between seven and ten million pounds. Consumer demand is for 70 per cent mackerel, 20 per cent herring and 10 per cent alewives. Canada is the only important source of supply, and shipments come forward in water-tight barrels each containing 200 lb. net.

Consumers look only for large fish and exporters would be wise not to vary the traditional methods of curing pickled fish for this market because the Jamaicans strongly object to any change.

Jamaica was once a very important outlet for Canadian canned fish but imports are now restricted to allocations granted under the BWI Trade Liberalization Plan. At the moment, local government authorities do not seem inclined to permit additional imports under the general dollar program.

All dried, salted and pickled fish (with the exception of salted codfish) are on Open General Licence. This means that Canada is free to exploit this market if prices are competitive.

Imports of salted codfish are on a free licence but the allocation granted Canada is sufficiently high to warrant maximum annual sales at the present prices. Imports from sterling area or from non-dollar, non-sterling countries are not restricted.

Haiti

A reduction in the coffee crop and the fall in sisal prices have affected the whole Haitian economy. Sales of processed fish have, as a result, dropped sharply and will probably continue lower than in 1953 unless conditions improve.

Haiti imported 18·25 million lb. of processed fish valued at $1·73 million during the fiscal year ended September 30, 1952. Canada supplied over 88 per cent of the volume and more than 90 per cent of the total value.

The great demand is for dry salted alewives and imports from Canada reached 7·2 million lb. in 1952. Purchases of Canadian bloaters for the same year were 5·5 million lb.; of heavy salted codfish, 1·3 million lb.

Prices for pickled or dry salted alewives (f.o.b.) have fluctuated considerably in recent months. Quotations for old catch vary from $11 to $13.50, according to quality and size.

At present Canadian c.i.f. rates for bloaters are competitive with European imports, but sales are slow because the market is overstocked. Salted fish (pollock and codfish) fetch good prices but sales are small compared with alewives and bloaters.

In this Canadian plant on the East Coast, dried salt cod is being processed in a mechanical salt fish dryer, for shipment to Caribbean customers.

Haitians prefer large-size alewives, dry salted, and with a large percentage of fish containing roe.

Bloaters should be bright yellow, dry and firm, but have a low fatty content. Haitian buyers prefer large choice standard grades, packed in boxes of 80 to 120 and weighing 18 lb. net.

In salted fish, the consumers like large and heavy fish, very white. Maximum moisture content should not exceed 38 per cent. Inferior grades will sell, but only if prices are very low by comparison.

Bloaters in bundles of two cases are charged a freight rate of 41 cents. Freight on alewives is $2.24 per barrel of 200 lb. net.

Dominican Republic

Compared with other Caribbean countries, the Dominican Republic is enjoying a large measure of prosperity, though Canadian exporters of saltfish to this market saw their sales drop off by about 183,260 pounds in 1952 as compared with 1951. In 1950, total saltfish imports were 4,741,921 lb., valued at D.R.$602,140. The following year, 1951, imports rose to 7,354,089 lb., valued at D.R.$1,000,381. Canada's share in this trade amounted to over 95 per cent of the total quantities and values for each year. Despite the drop in imports from Canada in '52, she maintained her position of being the only important source of supply with a total of 7·3 million pounds.

Preferred Types

Prewar, imports for the most part consisted of hard and semi-dried heavy salted codfish. Today the buyers look for heavy salted scale fish with a maximum moisture content of 38 per cent. Pollock is most popular in the southern areas; the northern areas prefer hake and cusk. Duty on salted fish is 26 per cent of the f.o.b. value, plus two cents per kilo of the net weight. As in all Caribbean markets, consumption is governed more by price than by any other factor. Labourers, who are always striving to obtain a cheap preserved protein food, are the principal buyers of saltfish.

Bloaters

Imports of bloaters for 1951 totalled 3,546,998 lb. as against 3,360,489 lb. in 1950, valued at D.R.$360,534 and D.R.$311,584 respectively. Consumers like No. 1 or "choice" grade but "standard" or No. 2 will sell if prices are very much lower. Fish should be bright yellow, firm, dry and with a low fatty content.

Wooden boxes containing 18 lb. net are standard packages and the number of fish per box should be from 80 to 120. This is *most important* because they are sold individually and not by the pound. During the first quarter of 1953, imports from Europe undersold Canadian bloaters, with the result that considerable sales were lost.

A recent government order designed to conserve beef herds by reducing local beef supplies may mean a greater demand for imported fish. Sales should thus equal or exceed those in previous years.

Puerto Rico

Puerto Rico offers the largest Caribbean market for salted fish. Imports (composed almost entirely of cod) for the year ended June 30, 1952, totalled 37,311,792 lb. Canada supplied 96·58 per cent of this, most of it from the province of Newfoundland. Comparatively small quantities of other types of processed fish also come in.

Puerto Ricans prefer small, hard-dried, light salted codfish with a maximum moisture content of 38 per cent. Prewar, the great bulk consisted of small, semi-dried, heavy salted cure containing between 42 and 44 per cent moisture. At the moment, the price differential between the two cures is not sufficient to encourage sales of semi-dried.

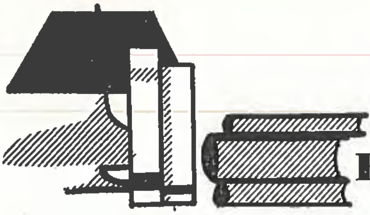
Recently the c.i.f. prices have fluctuated considerably, but Canadian exporters can usually compete successfully with imports from Europe and St. Pierre. Rates of duty are 50 cents per 100 lb. for salted fish with maximum moisture content of 41 per cent, and 25 cents when the moisture content is above 41 per cent but does not exceed 44 per cent.

Since the OPS was abolished in the United States (including Puerto Rico), retail prices of salted codfish have fallen below the former OPS maximum. If prices go above the former maximum allowed, the general opinion is that restrictions may be re-imposed by local government authority.

Present indications are that imports of salted fish during 1953 will equal those of previous years. Prices are tending to drop and consumption may therefore even exceed that of 1952.

—E. M. Gosse
Canadian Government Trade Commissioner (Fisheries)

Here is a part of the footwear display featured in the Canadian Showroom, Rockefeller Center, New York, throughout May and June. Thirteen Canadian shoe manufacturers teamed up to display their fall and winter lines.



Businessman's Bookshelf

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Canada: Nation on the March

A symposium. 212 pages. Cloth $3.50.

EARLIER THIS YEAR, through the joint efforts of a Canadian and an American committee, a series of six evening programs was held at Town Hall in New York. The addresses made on those occasions by prominent Canadians have now been edited and published. The subjects range from the people and their history through financial, labour and social legislation on to resources development, political philosophy and the culture of Canada. The authors include cabinet ministers and businessmen, university presidents and journalists. There are parts of fustian and much indeed of fine weave. Dry humour and oratory are intermingled with sound descriptive material. The score of brief chapters gives much to stimulate thought and pride of country.

Order from: Clarke Irwin and Company Limited, 103 St. Clair W., Toronto.

Second World Food Survey

Food and Agriculture Organization. 59 pages. 50 cents.

WHAT HAS HAPPENED to the world food supply since 1946? What is the outlook today? This second report—the first was published in 1946—sets out to answer these questions. It emphasizes that the low point was reached in 1946-47; since then, recovery has continued, though unevenly. The actual situation is reviewed in the light of nutritional targets to be achieved by 1960 and progress is thus measured. The survey does more than set out the facts; it also suggests how the desired objectives may be achieved.

Order from: Ryerson Press, 299 Queen Street W., Toronto. Ont.

Whither Bound Japan?

Foreign Commerce Department, Chamber of Commerce of the United States. 18 pages. Free.

THIS BRIEF DISCUSSION of Japan's economic future does not pretend to offer solutions to a thorny problem. It does, however, analyze that problem. U.S. aid to Japan since the war (about $2,276 billion), Japan's foreign trade position, her great need to import raw materials, her loss of markets in the Communist countries—all these are taken up in turn. The only conclusion reached is that Japan faces an uphill climb to economic health and that "she can only make this climb if she is assisted by the other trading nations of the free world in letting her earn her keep".

Order from: Chamber of Commerce of the United States, Washington, 6, D.C.

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The Canadian Balance of International Payments, 1952

Prepared by International Trade Division, Dominion Bureau of Statistics. 32 pages. 25 cents.

LAST YEAR, Canada had a current account surplus of $151 million in transactions with all countries, in contrast to deficits in 1950 and 1951. At the same time, the Canadian dollar rose in value. These two developments are analyzed at some length in this pamphlet. Statistics on and explanation of the changes in the commodity balance are followed by a study of international travel expenditures, receipts and payments of interest and dividends, freight and shipping transactions, and capital movements between Canada and all other countries. The closing section deals with Canada's international investment position.

Order from: Dominion Bureau of Statistics, Ottawa, Ontario.

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International Trade News Bulletin

By Secretariat of the General Agreement on Tariffs and Trade. About 31 pages (mimeographed). $3 U.S. a year (12 issues).

THIS BULLETIN, prepared by the GATT staff in Geneva, gathers together news reports on the operation of the General Agreement and provides information on developments in commercial policy which have world-wide significance. It also lists new trade agreements and other inter-governmental trade arrangements. An index, issued once a year, enhances the value of the Bulletin and makes reference easier.

Order from: GATT Secretariat, Villa le Chene, Palais des Nations, Geneva, Switzerland.

Economic and Commercial Conditions in Mexico, 1952

By R. G. Stone. 94 pages. 90 cents.

MOST EXPORTERS are familiar with the Overseas Economic Surveys sponsored by the U.K. Board of Trade. The latest addition to this useful series was prepared by the United Kingdom Commercial Counsellor at the Embassy in Mexico City last September. It follows the usual pattern, classifying the information under seven main headings: finance, trade, agriculture, mining and petroleum, industry, labour relations and social questions, and communications.

Order from: United Kingdom Information Office, 275 Albert Street, Ottawa.

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Hong Kong's Enamelware Industry

Since the war this industry has grown rapidly from two to fifteen factories; last year its export earnings were second highest in the Colony.

HONG KONG—The enamelware industry in Hong Kong has grown from only two factories before the war to 15 today. This marked expansion has been brought about largely by Shanghai businessmen who have moved to the Colony from the China mainland since 1948, bringing with them capital and skilled workers. The industry employs about 3,500 workers and has 64 muffle furnaces. Although virtually all of the raw materials have to be imported, the abundant labour supply in the Colony, coupled with a strong demand for low-cost enamelware in Southeast Asia and Africa, have favoured the industry's development. Chief items produced are mugs, trays, bowls, basins and spittoons, usually stencilled in garish colours to suit consumer tastes in the main markets. The value of enamelware exports in 1952 was HK$44,239,244* second only to textile industry exports.

Blackplate Is Major Material

Tin mill blackplate is the major raw material used by the industry and the Hong Kong Government estimates monthly needs at 1,780 long tons. The United States is the chief supplier, followed by Japan, Canada, and the United Kingdom. Before December 1950, when the United States imposed controls on exports to Hong Kong, very little blackplate was purchased from Canada. After the embargo came into effect new sources had to be found and it was then that the Canadian product gained a foothold in the Hong Kong market. Although supplies from the United States are again adequate, the industry still imports from Canada because it has found Canadian blackplate of good quality and competitive with the American product. The table below summarizes the imports of blackplate during 1952. The bulk, although not all, of this blackplate is used in the enamelware industry.

Imports of Blackplate, 1952

Country	Quantity Cwt.	Value HK$
United States	235,720	8,334,907
Japan	81,896	4,657,184
Canada	23,480	1,060,440
United Kingdom	16,581	883,706
Belgium	2,127	162,083
Total	359,804	15,098,320

Source: Hong Kong Department of Commerce and Industry.

* HK$1.00 equals approximately Can.$0.17.

Blackplate sheets with a gauge of 26-33 U.S.G. are considered most suitable for enamelling because they have the right degree of flexibility. Three types of sheets are used—rejects, waste and waste wasters. Preferred sizes for sheets are 18 by 24 inches and larger, otherwise there is too much loss after punching out the primary circles. There is little market for the considerable by-product of scrap cuttings and these are virtually given away to Japanese buyers.

Raw Material Imports

Raw Material	Country of origin	Estimated monthly requirements for 64 furnaces
Tin mill blackplate	United States Japan Canada United Kingdom Belgium	1,780 tons
Borax	United States	320 "
Antimony metal	China	51 "
Antimony oxide	China United Kingdom Belgium	64 "
Tin oxide	United Kingdom	45 "
Titanium dioxide	United States France	64 "
Soda ash and potassium carbonate	United Kingdom Europe	160 "
Cryolite and sodium silico-fluoride	Greenland United States Europe	64 "
Sodium nitrate and potassium nitrate	United States Europe	45 "
Clay	United Kingdom Hong Kong China	51 "
Quartz, flint and glass sand	Hong Kong	288 "
Feldspar, orthoclase	Hong Kong	288 "
Fluorspar	China Europe	64 "
Cobalt oxide	Canada Europe	3,840 lb.
Nickel oxide	Canada Europe	3,200 to 5,100 lb.
Manganese dioxide	China	64 tons
Cadmium sulphide, orange or lemon; cadmium red, blue, green oxide, pink oxide, brown oxide, Naple's yellow; chromium oxide; ferric oxide; black oxide, etc.	United Kingdom Europe	19,200 lb.

Source: Hong Kong Enamelware Manufacturers Association.

The machinery used to convert the blackplate sheets into the different shaped utensils has either been manufactured locally or brought from China. The sheets are fed by hand into stamping machines which punch out discs of various sizes; heavy drawing presses then cast them into shape. Next the surfaces are smoothed by spinning each utensil on a lathe, after which the rims are beaded (turned under to make them smooth). Before being enamelled, these "blanks" are fired and pickled. The firing removes the lubricating oil picked up in the spinning and beading process. The pickling—washing in acid, then in alkali—removes rust and other marks.

The blanks receive a base and top coat of enamel by hand dipping. Each time after drying they are fed manually into the oil-burning muffle furnaces for three or four minutes, where firing makes the surface glossy. If the utensil is to have a pattern on it, it is then taken to a spray booth where colours are applied through stencils made on the factory premises. A final baking completes the process. To get the most efficient use out of the furnaces, the factories operate on a 24-hour-a-day basis. During slack business periods, some furnaces may be shut down completely but the remaining ones continue on round-the-clock operation.

Material Imported

The factories prepare their own enamel. In addition to kaolin, linseed oil, glass and sand, a wide variety of chemicals are needed, most of which come at present from the United States, the United Kingdom and Europe. Electric arc smelters are used for the fritting process, which consists of mixing the ingredients, fusing them at high temperatures and, after cooling, breaking up the resulting product in ball mills to a fine powder which is aged before being used.

The enamelware export value of over HK$44 million in 1952 compares with HK$36 million in 1951 and only HK$20 million in 1950, according to Hong Kong trade statistics. As the following table shows, Indonesia is by far the most important export market, followed by Thailand, British Africa, Malaya and Burma.

Value of Enamelware Exports

Country	1951 HK$	1952 HK$
Indonesia	18,421,708	18,697,827
Thailand	1,570,540	8,995,505
British Africa	6,143,787	6,307,310
Malaya	5,862,513	2,321,794
Burma	40,800	1,801,058
Formosa	*	630,004
Pakistan	540,924	623,010
Ceylon	97,078	439,682
Philippines	437,121	348,395
Central America	219,019	238,313
Netherlands	*	219,103
British North Borneo	173,227	208,069
Australia	248,185	127,797
Others	2,374,613	3,281,377
Total	36,129,515	44,239,244

Source: Hong Kong Dept. of Commerce and Industry.
* Not available.

Enamelware from Japan has been giving the Hong Kong industry a good deal of competition, particularly in Indonesia. Early in 1952, ocean freight rates favoured Japanese exports but the rates have since been adjusted. At present, Hong Kong industry has a number of export orders on hand and the outlook is favourable.

—MILTON B. BLACKWOOD
Assistant Canadian Government Trade Commissioner

Commodity Notes

BRAZIL

Wheat—Brazil is producing almost 30 per cent of the wheat that it consumes, according to a survey of the country's wheat policy conducted by the Statistical Service of the Ministry of Finance. Imports of both wheat grain and wheat flour are falling, but domestic production is steadily increasing—from 15·8 per cent in 1943-45 to 29·6 per cent in 1950-52—São Paulo, June 8.

BRITISH GUIANA

Fibre—A company conducting research with fibre crops has issued its first report. Cultivation of 157 acres was begun in 1951 with heavy agricultural machinery; seven varieties of jute were planted by June 1952, and three gave yields sufficient to warrant large-scale trials this year; crop suitable for fibre was ribboned by machine and was approved by the British Jute Trade Association—Port of Spain, June 14.

DOMINICA

Bananas—Dominica's thriving banana industry will benefit from a ten-year contract recently signed by Antilles Products Ltd. This ensures that two 16½ knot banana ships will make regular calls from May on. In the last three years exports have risen from 350 thousand to 870 thousand bunches, and 1953 shipments will likely exceed the million mark. The United Kingdom and Eire take the bulk of the crop—Port of Spain, June 14.

MEXICO

Cotton—Mexico may have a slightly bigger cotton crop in 1953-54 than in 1952-53 (1,228,500 bales compared with 1,227,500 bales). Although 2,319,000 acres were planted a year ago, only 1·9 million acres were harvested. Growers report that 1,958,500 acres are being planted this year. In the Matamoros region, plans for the planting of 300 thousand more acres of non-irrigated land were halted by lack of rain—Mexico, D.F., June 20.

NETHERLANDS

Nitrogen—The 1952 output of nitrogen totalled 131,137 tons, corresponding to a total quantity of 622 thousand tons of fertilizer. The chemical plant of the State Mines is struggling with a serious shortage of skilled labour. It now employs 6,500 workers, twice as many as in 1945—The Hague, June 19.

NEW ZEALAND

Potatoes—Because of poor weather and insufficient acreage, New Zealand is again faced with a shortage of potatoes. The Government recently authorized the import from Australia of 3,000 tons, later increased to 6,000 tons. However, Australia also appears to be facing a shortage, and it is doubtful that the tonnage will be available—Wellington, June 12.

NORWAY

Metals and Minerals—The annual output of Falconbridge Nikkelverk, Kristiansand, has been increased from 11 thousand to 14,500 tons of nickel. The company has also begun to produce cobalt. Further extension works are in progress with the object of reaching an annual output of 16 thousand tons of nickel and 12 thousand tons of copper. Total shipments of iron ore from Narvik during 1952 amounted to nine million tons, a record figure. This record is expected to be broken in 1953. Norway's total output of sulphur pyrites in 1952 was about 750 thousand tons. In January production began at the new Skorovas Mines whose output is expected to reach 150 thousand tons of sulphur pyrites a year—Oslo, June 17.

UNITED KINGDOM

Coal—The cost of producing a ton of coal in the United Kingdom last year was £2 16s. 9d., an increase of 7s. 7d. a ton compared with 1951. Colliery proceeds rose by 6s. 1d. per ton, and the National Coal Board's accounts showed a deficit of £8·2 million. There was a disappointing decline in productivity. Employment increased by 22,500 but output by only 2·5 million tons. The Board says that the need to regain lost ground is a challenge to the industry—London, June 26.

UNITED STATES

Sawgrass Newsprint—The first test of resistance of Florida sawgrass newsprint was run on the *Daily Tallahassee Democrat Press*. The paper used for the test was made at the Herty Foundation, Savannah, Georgia, and proved very strong but rather stiff. This was the first press-run demonstration of sawgrass newsprint since a plant at Leesburg, Florida, failed 30 years ago. Because sawgrass newsprint can be produced much more cheaply than the standard type, newspaper publishers in the South watched this test with great interest but they were non-committal about the results. The Tallahassee firm which was given the exclusive sawgrass cutting rights hopes to build a small plant to produce pulp from sawgrass at Belle Glade, Florida—New Orleans, June 29.

WEST GERMANY

Machinery—The output of the German machine construction industry had a total value of DM9·7 billion in 1952, as against DM7·9 billion in 1951. Exports of machinery amounting to DM3·5 billion exceeded in value all other export groups. Machinery's share of total West German export trade was 21·2 per cent, as compared with 13 per cent before the war—Bonn, June 24.

Canadian Asbestos and Its Markets

HIGH UP ON THE LIST OF MINERALS which Canada produces comes asbestos fibre; today Canadian mines turn out approximately 70 per cent of the world's supply. But as a consumer, our rank is low; less than 5 per cent of the asbestos we produce is used here in Canada. This could raise problems if other countries discover commercial asbestos deposits and begin to compete with us for markets. But before going into that question, let's take a look at the asbestos industry today.

Production Up since '39

300

In 1951, Canadian asbestos mines produced close to a million tons of all grades of crude and milled fibres, valued at nearly $81·6 million. This represents a jump of almost 30 per cent since 1939, when the figure stood at 374 thousand tons. Over the years, two things have boosted the demand: consumption of fibre for the older industrial uses has expanded and, at the same time, new uses have been developed.

Technical developments have had an important influence—such as the evolution of asbestos friction materials from the all-woven type to the increasingly popular moulded types. This has profoundly affected the industry because moulded-type products make use of the more abundant shorter fibres and leave the longer and scarcer spinning-grade fibres for making white asbestos textile goods, such as asbestos cloth, tape, rope, roving, lagging, etc.

The ABC of Asbestos

All asbestos fibre produced in Canada is of the chrysotile variety but falls into several different categories:

- *Crudes 1 and 2 and group 3 (milled fibres): spinning fibres used to make white asbestos textile goods.*

- *Group 4 (milled fibres), known as shingle stock; used to make asbestos cement products such as pipe, flue pipe, roofing shingles, sheets, lumber, corrugated sheeting, asbestos magnesia pipe covering.*

- *Group 5 (milled fibres), known as paper stock; used for making paper and fibre board.*

- *Groups 6 and 7 (milled fibres) known as shorts; used as asbestos cements, protective coatings, moulded articles, etc., and as a filler in asphalt tile, greases and other products.*

- *Groups 8 and 9 (milled fibres) the shortest and lowest grades, known as sand and gravel; used chiefly for asbestos flooring and wall-tiles.*

Of the seven companies producing asbestos fibre in Canada today, five are subsidiaries of United Kingdom and United States firms. Together they account for more than 50 per cent of the asbestos fibres produced in Canada today. These five are all "vertical type" companies—that is, they mine and mill the raw materials and also fabricate the finished products. Any surplus not needed in their own manufacturing plants, either in Canada or abroad, or other grades which they do not use, they sell to other consumers. The remaining two companies mine and mill asbestos fibre for sale to consumers throughout the world.

The Export Outlook

Exports of asbestos fibres in 1951 totalled 942 thousand tons, valued at over $80·3 million; 75 per cent of this went to the United States. It enters that country duty-free and supplies a large U.S. manufacturing industry which, in 1951, turned out about $450 million worth of asbestos products (over $400 million for the home market). Asbestos fibre exports from the U.S. in 1951 reached 13 thousand tons valued at $3·2 million; in the main, these exports consisted of Canadian asbestos fibre which had been refined or blended in the U.S. and re-exported in these forms.

Several factors have a bearing on the outlook for asbestos fibre exports in the next few years. One is the intangible thing called goodwill. Asbestos fibres, particularly the longer fibres, have been in short supply these postwar years and Canadian mines could have obtained three or four times the prices they charged. It is a credit to the industry and important for the long-term outlook that the Canadian mines not only kept their prices at reasonable levels, but also did and are still doing an excellent job in the equitable distribution of available asbestos fibres.

As time goes on and asbestos deposits are found in other parts of the world, Canadian asbestos producers may face increased competition. The United States holds first place as a consumer and manufacturer of asbestos products and the proximity of Canadian supplies and the close financial and commercial relations between the two countries seem to assure a continuing market there. It is in Europe that competition for sales is likely to become keener and here transport charges would take on increased significance. However, as long as demand remains strong and Canada maintains her position as a major producer, exports to the European market should continue high.

Asbestos Fibre Products

When we turn from asbestos fibres to the products made from them, the story is a different one. Out of a total production of close to a million tons of asbestos fibres in 1951, all but 50 thousand tons was exported. But, of the $19·5 million worth of asbestos *products* manufactured in Canada in 1951, only $1·5 million worth was exported. In fact, Canada used in that year about $21·5 million worth of asbestos products and this included $3·4 million worth of imports.

Before going into the reasons for this situation, it might be helpful to look at the major uses for asbestos fibres. They fall generally into four groups, but one common feature is the stress placed on the fireproof and insulating properties of this mineral.

- *Asbestos building materials* such as asbestos cement shingles, siding, wallboard, sheets, pipe and asbestos magnesia pipe insulation and asphalt floor tiles.

- *Moulded asbestos automotive products* such as brake linings, clutch facings, blocks and also many other moulded products.

- *Asbestos papers* of varied composition for many uses, from pipe wrappings to table pads.

- *Asbestos cloth,* tape and rope, for such things as packings, safety clothing, fireproof curtains, electrical insulation, woven brake bands.

Altogether, the Canadian asbestos products industry uses less than 5 per cent of the asbestos fibres produced here, with companies making asbestos cement building materials and asbestos automotive products accounting for the major part. Here is the situation in more detail:

Asbestos Cement Building Products—Four companies are producing asbestos cement building products in Canada. Two of them have plants near the asbestos mines in Quebec; two of them are on the West Coast. Because the Canadian market for certain kinds of asbestos cement building products is rather small, it is more economic to import them than to produce them in Canada. These imports are estimated at over $500 thousand a year, and come almost entirely from the United States. Even counting in the cost of transporting the fibre across the border and then returning the finished products, it is still cheaper to buy from the American plants than it would be to make these products ourselves.

Moulded Asbestos Automotive Products—These constitute the largest part of the moulded-type asbestos products. Canadian requirements of moulded goods using asbestos fibres come largely from the 14 Canadian firms which manufacture them from the shorter and less expensive fibres. Imports, however, in 1951 totalled nearly one million dollars. Other moulded products using asbestos fibres include magnesia pipe insulation, plastics, rubber goods, etc.

Asbestos Papers—Three Canadian companies turn out asbestos papers for uses that range from oil pipe wrappings to dining-room table pads. The kinds and composition naturally vary with the use, and the few types not made here are imported from the U.S. Asbestos paper-makers in Canada use only a small amount of asbestos fibres compared with total production.

Textile Products—Canadian consumption of crude and milled spinning fibres is also small. Three companies manufacture what the trade knows as white textile asbestos goods, such as asbestos cloth, tape, rope, fillers, lapps, roving, wicks and yarn. Many of these are only intermediate or semi-manufactured products and in turn go into many other goods. All other firms in Canada handling white textile asbestos goods purchase semi-manufactured materials from these three companies or from suppliers or parent companies in the United States or the United Kingdom. Imports are estimated at over $500 thousand a year. In the United States, at least twelve plants produce textile asbestos goods.

Many of the firms playing an active part in the Canadian asbestos products industry are small and are actually distributors or jobbers, who often handle complementary lines as well. They fabricate some asbestos products, usually from semi-manufactured materials such as asbestos textiles, papers and boards, which they purchase either from the primary manufacturers of asbestos goods in Canada or from U.S. or U.K. manufacturers.

Exports and Imports

Canadian exports of asbestos fibre goods in 1951 had a value of about $1½ million, and consisted of brake linings, packings, and miscellaneous products. About 50 per cent of these exports went to the United States—but they represented only a tiny fraction of the $400 million worth of asbestos products which Americans used in 1951. Other markets for Canadian asbestos goods were the British West Indies, South America, Europe, and the Middle and Far East. In the last few years, the dollar shortage has meant some curtailment in sales to these areas.

Imports of asbestos fibre goods in 1951 far exceeded exports—$3·4 million as compared with $1·5 million, or about 15 per cent of the apparent Canadian consumption. They came, naturally enough, from the United States. For the most part, they were made up of asbestos packings, brake linings, clutch facings, building products, cloths, etc. of types, sizes or qualities not made here.

To sum up, the manufacture of asbestos fibre products in Canada is largely limited to Canadian requirements—and to products which it is economically practical to manufacture here rather than import. Exports remain relatively small.

—E. J. Bonkoff
Commodities Branch

General Notes

AUSTRALIA

Tax Agreement with U.S.—Australia and the United States have signed an agreement to abolish double taxation on incomes, estates and gifts. This agreement, which comprises three conventions, will come into force when the Australian and U.S. Governments ratify it. It is hoped that both countries will do so early enough for it to operate in the tax year beginning in July. The chief Australian objective is to encourage U.S. concerns to invest dollars in Australia by extending their activities there—Sydney, June 12.

CHILE

New Coinage—A bill has been passed by the Chilean Senate authorizing the minting of a new coinage. Coins of $10 and $5, to be denominated Condor and Half-Condor respectively, will be 90 per cent copper and 10 per cent aluminum and other metals. Copper coins will continue to be used for $1, 50 centavos and 20 centavos. The 50 centavos coin has not been minted for some time—Santiago, June 10.

NORWAY

Reforestation Program—A record 37 million trees were planted in Norway during 1952, but the figures planned for 1953 and 1954 are still higher—43 million and 50 million trees respectively. As an aid to the reforestation of the treeless districts in Western Norway, A/S Borregaard, one of the largest wood refining plants in Norway, has decided to grant loans totalling two million kroner. These loans are to run free of interest for 40 years and if repaid in timber, 25 per cent of the original amount will be deducted—Oslo, June 18.

UNITED KINGDOM

Overseas Trade—The value of United Kingdom exports in May (25 working days) was £211·7 million, compared with £214·8 million in April (24 working days). Imports amounted to £296·4 million against £293·3 million in April.

The excess of imports over total exports increased in May to £77·5 million, bringing the average for the first five months this year up to nearly £62 million. The corresponding figure last year was £63 million.

Exports to Canada, a record £16 million in April, fell in May to £14·8 million. Exports to the United States in May (£13 million) were practically the same as in April—London, June 22.

Colombia Grows More Cotton

Colombian growers now produce only one-third of the raw cotton which the domestic textile industry needs, but with government aid, they are working towards self-sufficiency.

BOGOTA—Colombia is today growing only 36 per cent of the cotton needed by its textile industry, even though the climate and soil in various regions are well suited to heavy cotton cultivation. Strenuous efforts, however, are being made to expand raw cotton production and particularly to grow the types required by Colombian mills, and thus cut down imports and conserve foreign exchange. Although complete self-sufficiency is not yet in sight, the acreage planted is expanding and the yield per acre increasing through the use of better seed. Already there is a surplus of short-fibre cotton and modest amounts are available for export. Medium and long-fibre varieties, however, still must be imported in quantity to meet local needs.

Large Domestic Consumption

Colombia has a surprisingly large and well-developed textile industry. Centred mainly in the city of Medellin, the industry boasts some modern mills which would be a credit to the North American industry. The domestic market for Colombian textile producers is protected by an import ban which covers all cotton manufactures with the exception of poplin for men's shirts. Besides the domestic market, the industry now sells to a number of neighbouring countries, including Ecuador, Venezuela, Panama, and Curaçao and Aruba in the Netherlands West Indies.

Figures for 1952 show the industry's consumption:

	Kilos	Percentage of total	Value in Pesos*
Domestic cotton	8,961,892	36	23,751,492
Foreign cotton	15,966,950	64	43,583,211
	24,928,842		67,334,712

* 2.50 Colombian pesos equal US$1.00.

The growing demand in the domestic market is giving impetus to greater cotton production even though the textile industry in Colombia, as throughout the world, has recently been suffering from a serious recession. To meet the present and anticipated demand, government and business groups are working together to promote the sowing of a greater acreage and to step up yield per acre and improve the quality of the product. The districts best suited to cotton cultivation include the interior Departments of Tolima, Caldas and Cundinamarca, and the Departments of the Atlantic Coast—Magdalena, Atlantico, Bolivar and Cordoba. The Government is distributing to the growers better types of cotton seed produced on its experimental farms at Armero in Tolima and at Palmira in Valle de Cauca, near the city of Cali. It is also taking steps to encourage the planting of the annual varieties required by the domestic industry, and to eradicate the less desirable perennial types which now

—W. H. Grace & Co.

Colombia has a large and well-developed cotton textile industry as this photograph, taken in the Tejicondor cotton mill at Medellin, shows. Medellin is someimes known as the "Manchester of Colombia".

form the largest part of the crop along the Atlantic coast. The Government of the Department of Tolima is constructing irrigation works which are expected to increase the local cotton crop by as much as 30 per cent. According to a press announcement in October 1952, the Caja Credito Agraria, a semi-official Colombian banking organization, has advanced one million pesos to the Institute of Cotton Development for eight years to finance the purchase of machinery and equipment for the producers.

In spite of all these measures, Colombian production of raw cotton still has a long way to go before national self-sufficiency can be achieved or international markets supplied. Total 1952 production is estimated at 13·2 million kilos, in contrast to total domestic consumption of 26·3 million kilos. In 1953 output may be larger than that in past years, but estimated national consumption is also expected to rise.

In the world setting, comparisons are even less favourable. According to U.S. Government figures for 1952, Colombia's raw cotton production compared with the output of neighbouring countries and of the United States was:

	(in metric tons)	
United States	3,413,630	
Brazil	408,000	(estimated)
Mexico	266,040	
Peru	95,350	
Colombia	10,562	

Nevertheless, the following figures are encouraging:

	1951		1952	
Area planted	36,184	hectares*	55,163	hectares
Production	6,474	metric tons	10,567	metric tons
Value	16,302,936	pesos	20,591,906	pesos
Production of fibre per hectare	179	kilos	192	kilos

* One hectare equals 2·471 acres.

This year, 64 thousand hectares will be planted to cotton and, using the better varieties of seed available, it is hoped that production per hectare will continue to increase.

With its advantages of soil and climate and its proximity to North American markets, Colombia seems admirably suited to become a large world producer and exporter of raw cotton. If the efforts of private and government organizations and of the cultivators bear fruit, Canadian and United States cotton firms may, before too long, find it advantageous to buy at least part of their raw material requirements from this country.

—JOHN E. LANCASTER
Assistant Canadian Government Trade Commissioner

Trade Commissioners on Tour

FROM TIME TO TIME Canadian Trade Commissioners return to Canada to bring themselves up-to-date on conditions in this country and to renew their contacts with businessmen here. Details of their itineraries appear regularly under this heading, as a service to exporters and importers who would like to discuss trading problems with them.

B. A. Macdonald, Commercial Counsellor for Canada in Bonn, Germany, begins a tour of Canada in Ottawa, July 6-10. His itinerary is:

Ottawa—July 6-10
Montreal—July 13-17
Three Rivers—July 20
Shawinigan—July 21
Quebec—July 22
Chicoutimi—July 23
Rimouski—July 24
Fredericton—July 27
Saint John—July 28-29
Halifax—July 30
Sydney—July 31
St. John's—August 3-4
Toronto—August 10-14
Hamilton—August 17-18
St. Catharines: Welland—August 19
Sarnia—August 20
Windsor: Walkerville—August 21
Winnipeg—August 24-26
Regina—August 27
Calgary—August 28
Edmonton—August 29-31
Vancouver: Victoria—September 9-16
Ottawa—September 28-October 2

T. R. G. Fletcher, Canadian Government Trade Commissioner in Hong Kong, began a tour of Canada in Ottawa, June 29-July 10. He will visit Montreal, August 17-26 and Toronto, August 27-September 4. His complete itinerary will be published later.

Richard Grew, Commercial Counsellor in New Delhi, India, began a tour of Canada in Ottawa on June 29. His itinerary is:

Vancouver—July 7-15
Windsor—July 20
London—July 21
Brantford—July 22
Hamilton—July 23
St. Catharines—July 24
Toronto—July 27-31
Montreal—August 3-7

A. W. Evans, Commercial Secretary for Canada in Havana, Cuba, began a tour of Canada in Toronto on June 1st. His itinerary is:

Saint John—July 6-8
Halifax—July 10-13
St. John's—July 14
Windsor: Walkerville—August 17
Chatham—August 18
London—August 19
Kitchener—August 20
Guelph—August 21
Hamilton—August 24-25
Victoria—August 31
Vancouver—September 1-3
Calgary—September 4
Edmonton—September 5
Saskatoon—September 7
Winnipeg—September 9

C. J. Van Tighem, Consul of Canada and Trade Commissioner in São Paulo, Brazil, began a tour of Canada on June 3 in Hamilton. His itinerary is:

Arvida—July 4-6
Vancouver—July 29-31

Businessmen may get in touch with these officers through the Board of Trade in Saskatoon, Chatham, Guelph, Montreal, Quebec, Saint John, Sydney and Halifax; the Chamber of Commerce in Calgary, Regina, Kitchener, London, Welland, St. Catharines, Windsor, Sarnia, Hamilton, Brockville, Arvida, Chicoutimi, Rimouski, Shawinigan and Three Rivers; the Canadian Manufacturers Association in Edmonton, Winnipeg and Toronto; the Dept. of Trade and Industry in Victoria; the Dept. of Industry and Development in Fredericton (295 Queen St.); and the Department of Trade and Commerce in Ottawa, Vancouver (355 Burrard St.) and St. John's (Stott Bldg.).

TOUR OF TERRITORY

W. Gibson-Smith, Canadian Government Trade Commissioner in Leopoldville, Belgian Congo, will visit Luanda and Angola in Portuguese West Africa during the first week of August. Businessmen interested in this area should write Mr. Gibson-Smith at Leopoldville as soon as possible.

Trade and Tariff Regulations

CUBA

Trade Agreement with West Germany—On June 11, 1953, a new trade agreement signed by Cuba and West Germany became effective. It is scheduled to remain in force until December 31, 1955.

The agreement provides for reductions in the most-favoured-nation rates of the Cuban tariff on many products to the levels enjoyed by similar United States goods. The products benefiting from the reduced rates are the same, in most instances, as those which were included in the 1951 agreement between Cuba and Germany, which was terminated on January 30, 1953. There are, however, about 31 new Cuban tariff reductions. All of these reduced rates will be extended to similar Canadian products under most-favoured-nation treatment. Among the items of interest are glassware; optical lenses; light bulbs; iron and steel bars and wire; padlocks; copper in bars and plates; aluminum in bars, plates and wire; a number of paper products; phonographs; musical instruments; alarm clocks; and unmanufactured synthetic resins. A complete list of the Cuban tariff rates affected may be obtained on request from the International Trade Relations Branch, Department of Trade and Commerce, Ottawa.

In return, Germany has agreed to purchase 500,000 tons of sugar from Cuba over the three year period 1953-1955. Germany agrees also to set aside $2 million yearly for purchases of Cuban leaf tobacco, cigars, rum, copper, chrome and other ores, hides, sisal, sponges, pineapples, grapefruit and other products.

GREECE

Luxury Tax—The Greek Ministry of Commerce announced on May 2 that the luxury tax, on which the rates were reduced effective April 29, is levied on importation on the duty-paid c.i.f. value of the goods concerned. Preliminary information obtained from the Greek authorities indicated that it would be assessed on the wholesale price in Greece. This information was published in a note in *Foreign Trade* of June 20 announcing the reductions in the Greek luxury tax.

The c.i.f. valuation is more advantageous to trade, since the amount of tax payable under this system may be calculated beforehand.

INDIA

Import Control Policy—A cable from the Acting Canadian Commercial Secretary, New Delhi, contains a resume of the Indian import control policy for the July-December 1953, licensing period. The announcement indicates some relaxation since some items previously banned are now permitted importation from the dollar area. The import quotas for certain other items are increased.

According to this advice, the following items, previously banned, may now be imported from the dollar area. The percentage quota allowed each item is calculated on imports for half of the basic year applicable: electrodes and rod, wire, foil and strip for gas welding—20 per cent; domestic refrigerators, complete—20 per cent; typewriters, complete—33 per cent; industrial machinery, other than for jute and textiles—75 per cent; dairy and poultry farming appliances—25 per cent; wetting out agents—10 per cent; vulcanized fibre rods and tubes—25 per cent; condensed milk—40 per cent; infants' milk food—40 per cent; farinaceous foods, canned or bottled—20 per cent; breakfast foods—10 per cent; second-hand woollen clothing—50 per cent; ashwood oars—75 per cent; steel belt lacing—10 per cent.

For the following commodities, the percentage quota has been increased as shown: industrial exhaust fans and blowers—100 per cent to 125 per cent; jute machinery—50 per cent to 75 per cent; textile machinery—50 per cent to 75 per cent; air conditioning machinery—10 per cent to 50 per cent; other types of refrigeration machinery—50 per cent to 100 per cent; firefighting equipment, except fire extinguishers—10 per cent to 50 per cent; printers' ink—20 per cent to 40 per cent; cellulose acetate butyrate—20 per cent to 75 per cent; filtering aids, like hyflosupercel—50 per cent to 75 per cent; powdered milk—20 per cent to 40 per cent; penicillin preparations—100 per cent to 150 per cent; hardware and tools—20 per cent to 30 per cent.

The percentage quota remains unchanged for the following commodities: non-ferrous semi-manufactures, rubber tires and tubes, machinery parts, industrial sewing machines, coal tar dyes, portable air or gas compressors.

Imports of certain fabricated iron and steel sheets, sewing machine parts and brake fluids are now banned.

JAMAICA

Footwear—Importers in Jamaica were advised on June 18 that permits for imports of footwear consisting wholly or partly of leather or imitation leather, for the six months' period ending December 31, 1953, will be issued against quotas calculated on the same basis used for quotas during the period ending June 30, 1953. That is, the aggregate quantities of footwear that may be imported will be: men's, 84,000 pairs; women's, 45,000 pairs; children's, 32,000 pairs.

The official notice adds that any future reductions in permitted import quantities will be made at the expense of the import allocation and, should any general increases become necessary, they will be allocated on the usage percentage. Also. if it becomes necessary to extend quantitative restrictions beyond December 31, wider recognition will likely be given to usage performance in the calculation of quotas.

In special cases of hardship, or to take care of new traders, permits may be issued for a small additional allotment.

Foreign Trade Service Abroad

† Indicates a change since previous publication.

Bentley's Second Phrase Code is used by Canadian Trade Commissioners.

Territory	Officer	City Address	Mail and Cables, Office Telephone
Argentina Paraguay Uruguay	C. S. Bissett, Commercial Counsellor Acting Agricultural Secretary	Canadian Embassy, Bartolome Mitre 478, Buenos Aires	*Mail:* (City Address) *Cable:* Canadian *Tel.:* 33-8237
Australia (Capital Territory, New South Wales, Queensland, Northern Territory) Dependencies	C. M. Croft, Commercial Counsellor for Canada	City Mutual Life Building, 60 Hunter Street, Sydney	*Mail:* P.O. Box 3952 G.P.O. *Cable:* Canadian *Tel.:* BW 9351
Australia (Victoria, South Australia, Western Australia, Tasmania)	R. W. Blake, Commercial Secretary for Canada and Agricultural Secretary	83 William Street, Melbourne	*Mail:* (City Address) *Cable:* Canadian *Tel.:* MU 4716
Belgian Congo Angola, French Equatorial Africa	W. Gibson-Smith, Canadian Government Trade Commissioner	Forescom Building, Leopoldville 1,	*Mail:* Boîte Postale 373 *Cable:* Canadian *Tel.:* 2706
Belgium Luxembourg	T. J. Monty, Commercial Secretary	Canadian Embassy, 35 rue de la Science, Brussels	*Mail:* (City Address) *Cable:* Canadian *Tel.:* 11-33-88
Brazil	C. R. Gallow, Commercial Secretary	Canadian Embassy, Edificio Metropole, Av. Presidente Wilson 165, Rio de Janeiro	*Mail:* Caixa Postal 2164 *Cable:* Canadian *Tel.:* 42-4140
Brazil	C. J. Van Tighem, Consul of Canada and Trade Commissioner	Canadian Consulate, Edificio Alois, Rua 7 de Abril 252, Sao Paulo	*Mail:* Caixa Postal 6034 *Cable:* Canadian *Tel.:* 36-6301
Ceylon	†Acting Canadian Government Trade Commissioner	Galle Face Hotel, Colombo	*Mail:* P.O. Box 1006 *Cable:* Canadian *Tel.:* 5876
Chile	M. R. M. Dale, Commercial Secretary	Canadian Embassy, 6th Floor, Av. General Bulnes, 129, Santiago	*Mail:* Casilla 771 *Cable:* Canadian *Tel.:* 64189
Colombia Ecuador	W. J. Millyard, Commercial Secretary	Canadian Embassy †Avenida Jimenez No. 7-25 Office 613, Bogota	*Mail:* Apartado 1618 *Airmail:* Apartado Aereo 3562 *Cable:* Canadian *Tel.:* 12-251
Cuba	A. W. Evans, Commercial Secretary	Canadian Embassy, Edificio Motor Centre, Calle Infanta 16, Havana	*Mail:* Apartado 1945 *Cable:* Canadian *Tel.:* UO-9457
Dominican Republic Haiti, Puerto Rico	R. E. Gravel, Canadian Government Trade Commissioner	Edificio Copello 410, Calle El Conde, Ciudad Trujillo	*Mail:* Apartado 451 *Cable:* Canadian *Tel.:* 5318
Egypt Aden, Sudan, Cyprus, Ethiopia, Jordan, Saudi Arabia	Acting Canadian Government Trade Commissioner	Osiris Building, Sharia Walda, Kasr-el-Doubara, Cairo	*Mail:* P.O. Box 1770 *Cable:* Canadian *Tel.:* 23110
France Algeria, French Morocco, French West Africa, Tunisia	R. G. C. Smith, Commercial Counsellor for Canada	3 rue Scribe, Paris	*Mail:* (City Address) *Cable:* Canadian *Tel.:* OPEra 42-30
Germany Federal Republic	B. A. Macdonald, Commercial Counsellor	Canadian Embassy, 22 Zitelmannstrasse, Bonn	*Mail:* (City Address) *Cable:* Canadian *Tel.:* Bonn 21971
Germany	Wm. Van Vliet, Agricultural Secretary		

Territory	Officer	City Address	Mail and Cables, Office Telephone
Greece Israel, Turkey	H. W. Richardson, Commercial Secretary	Canadian Embassy, 31 Vassilissis Sophias Ave., Athens	*Mail:* (City Address) *Cable:* Canadian *Tel.:* 72-853
Guatemala Costa Rica, El Salvador, Honduras, Nicaragua, Panama and Canal Zone	J. C. Depocas, Canadian Government Trade Commissioner	28, 5a Avenida Sud, Guatemala City	*Mail:* P.O. Box 400 *Cable:* Canadian *Tel.:* 5590
Hong Kong China, Indo-China, Macao, Taiwan	T. R. G. Fletcher, Canadian Government Trade Commissioner	Hong Kong and Shanghai Banking Corporation Bldg., Hong Kong	*Mail:* P.O. Box 126 *Cable:* Canadian *Tel.:* 28336
India	Richard Grew, Commercial Counsellor	Office of the High Commissioner for Canada, 4 Aurangzeb Road, New Delhi	*Mail:* P.O. Box 11 *Cable:* Canadian *Tel.:* 40191
India Burma	B. I. Rankin, Commercial Secretary for Canada	Gresham Assurance House, Mint Road, Bombay	*Mail:* P.O. Box 886 *Cable:* Canadian *Tel.:* 20672
Ireland	T. G. Major, Commercial Counsellor	†Canadian Embassy 66 Upper O'Connell St., Dublin	*Mail:* (City Address) *Cable:* Canadian *Tel.:* 44251
Italy Libya, Malta, Yugoslavia	S. G. MacDonald, Commercial Counsellor	Canadian Embassy, Via Saverio Mercadante 15, Rome	*Mail:* (City Address) *Cable:* Canadian *Tel.:* 846-842
Italy	C. F. Wilson, Agricultural Counsellor		
Italy	M. S. Strong, Commercial Secretary (Fisheries)		
Jamaica Bahamas, British Honduras	M. B. Palmer, Canadian Government Trade Commissioner	Canadian Bank of Commerce Chambers, Kingston	*Mail:* P.O. Box 225 *Cable:* Canadian *Tel.:* 2858
Jamaica	E. M. Gosse, Canadian Trade Commissioner (Fisheries)		
Japan Korea	J. C. Britton, Commercial Counsellor	Canadian Embassy Tokyo	*Mail:* (City Address) *Cable:* Canadian *Tel.:* 48-4116
Lebanon Iraq, Syria	G. F. G. Hughes, Canadian Government Trade Commissioner	Centre Urbain Emir Beshir, Bâtiment A1, Rue Emir Beshir, L'Azarieh, Beirut	*Mail:* Boîte Postale 2300 *Cable:* Canadian
Mexico	M. T. Stewart, Commercial Counsellor	Canadian Embassy, Edificio Internacional, Paseo de la Reforma, Mexico, D.F.	*Mail:* Apartado 126-Bis *Cable:* Canadian *Tel.:* 36-27-90
Netherlands	J. A. Langley, Commercial Counsellor	Canadian Embassy, Sophialaan 1-A, The Hague	*Mail:* (City Address) *Cable:* Canadian *Tel.:* 18-51-06
Netherlands Belgium, Denmark, Luxembourg	Acting Agricultural Secretary		
New Zealand Fiji, Western Samoa	L. S. Glass Commercial Secretary	Office of the High Commissioner for Canada, Government Life Insurance Bldg., Wellington	*Mail:* P.O. Box 1660 *Cable:* Canadian *Tel.:* 70-644
Norway Denmark, Greenland	J. L. Mutter, Commercial Secretary	Canadian Legation, Fridtjof Nansens Plass 5, Oslo	*Mail:* (City Address) *Cable:* Canadian *Tel.:* 33-30-80
Pakistan Afghanistan, Iran	A. P. Bissonnet, Commercial Secretary	Office of the High Commissioner for Canada, Hotel Metropole, Victoria Rd., Karachi	*Mail:* P.O. Box 3703 *Cable:* Canadian *Tel.:* 5826

Territory	Officer	City Address	Mail and Cables, Office Telephone
Peru Bolivia	H. J. Horne, Commercial Secretary	Canadian Embassy, Edificio Boza, Carabaya 831, Plaza San Martin, LIMA	*Mail:* Casilla 1212 *Cable:* CANADIAN *Tel.:* 71950
Philippines	F. H. Palmer, Consul General of Canada and Trade Commissioner	Ayala Building, Juan Luna Street, MANILA	*Mail:* P.O. Box 1825 *Cable:* CANADIAN *Tel.:* 3-33-35
Portugal Azores, Madeira	L. M. Cosgrave, Commercial Counsellor	Canadian Legation, Avenida de Praia da Vitoria, 48—1°D., LISBON	*Mail:* (City Address) *Cable:* CANADIAN *Tel.:* 53117
Singapore Brunei, Federation of Malaya, Indonesia, North Borneo, Sarawak, Thailand	D. S. Armstrong, Canadian Government Trade Commissioner	Room D-5, Union Building, SINGAPORE	*Mail:* P.O. Box 845 *Cable:* CANADIAN *Tel.:* 7739
South Africa (Natal, Transvaal) Southern Rhodesia, Northern Rhodesia, Nyasaland, Mozambique, Kenya, Tanganyika, Uganda, Zanzibar	C. B. Birkett, Canadian Government Trade Commissioner	Mutual Building, Harrison Street, JOHANNESBURG	*Mail:* P.O. Box 715 *Cable:* CANTRACOM *Tel.:* 33-2628
South Africa (Cape Province, Orange Free State), Southwest Africa, Mauritius, Madagascar	K. F. Noble, Canadian Government Trade Commissioner	Grand Parade Centre Bldg., Adderley Street, CAPE TOWN	*Mail:* P.O. Box 683 *Cable:* CANTRACOM *Tel.:* 2-5134/5
Spain Balearic Islands, Canary Islands, Gibraltar, Rio de Oro, Spanish Morocco, Tangier	E. H. Maguire, Canadian Government Trade Commissioner	70 Avenida Jose Antonio, MADRID	*Mail:* Apartado 117 *Cable:* CANADIAN *Tel.:* 21-28-32
Sweden Finland	F. W. Fraser, Commercial Counsellor	Canadian Legation Strandvagen, 7-C, STOCKHOLM	*Mail:* P.O. Box 14042 *Cable:* CANADIAN *Tel.:* 67-92-15
Switzerland Austria, Czechoslovakia, Hungary	Yves Lamontagne, Commercial Counsellor	Canadian Embassy Kirchenfeldstrasse 88, BERNE	*Mail:* (City Address *Cable:* CANADIAN *Tel.:* 4-63-81
Trinidad Barbados, Windward and Leeward Islands, British Guiana, Dutch Guiana, French Guiana, French West Indies	P. V. McLane Canadian Government Trade Commissioner	Colonial Building, 72 South Quay, PORT-OF-SPAIN	*Mail:* P.O. Box 125 *Cable:* CANADIAN *Tel.:* 4787
United Kingdom (South of England, East Anglia, Scotland), Iceland, British West Africa (Gambia, Gold Coast, Nigeria, Sierra Leone)	R. P. Bower, Commercial Counsellor R. Campbell Smith, Commercial Secretary	Office of the High Commissioner for Canada, Canada House, Trafalgar Square, LONDON, S.W.1	*Mail:* (City Address) *Cable:* SLEIGHING *Tel.:* Whitehall 8701
United Kingdom	D. A. B. Marshall, Commercial Secretary (Agricultural)		
United Kingdom	R. D. Roe, Commercial Secretary (Timber)		*Cable:* TIMCOM

Territory	Officer	City Address	Mail and Cables, Office Telephone
United Kingdom (Midlands, North England, Wales)	M. J. Vechsler, Canadian Government Trade Commissioner	Martins Bank Building, Water Street, LIVERPOOL	*Mail:* (City Address) *Cable:* CANADIAN *Tel.:* Central 0625
United Kingdom (Northern Ireland)	T. G. Major, Canadian Government Trade Commissioner	36 Victoria Square, BELFAST	*Mail:* (City Address) *Tel.:* 21867
United States Delaware, Maryland, Virginia, West Virginia	Commercial Counsellor	Canadian Embassy, 1746 Massachusetts Ave., N.W., WASHINGTON. 6, D.C.	*Mail:* (City Address) *Cable:* CANADIAN *Tel.:* DEcatur 2-1011
United States	Dr. W. C. Hopper, Agricultural Counsellor		
United States (Connecticut, New Jersey, Pennsylvania, New York), Bermuda	A. E. Bryan, Deputy Consul General of Canada and Trade Commissioner	Canadian Consulate General, 620 Fifth Ave., NEW YORK CITY	*Mail:* (City Address) *Cable:* CANTRACOM *Tel.:* JUdson 6-2400
United States	M. B. Bursey, Consul of Canada and Trade Commissioner (Fisheries)		
United States (Massachusetts, Maine, Rhode Island, Vermont, New Hampshire)	G. S. Patterson, Consul General of Canada	Canadian Consulate General, 532 Little Building, 80 Boylston Street, BOSTON 16	*Mail:* (City Address) *Cable:* CANADIAN *Tel.:* HAncock 6-4320
United States (Illinois, North Dakota, South Dakota, Minnesota, Wisconsin, Indiana, Iowa, Kansas, Nebraska, Kentucky, Missouri)	D. S. Cole, Consul General of Canada	Canadian Consulate General, Chicago Daily News Bldg., 400 West Madison Street, CHICAGO 6	*Mail:* (City Address) *Cable:* CANADIAN *Tel.:* STate 2-7312
United States (Michigan, Ohio)	B. C. Butler, Consul of Canada and Trade Commissioner	Canadian Consulate, 1035 Penobscot Building, DETROIT, 26	*Mail:* (City Address) *Cable:* CANADIAN *Tel.:* WOodward 5-2811
United States (City of Los Angeles, Southern California, Arizona)	W. K. Wardroper, Vice Consul of Canada	Canadian Consulate General 510 West Sixth Street, LOS ANGELES 14	*Mail:* (City Address) *Cable:* CANADIAN *Tel.:* VAndike 7114
United States (Louisiana, Texas, Oklahoma, Arkansas, Mississippi, Tennessee, Alabama, North Carolina, South Carolina, Georgia, Florida)	G. A. Newman, Consul of Canada and Trade Commissioner	Canadian Consulate. 215-217 International Trade Mart, NEW ORLEANS	*Mail:* (City Address) *Cable:* CANADIAN *Tel :* RAymond 2136
United States (Northern California, Montana, Oregon, Idaho, Washington, Wyoming, Nevada, Utah, Colorado, New Mexico), Hawaii	C. C. Eberts, Consul General of Canada	Canadian Consulate General, 3rd Floor, Kohl Building, 400 Montgomery Street, SAN FRANCISCO 4	*Mail:* (City Address) *Cable:* CANADIAN *Tel.:* SUtter 1-3039
Venezuela Netherlands Antilles	J. A. Stiles, Commercial Secretary	Canadian Embassy, Edificio Pan American, Puente Urapal, CARACAS	*Mail:* Apartado 3306 *Cable:* CANADIAN *Tel.:* 55818
Venezuela Colombia	Acting Agricultural Secretary		

Foreign Exchange Rates

The following nominal quotations may prove useful in checking prices. Canadian traders should consult their banks before making any firm commitments.

Conversions into Canadian dollars have been made at cross rates with sterling or the United States dollar on the date shown.

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

When several rates are indicated, the rate applicable depends on the commodity traded. Information on the rate for any specific commodity may be obtained from the International Trade Relations Branch, Department of Trade and Commerce, Ottawa.

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

For conversion to United States dollar equivalents multiply by 1·005.

Country	*Unit*	*Type of Exchange*	*Canadian dollar equiv. June 25*	*Notes (See below)*
Argentina	Peso	Preferential buying	·1327	
		Basic buying	·1990	
		Preferential selling	·1990	(1)
		Basic selling	·1327	
		Free	·07162	
Austria	Schilling		·03827	
Australia	Pound		2·2400	
Belgium-Luxembourg & Belgian Dependencies	Franc		·01991	
Bolivia	Boliviano	Official	·00524	
British West Indies	Dollar		·5833	(3)
	Pound		2·8000	(4)
	Dollar	Br t. Honduras	·7000	
Brazil	Cruzeiro	Official	·05378	tax 8%
		Free	·02186	(2)
Burma	Kyat		·2100	
Ceylon	Rupee		·2100	
Chile	Peso	Official	·03320	(1)
		Commercial	·01657	
		Free	·00904	
Colombia	Peso	Basic	·3980	tax 3% (2)
		Coffee buying	·4261	
Costa Rica	Colon	Official	·1772	(5)
		Free	·1502	*May 15
Cuba	Peso		·9950	tax 2%
Czechoslovakia	Koruna		·1382	
Denmark	Krone		·1441	
Dominican Republic	Peso		·9950	
Ecuador	Sucre	Official	·06633	(6)
		Free	·05725	
Egypt	Pound		2·8572	
Fiji	Pound		2·5225	
Finland	Markka		·00433	
France	Franc		·00284	
French Africa	Franc		·00569	
French Pacific	Franc		·01565	
Germany	D Mark		·2369	
Greece	Drachma		·000033	
Guatemala	Quetzal		·9950	
Haiti	Gourde		·1990	
Honduras	Lempira		·4975	
Hong Kong	Dollar	Free	·1643	*June 12
Iceland	Krona	Official	·06110	
		Special buying	·04707	
		Special selling	·03810	
India	Rupee		·2100	
Indonesia	Rupiah	Basic	·08728	(7)
		Dollar certificate	·00188	*May 15

* Latest available quotation date.