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In This Issue

Regular Features

COVER SUBJECT—Canadian certified seed potatoes being loaded aboard the S.S. *Tacoma* during the early part of November for shipment from Saint John, N.B., to Montevideo, Uruguay. This ship, which is owned by the Government of Uruguay, took on a record consignment of 120,000 crates for this South American republic. Dr. Carlos J. Berta, chief of the potato division, supervised loading operations in Saint John and inspected the condition of the cargo on the voyage south. Nearly 500,000 crates of certified seed potatoes were shipped to Argentina and Uruguay from Saint John during a period of four weeks in the latter part of October and beginning of November.

Courtesy J. T. Knight Company, Limited.

Increased Per Capita Production and Removal of Obstacles to Trade are Aims of Charter

Tariff barriers, quantitative restrictions, exchange control, monopolies, cartels and discriminations of all kinds presently under review at Cuba, where draft charter of International Trade and Employment Organization is being considered by delegations from 59 countries.

(Editor's Note—This article on the International Trade Charter was published by the London *Times,* and is reproduced in *Foreign Trade* through the courtesy of the Southam Newspapers.)

THE minute care bestowed on the revision of the draft Charter of the International Trade and Employment Organization during the last four and a half months expresses something more than a desire for meticulous textual accuracy. It reflects the great transformation that is taking place in the conditions of economic life throughout the world, the change in political groupings and coming into existence of new states, the urge for economic development and the yearning for social justice. At every step there could be felt vibrations of the profound crisis that is affecting the economic structure of society and the realization of the ease with which economic difficulties may transform themselves into violent industrial and political upheavals. It reflects also a desire on the part of a powerful group of nations to break away from the narrow nationalism of the inter-war period.

The remedy, as seen by its authors, is an organization leading by gradual stages to the removal of obstacles to the international movement of goods, capital, and labour, and the development and expansion of international trade. Increased production implies increasing markets, which in turn point to the industrial and economic development of the undeveloped and under-developed countries, which may be taken to include the restoration and reconstruction of those which suffered in the late war. Improvement in the standard of living depends on these conditions and to achieve them international co-operation is indispensable. Hence the emphasis in the Charter on economic measures aiming at increased production *per capita* of the population as a means of raising the level of real income of the producers.

Hindrances to Trade

Increasing production renders increasing markets essential. It is sought to break down hindrances to international trade such as tariff barriers, quantitative restrictions, exchange control, monopolies, cartels, and discriminations of all kinds, to regulate such commercial weapons as dumping, customs formalities, and subsidies, and to introduce into state trading and inter-governmental commodity arrangements rules and principles whereby their adverse effect on international trade shall be minimized. And since each of these has its origin in some dire necessity—such as the necessities into which Great Britain and other countries have now temporarily come in consequence of the dearth of dollars—the Charter has sought in each case to take into account the possibility that it may be unavoidable, by defining the limits to which they are permissible and the remedies against abuse. It is in effect a code of economic conduct, intended to exercise an influence on long-established commercial and trading policies. It is not without sanctions, for it can authorize the withholding of advantages and in the last resort expel a member who persistently flouts the code. No doubt it will be closely scrutinized in the parliaments of the member states, and both because of this and because of the present world dislocation, some time must elapse before it can come into operation.

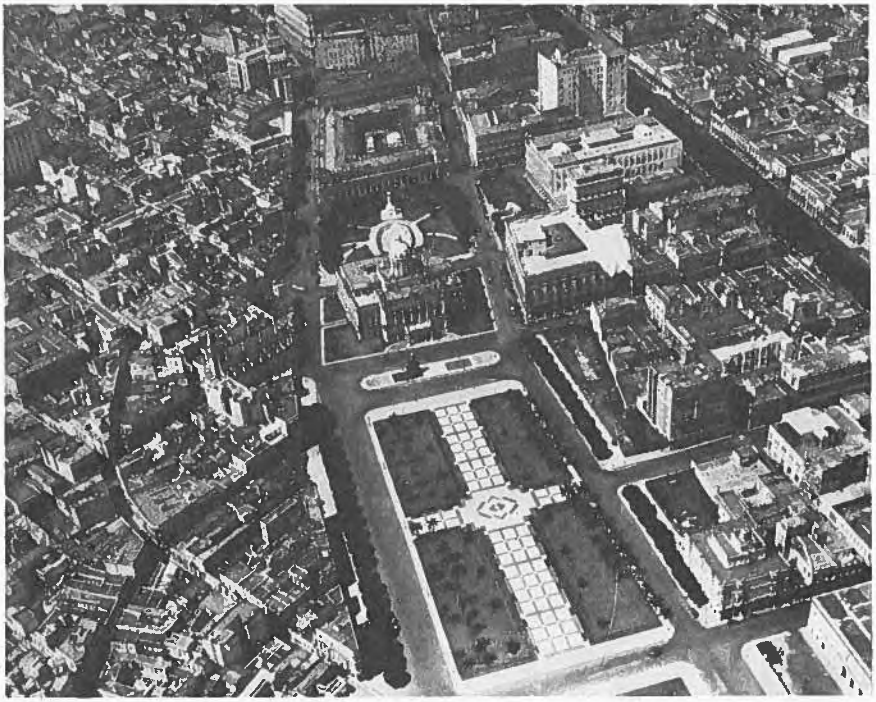
The Charter provides for international action to supplement domestic measures taken to raise the levels of employment. A new phrase recognizes that one of its objectives is "a large and steadily growing volume of production as well as of demand and employment," in other words that employment policy should be productive policy. Full employment without a correspondingly large foreign trade would mean a comparatively low standard of living. Here, and later, the Charter touches only too topically upon maladjustments in the balance of payments and the impact of depressions as they affect employment.

Undeveloped Resources

The Charter encourages action by all affected members before the member in difficulty seeks to remedy his position by resorting to trade restrictions. A new provision is that members should seek to avoid measures which would create balance of payment difficulties for any country, and not merely for members' countries. Remedial action is to be taken with due regard for the desirability of employing methods which expand rather than contract international trade. The Organization may initiate consultation among its members with a view to the taking of measures against the spread of a decline of employment, production, and demand, and it provides safeguards for members subject to external deflationary pressure.

The undeveloped resources of the world and the economic expansion to be derived from them are regarded in the Charter as one of the chief means in the long run of expanding the volume of world trade and, therefore, a matter of common interest. In taking into account the needs of countries in the stage of industrial development the important questions arise of foreign investment and the application of protective devices. A new article has been added emphasizing the importance of international capital investment as a means of promoting economic development and social progress. It advocates that members should provide the widest opportunities for investment, combined with the greatest security, and it applies to investment the most-favoured-nation principle in that members undertake not to impose, either directly or indirectly, any requirements on the investments of non-nationals which are appreciably more onerous than those imposed on their own nationals or upon the nationals of third countries. They are also required to make just compensation for such interests taken over by the state or placed under state management or occupation.

The plea of the undeveloped countries that special government assistance might be needed to develop particular industries was recognized to be sound. Details have been added to indicate how and in what circumstances the Organization shall release members from the general obligation under the Charter not to impose protective measures of any kind. A new article has been added covering preferential arrangements for economic development, by which it is recognized that special circumstances may justify new preferential arrangements between two or more countries in the interests of programs of economic development or reconstruction in one or more of such countries, but it is to be subject to permission from the Organization.



Havana, where 59 countries are now discussing the I.T.O. draft charter.
Cuban Tourist Commission Photo.

The key to the whole Charter is the chapter relating to tariffs. It is the longest, with 25 articles covering such matters as the most-favoured-nation clause, tariffs and preferences, tariff valuation and other technical matters of international trade, the elimination of quantitative restrictions, exchanges, state trading and monopolies, and relations with non-member states. It is in this part of the charter that the majority of the escape clauses occur. Its revision was an extremely complicated and technical task. The most-favoured-nation clause was left practically unchanged. It has to be as clear as possible, and it was felt that the definition could not be improved upon by the inclusion of exceptions. Certain existing preferences are allowed for in a sub-clause, including those of the British Commonwealth and colonial territories, though the permitted margins are carefully defined. A subsequent article instructs members to enter into and carry out negotiations directed to the substantial reduction of tariffs and to the elimination of preferences, the results of which are to be incorporated in the General Agreement on Tariffs and Trade. This is the basis of the tariff talks still in progress. The principal escape clause, which allows member Governments to cancel tariff reductions when serious injury threatens a particular industry, is left unchanged. It was found impossible to fix a "ceiling" for tariffs as too many considerations had to be taken into account.

In view of the prevalence of the practice of using restrictions of trade to correct balance of payment difficulties, and the gravity of such difficulties in many countries as a result of the war, great efforts were made to write into the Charter a set of rules under which members might, in special circumstances, restrict imports. The subject of restrictions proved to be one of the most delicate. They were regarded as a means of natural defence and in certain circumstances inevitable, and the main purpose of the rules is to ensure that they are not allowed to disorganize the international trade system. They attempt to provide safeguards against undue discrimination and against forestalling and speculation.

Control of Monopoly

On the question of state trading it was found that a clear-cut definition was impossible. Account had to be taken of trade with and within every type of economic system, from the completely free system of the United States to the monopolist organization of the U.S.S.R. There is nothing in the Charter which prevents members from concluding commercial treaties with non-members, though if an existing treaty were in conflict with the Charter, the member would be obliged to terminate it. The Charter pledges them not to make exclusive concessions which benefit one country only at the expense of another.

The chapter relating to restrictive business practices has been closely revised and much simplified. It recommends, but does not specify, appropriate measures to prevent business practices affecting international trade which restrain competition, limit access to markets or foster monopolistic control, wherever they have harmful effects on the expansion of production or trade. The procedure envisaged is by complaint, investigation and consultation, while remedial action is left to member states affected. A new clause provides that services such as transport, telecommunications, insurance and banking are substantial elements of international trade and that any restrictive business practices in relation to them may have harmful consequences.

The purpose of the chapter on inter-governmental commodity agreements is to prevent such arrangements from obstructing trade, to provide safeguards by limiting the use of such arrangements to conditions in which they are justified, and to lay down the principles to which they must conform. It specifies the types of commodities with which it deals, and a new article defines the extent of its application to non-primary commodities, which are to be subjected to conditions at least as stringent as those for primary products. It excludes highly manufactured goods. The final chapter lays down the structure, staffing and voting system of the Organization and provides for the setting up of a tariff committee to watch over the fulfilment of tariff undertakings and commissions on commercial policy, business practices, and commodities.

The delegations to the Preparatory Committee have had no easy task. The Charter had to be sufficiently broad in its terms to cover the special problems of a diversity of countries with different economic systems; it had to guard against defeating its general purpose by the inclusion of exceptions to meet particular cases; and it had to provide its own machinery for enforcing its principles. Finally, although the Charter provides for members and non-members, its all-embracing provisions can only have been made on the assumption that the bulk of the countries engaged in world trade are going to join the Organization. If the Charter is acceptable to the states members of the Preparatory Commission, who represent geographically and economically so considerable a proportion of the world's trade, it is reasonable to assume that other countries in similar positions will accept it also. The large doubt in present circumstances is whether the nature of the world financial and commercial crisis will permit a beginning to be made on a march forward which all the nations represented at Geneva wish to make.

Canada Buys More Than it Sells In Two Way Trade With Spain

Economy of country based on agriculture—Methods of cultivation primitive—Mining an important industry—Manufacturing industry late in developing—Import duties highly protective—Foreign commerce limited—Balance of trade with Canada heavily in Spain's favour.

Prepared by European Section, Foreign Trade Service

SPAIN, a national state in the extreme southwest of Europe, comprises about eleven-thirteenths of the Iberian Peninsula. It is separated on the north from France by the Pyrenees Mountains, which form a geographical barrier of some 421 miles in length from the Mediterranean Sea to the Bay of Biscay. The Bay of Biscay coastline is 473 miles long from the French border to Cape Finisterre (city of La Coruna) on the northwest; from that point along the Atlantic coastline of Spain to the north border with Portugal on the Minho River and from the mouth of the Quadiana River in the Gulf of Cadiz to Gibraltar is approximately 442 miles.

The intervening Spanish-Portuguese border, about 630 miles in length from the mouth of the Minho to that of the Quadiana in the south, is not marked by any prominent geographical barriers. To the south and east of Spain the Mediterranean coastline is approximately 1,033 miles in length.

The total area, including Continental Spain, the Balearic Islands in the Mediterranean and the Canary Island Provinces and Las Palmas and Centra Cruz de Tenerife, in the Atlantic Ocean, just off the coast of northwest Africa, is about 196,000 square miles. Spanish North African possessions aggregate 11,257 square miles, and West African possessions about 111,639 square miles.

Climatic Conditions Vary Considerably

The interior of the peninsula consists of elevated tableland, surrounded and traversed by mountain ranges. The centre of the country consists of the high plateau regions of New Castile, between the Betica Mountains and the Guadarrana Mountains, and Old Castile to the north of the latter mountain chain, which are approximately 3,000 feet above sea-level.

Due to the physical features, there are considerable variations in climate. In the central and southern areas, rainfall seldom exceeds twenty inches a year, although there is a considerably higher precipitation along the Bay of Biscay and in the Galician provinces. Beyond the north and northwestern coastal areas, rain occurs almost exclusively in the winter months. Throughout almost the entire country extreme drought prevails during the summer months. Mean daily temperature in central, south and eastern Spain is around 68° F. for four months of the year and 50° F. for the remaining eight months. Although some higher mountain chains are snow-capped throughout the year, even in these areas subzero temperatures are seldom recorded in winter.

Madrid and Barcelona Largest Cities

The estimated population of Spain as of July 1, 1943, was 26,941,166, or approximately 134 to the square mile, the majority residing along the coastal fringe. The three largest cities are Barcelona and Madrid, each with slightly more than 1,000,000 inhabitants, and Valencia with more than 450,000.

Although Spain is rich in mineral resources, agriculture is the basis of Spain's economy. The country is generally fertile and well adapted to the cultivation of olives, oranges, lemons, almonds, pomegranates and dates. Other agricultural products comprise wheat, barley, maize, oats, rice, and hemp and flax of the best quality.

In general, agricultural methods were, and still are, primitive, as much as three-quarters of the total crop of cereals being reaped and threshed entirely by hand. Even the simplest forms of agricultural machinery have never been adopted, due partly to the configuration of the land, partly to the conservatism of the Spanish farmer, and partly to the abundance of cheap labour.

Livestock also makes a substantial contribution to Spain's economy. The principal livestock products include meat for home consumption, wool, hides, goat and sheep skins (of which there is a considerable export surplus) milk, cheese and butter.

The total 1946 fish catch is estimated to be about the same as in 1945, 510,000 tons. However, the sardine catch was only about 30 per cent as high as in the preceding year. Shortage of olive oil and tin plate continued to restrict canning operations.

Mining an Important Industry

Mining is one of the important industries, although in almost every branch it has declined appreciably during the last twenty or thirty years. The mining and metallurgical industries have made considerable progress in the adjustment to peacetime conditions. However, there are few indications that further expansion can be expected in 1947, except possibly in the production of potash, lead, zinc, fluorspar and mercury. Spain is the world's largest producer of mercury, which comes from the rich Almaden mines. Another metal of importance is aluminum, produced by Aluminio Espanol S.A., in the Province of Luesca. The annual prewar output was about 1,200 tons, but this was insufficient to meet the domestic demand.

Spain was rather late, compared with other Western European countries, in developing her manufacturing industries. The industrial revolution really began in the 1920's and was furthered by the protectionist policies of the early 1930's. After the close of the Civil War, in 1939, the present government adopted a variety of administrative controls favouring domestic industry.

In the important textile industry, operations were normal during the first two quarters of 1946, but dropped sharply during the last half of the year.

Spain has not been regarded as one of the major producers of chemicals, although it has been a prominent supplier of potash fertilizer, superphosphates and tartaric acid.

In addition to the foregoing, the manufacture of cigarettes, earthenware, glassware and bricks, flour, and sugar is of considerable importance, and meets all, or nearly all, the local requirements.

The metric system is in force throughout Spain, but certain old weights and measures, such as the "libra", "arroba", etc., are used in domestic transactions.

Road Transport Developing

Road transport had been developing rapidly in the years preceding the Civil War. At the close of 1934 the total number of motor vehicles licenced and in use had risen to 180,158, of which 100,266 were private cars; 24,693 were taxis; 42,567 lorries or public service passenger vehicies; and 15,525 motorcycles. Since the Civil War, automotive transportation has been severely handicapped by shortages of vehicles, spare parts, tires and gasoline. Of the total road and highway mileage, at the end of 1939, 75 per cent was macadam, 20 per cent bituminous-coated macadam, 4 per cent penetration-asphalt macadam, and 1 per cent concrete and paving block.

During 1946 the Spanish Government devoted considerable attention to aviation, particularly in regard to international conventions and legislation. Iberia, the state-owned monopoly of scheduled air transport in Spain, inaugurated several important new services, both national and international. Iberia airlines carried 115,000 passengers in 1946 as compared with 59,400 in 1945, and 13,430 in 1943.

For many years before the Civil War, Spain's merchant fleet had remained between 1 and 1·2 million tons gross register; on the outbreak of that war in 1936, it consisted of 955 ships of 1,177,357 tons, of which about 400,000 tons were built in Spain. In 1946, the total tonnage of the Spanish merchant marine amounted to slightly more than one million tons, consisting of 10,066 vessels of over 100 gross registered tons.

Before the Civil War and, in fact, until 1942, the Spanish railway system was largely controlled by four main line companies which, between them, owned over 80 per cent of the total trackage, and handled an even greater percentage of the total traffic. During recent years, the extreme shortage of ties, new rails, signalling equipment, and coal has prevented any substantial improvement in rail transportation.

The Spanish import tariff is highly protective of Spanish industry. Duties are usually specific and payable in gold pesetas. By a law of December 31, 1946, customs duties on more than 80 per cent of the items listed in the Spanish customs tariff were increased by 20 per cent. In 1946 the system of temporary imports was extended, so that tin plate, wood, steel, fibres, and certain other items may now be imported duty free, manufactured into containers and other items, and re-exported.

Bank of Spain a Private Enterprise

Under a new banking law, signed December 31, 1946, the Bank of Spain continues to be privately owned and, while it retains its position as the Government's official financial agent and depository, its exclusive privileges of issue and its power to act as a banker's bank for discount and other operations, it is also empowered to carry on private banking operations. During 1946, currency in circulation rose more rapidly than in any other year since the Civil War. At the end of 1946, the total value amounted to 22·8 billion pesetas as compared with 18·9 billion in 1945 and 4·8 billion in 1935. According to a report of the Central Committee of Spanish Banks, published on June 30, 1946, deposits rose from 27·4 billion pesetas in June, 1945, to 32·8 billion in June, 1946.

The basic currency in circulation is the paper peseta. Customs duties are collected in gold pesetas, a theoretical unit arrived at by adding a surcharge of 2·577 times the regular peseta amount due. At present official exchange rates, one Canadian dollar is equivalent to 10·95 pesetas.

Trade Balance Now Favourable

Spain's foreign commerce is rather small, in both volume and per capita ratio, as compared with the more important trading nations of Europe and is characterized by a normally adverse balance of trade. This unfavourable balance was reversed during World War II as a result of competitive buying by the belligerents at abnormal prices. Spain was thus able to pay for a large share of her imports, to build up substantial gold and foreign exchange reserves and to maintain a high rate of exchange. The values of Spain's imports and exports, and her trade balances, are shown in the following table based on Spanish official statistics, which have been converted to sterling at the average rate prevailing each year:

	1934	1935	1942	1943	1944
			Values in £000's		
Exports	39,317	39,007	55,722	76,913	77,788
Imports	54,882	58,101	53,854	80,017	67,206
Balances	−15,565	−19,094	+ 1,868	− 3,104	+10,582

The principal groups of commodities exported are, in approximate order of importance: (1) foodstuffs and drinks; (2) minerals and their produce; (3) livestock, leather and other products; (4) metals and their products; (5) chemicals and their products; (6) timber and other wood products used in industry.

The principal groups of commodities imported are: (1) minerals and their produce; (2) cotton and manufactures; (3) machinery, apparatus and vehicles; (4) foodstuffs and drinks; (5) chemicals and their products; (6) timber and other vegetable wood products used in industry.

Trade with Canada Summarized

Quantities and values of the principal commodities exported to and imported from Spain by Canada in 1946 are shown in the following tables:

Principal Canadian Exports to Spain in 1946

		Quantity	Value
Total		....	$ 695,045
Aluminum bars, ingots, blooms	Cwt.	27,244	373,601
Rubber, crude	Lb.	1,279,018	236,620
Soda and sodium compounds	Cwt.	6,612	25,947
Machinery and parts, n.o.p.		....	20,100
Medicinal preparations		....	8,125
Asbestos milled fibres	Ton	40	7,744
Aircraft and parts		....	6,174
Mink skins, undressed	No.	140	4,900
Flour of wheat	Bbl.	522	3,889
Settlers' effects		....	2,000

Principal Canadian Imports from Spain in 1946

		Quantity	Value
Total		....	$4,484,445
Olives, sulphured or in brine	Lb.	4,321,809	1,388,524
Wines, non-sparkling	Gal.	177,726	838,778
Cork, slabs, boards, for manufactures		....	833,356
Almonds, shelled	Lb.	854,991	485,105
Other nuts, shelled	Lb.	418,389	235,025
Almonds, not shelled	Lb.	834,183	191,260
Ginger and spices, ground	Lb.	175,572	68,305
Precious stones, not mounted		....	58,749
Corks over ¾"	Lb.	62,300	45,028
Olive oil, n.o.p., edible	Cwt.	388	43,904
Brandy	Pr. gal.	3,471	37,337
Filberts, hazel, not shelled	Lb.	130,833	33,926
Articles for use in fisheries		....	31,633
Tartaric acid, crystal or powder	Lb.	54,187	30,251

Oil Industry in Mexico is Now Important Factor in Economy

Increased exports of oil necessary to uphold Mexican currency—Contract signed by government monopoly for 100 new wells—Mining industry continues to complain of high taxes, poor transportation facilities and increased production costs—Silver mining will benefit from new coinage.

By D. S. Cole, Commercial Counsellor, Canadian Embassy

(Editor's Note—This is the second of four articles on a survey of Mexican economic conditions during the second quarter of 1947. The first appeared in the December 6th issue of *Foreign Trade.*)

MEXICO CITY, December 4, 1947.—The situation of the Mexican oil industry, in which foreign holdings were expropriated in 1938, has become one of the most important factors in Mexican economy this year. The extent to which Mexico must rely on oil for domestic use and for export was illustrated by a statement which was made by President Alemán during June. Exports of oil had to be increased, he said, and he added that Mexican currency was being upheld only by oil. During July and August, Mexico announced that a settlement had been made with British interests represented by the Eagle Oil Company ("El Aguila") and also confirmed that a contract had been signed between Petroleos Mexicanos (Pemex), the government monopoly, and an independent American driller, for the drilling of 100 new wells in various parts of the country.

The new government has made a determined effort to place the languishing oil industry on a more efficient basis and to overcome financial losses which have characterized the operations of Pemex to an increasing extent in recent years. In June, the Pemex administration and the National Oil Workers Union signed a new collective agreement which became effective immediately and will result in a saving by Pemex of between 10 million and 18 million dollars annually in expenses. The agreement appeared to be a logical continuation of government policy by which a few months ago a lightning strike called by the National Oil Workers Union was defeated through the use of federal troops on oil field installations, service stations and delivery trucks throughout the country.

Under the terms of the June pact, Pemex became free to contract for any kind of work that may be required by the industry, without union intervention. Pemex also established the right to move personnel and equipment to any part of the country in accordance with the needs of day to day operations, and to refuse to fill positions which may become vacant at any time in the future.

Payment Agreements Reached for Expropriated British and Dutch Companies

Mexico agreed to pay the group of expropriated British and Dutch companies headed by "El Aguila" Oil Company the sum of U.S.$81.250,000, plus interest at the rate of 3 per cent annually, computed from March 28 to September 18, 1948. The fifteen annual instalments by which payment will be completed therefor will amount to U.S.$8,689,275.85 each year, subject to no deductions of any kind. The initial payment was made on September 18, 1947. At the same time, it was revealed that only $4,085.000 are pending on settlement of all claims made by expropriated United States oil properties. A further indication of the poor

Mexico—Oil refinery at Tampico.

conditions under which the nation's oil reserves have been exploited, and the determination of the present government to place the industry on a paying basis, was the appointment of a mixed Commission for the reorganization of the petroleum industry. This Commission has submitted to the government extensive plans for expanding and reorganizing the industry at an estimated initial cost of $340 million. This expenditure would provide for the drilling of any wells, construction of refineries, laying of pipelines, and the establishment of a storage system.

Production of Crude Oil Increasing

Mexican production of crude oil, which totalled 38·5 million barrels in 1938, reached 46·7 million barrels last year and production of 13,048,193 barrels during the first quarter of this year indicated that the goal of 56 million barrels for the whole year may possibly be realized.

Exports during the first quarter of this year were 2,511.390 barrels as compared with 2 257,705 barrels during the corresponding period of 1946.

Thus production has increased about 17 per cent this year and exports are 11 per cent greater in volume. During the current year, 15·5 million barrels are expected to be processed in Pemex refineries, as compared with 42,300,000 barrels which were processed during 1946. Domestic sales this year are estimated at 36·8 million barrels as against 32·5 million barrels in 1946.

Large Volume of Petroleum Products Still Imported

However, the state of the industry is not as healthy as these figures would perhaps suggest. For instance, during 1946, Mexico exported 9·4 million barrels of petroleum and at the same time imported petroleum products amounting to about 3,380,000 barrels of refined products plus 71.800,000 million pounds of liquid gas and 13,000,000,000 cubic feet of natural gas. The value of these imports was $15,270,000, nearly $2,000,000 in excess of the value of Mexican exports. The explanation, which itself is indicative of the under-developed condition of the industry, is that Mexico cannot yet produce and supply the domestic market with liquid and natural gas or with such refined products as high-octane gasoline. Transportation costs also are connected with this condition, since a barrel of petroleum products can be brought across the border or shipped by tanker from California to Mexico's west coast far more rapidly and at less cost than from Mexican oil fields in the gulf area.

New Wells Necessary to Meet Domestic Demand

In support of the now popular view that large amounts of fresh capital must be invested in Mexican oil is the fact that by 1950 the country will not be able to draw enough oil from its subsoil to meet even its domestic needs, unless new wells are financed and put into production without loss of time. Mexican production has for too long been dependent almost entirely on the fabulous Poza Rica well, which was first put into operation by Shell interests after some $20 million had been spent on exploration. At the beginning of September, Pemex signed a contract with an independent United States company for the drilling of 100 new wells. The terms of this contract are that in regard to any well which is not productive, Pemex will pay the cost of drilling over a period of ten years, plus 6 per cent interest on unpaid balances. So far as productive wells are concerned. Pemex will pay the cost of drilling, plus 10 per cent, and the United States operator will receive 35 per cent of the oil produced and have the right to buy a further 15 per cent. From the moment at which payment is completed for each well drilled, the wells will become the property of the Mexican nation.

Mining Industry Complains of High Taxes

The mining industry has continued to complain of high taxes, lack of transportation facilities and increased production costs, and it is undoubtedly still feeling the effects of the cancellation of wartime contracts. However, during the period May to August, this year, there have been indications that stock piling is increasing the demand abroad. If overall production this year exceeds that of 1946, it will be caused partly by the fact that there was a long series of strikes during the first half of last year. Also, accumulated stocks of low-grade ores, which in some cases were not shipped previously because of lack of transportation, now are being exported to take advantage of an expected rise in prices.

The National Bank of Mexico in August drew attention to the costs of taxation to the industry. The bank listed taxes of 19·9 per cent of the value of gold mined, 16·9 per cent of copper, 20·2 per cent of lead, and 14·3 per cent of zinc. The bank also observed that national production of some metals has in fact decreased over a long period of years. For instance, silver production stood at 85 million ounces in 1937 and again reached that level only in 1942, since when it has diminished consistently to the level of 46 million ounces in 1946. Production of gold, which is fetching U.S.$35 per ounce officially, is not expected to exceed this year one-half of the total for 1937.

The issuance of one-peso and five-peso coins in September, this year, will have some beneficial effect on silver mining. The one-peso coins contain seven grams of pure silver, with seven grams of copper, zinc and nickel. The five-peso pieces, which weigh thirty grams, contain 27 grams of pure silver, and are composed of 90 per cent silver and 10 per cent copper. Exports of silver have declined considerably. In

1942, 18 per cent of the silver mined was exported, to the value of $133,560,000 approximately. Last year, only 9 per cent of national production was exported, although values had risen to $279,380,000.

The price of lead reached U.S.$0.23 at the end of July and that of copper, U.S.$0.22. Up to the end of July, 55,000 tons of copper were exported at an average rate of U.S.$0.2325 per pound. The sale of lead decreased by 75,000 tons, compensating for higher prices. Zinc exports were expected to remain at their past level of about 140,000 tons annually.

The important silver mining industry is at present in a state of armed truce so far as labour is concerned. When silver prices moved upwards from U.S.$0.71 to U.S.$0.91 during 1946, the miners and the industry, with the intervention of the government, signed an agreement which provided for increased wages on a sliding scale, proportionate to the market price of the metal. When silver fell to U.S.$0.60, labour demanded that wages be maintained on the basis of the U.S.$0.91 price. The miners finally agreed to accept the sliding scale rates, but there is a feeling that the armistice may not last for very long.

There is some indication that the government will attempt to increase national production, as there is a firmer attitude towards the enforcement of existing laws which require that some work be done each year on all registered mining claims. If enforced, this law obviously prevents the holding of large numbers of undeveloped claims.

United Kingdom Imports from Canada in July to September Highest on Record

Valued at £66,000,000 out of total of £518,600,000—Exports valued at £302,600,000—North American continent accounted for eight per cent of Britain's exports and twenty-eight per cent of her imports—Total trade increased over previous quarter.

By A. E. Bryan, Commercial Counsellor for Canada

(One pound equals $4.0300)

LONDON, November 27, 1947.—Approximately eight per cent of Britain's exports during the third quarter of 1947 were directed to North America, including Canada, and 28 per cent of her imports were obtained from this continent. The largest proportion of her exports went to France and Northern Europe, amounting to nearly 25 per cent, which was the source of supply for 18·6 per cent of the goods imported by the United Kingdom.

Exports to all areas in the third quarter were valued at £302,600,000, which is an increase of £37,300,000 over those for the previous quarter. The largest individual market for British goods was British India, followed by the Union of South Africa, Australia, Eire, the United States, New Zealand and Canada, in that order.

Imports during the period under review were valued at £518,600,000, which represents an increase of £63,100,000 over those for the previous three months. Although there was an increase in value, imports from North America represented a smaller percentage of the whole. Imports from Canada, valued at £66,000,000, were the highest on record. The United States was the principal source of supply, with a value of £77,700,000, while Argentina was in third place, with a value of £40,900,000.

British Exports, by Areas

Area	Year 1938	Year 1946	Second Quarter 1947	Third Quarter 1947
	Percentage of total value			
France and Northern Europe	29.75	30.51	27.26	24.77
Rest of Europe	6.84	7.59	7.82	7.53
Africa	15.64	17.67	17.85	16.39
India and Western Asia	10.23	14.78	13.87	15.10
Rest of Asia	6.36	5.27	7.25	8.93
Oceania	12.35	9.08	9.06	10.28
North America	9.34	7.56	8.11	7.91
Central America and West Indies....	2.23	1.94	1.93	1.78
South America	7.26	5.60	6.85	7.31
Total, British countries	49.86	49.30	51.74	53.50
Total, foreign countries	50.14	50.70	48.26	46.50
Total, all countries	100.00	100.00	100.00	100.00

British Imports, by Areas

Area	Year 1938	Year 1946	Second Quarter 1947	Third Quarter 1947
	Percentage of total value			
France and Northern Europe	28.52	13.90	13.92	18.59
Rest of Europe	5.00	4.08	5.06	4.45
Africa	6.89	9.81	11.33	8.32
India and Western Asia	8.63	10.05	6.38	7.84
Rest of Asia	4.80	2.43	3.65	2.26
Oceania	13.13	11.02	9.79	11.42
North America	21.68	32.93	31.61	28.21
Central America and West Indies...	3.78	5.87	6.90	7.46
South America	7.57	9.91	11.36	11.45
Total, British countries	40.41	48.76	45.14	43.66
Total, foreign countries	59.59	51.24	54.86	56.34
Total, all countries	100.00	100.00	100.00	100.00

More Materials Recommended for Light Clothing Industry of Great Britain

Working Party of Board of Trade also propose establishment of Joint Development Council to collect and disseminate detail market information—Abandonment of cost-plus element in price control suggested.

By C. G. Venus, Office of the Commercial Counsellor for Canada

LONDON, December 2, 1947.—Materials should be made more freely available for the manufacture of clothing for export within the limits of national planning and trade, according to the recommendations made by the Board of Trade Working Party's report on the light clothing industry. The Joint Development Council which it is proposed should be established should collect and disseminate detailed market information. It is suggested that imported clothing should be subjected to the same standards as apply to home production. The report covers mainly such items as women's dresses, blouses, neckwear, underwear, nightwear, dressing gowns and overalls, as well as infants' wear and certain types of boys' and men's underwear.

The products of the industry since 1941 have been subject to the rationing system. One effect of the rationing scheme is the reduction in the number of articles which can be produced with the same labour force, owing to the high "labour content" in the clothing now being made as compared with the pre-rationing period. This change is due in part to the insistence by the public upon obtaining the best value for their coupons. It has meant in practice, for example, the purchase of one good durable garment instead of two or even more cheaper ones made with the minimum labour costs. At the same time, according to the Working Party, the present state of the industry is characterized by a serious and persistent shortage of materials.

Establishment of Development Council Favoured

The Working Party favour the establishment of a Development Council for the industry. They consider it is essential that the light clothing industry should, in future, be able to base its activities on overall planning. This would cover the supply of sufficient and suitable materials to ensure abundance of light clothing to meet the public demand and to promote arrangements for co-ordinating production and marketing, whilst preserving the individuality of the producers and promoting their efficiency. Without such planning it is feared the present period of shortages might be succeeded by a period of over-production.

One result of the utility price control system, the report states, is that where the ceiling price is high the manufacturer who can make goods at a much lower figure is encouraged to be careless about costs. The remedy suggested for this is the abandonment of the cost-plus element of control and the substitution of a system of standard prices under which any manufacturer selling at or below the standard price would not be subject to any limitation to his profits.

The present condition of the light clothing industry in respect of export trade can be illustrated by the following provisional figures of the quantities and values of the products of the industry which were exported in the year 1946:

United Kingdom Exports of Light Clothing, 1946

Kind of Garments	Quantity	Value
Women's, Girls' and Infants' Clothing—		
Dresses and Skirts		
Cotton	174,675	£ 109,064
Silk or artificial silk	108,246	313,401
Wool	387,905	581,910
Other	51,277	57,615
Blouses, Jumpers and the like		
Silk or artificial silk	60,733	70,370
Other	206,164	106,710
Other descriptions, including infants' outer garments and dressing gowns, but excluding coats and costumes	....	1,132,506
Aprons, overalls, etc.	1,580,703	630,680
Undergarments		
Other undergarments (not hosiery, shirts, collars, cuffs, or pyjamas and nightwear)	248,051	524,769

These figures, the report points out, relate to an abnormal year during which exports included a proportion of government surplus goods and of goods exported for relief purposes. In addition there was a sellers' market in export trade.

While the Working Party find it difficult to assess the normal volume of export trade in the various products, they hold the view that other countries will tend to produce at home most of the ordinary types of clothing they require and limit imports to specialized products which they cannot make for themselves.

German Industrial Production Declines as Prolonged Drought Reduces Hydropower

Electricity generated last September in United States Zone only half of that in corresponding month of 1946—Despite increase of power from coal, severe restrictions imposed on consumers in all categories—Summer holidays and absenteeism contributed to drop in production.

By D. W. Jackson, Canadian Economic Representative

MINDEN, November 29, 1947.—Industrial production in the U.S. zone of Germany fell off more than five per cent in September, 1947, from the figures reached in May, June, and July of this year, as the longest drought in 30 years made its full effects felt. The index of the volume of industrial production in September was 48 as against an August level of 51 based on 1936 average equal to 100.

Generation of electricity by water power in September hit the lowest point since the occupation. At 157 million kilowatt hours, it was 37 per cent lower than August and 50 per cent below September of last year. Net receipts from the British Zone also fell 31 million kwh. below August as a result of the lack of rainfall.

Although coal was used to generate 199 million kwh. which was 54 million more than in the previous month, the total supply of current was down by 60 million kwh. Consumption had to be reduced correspondingly by means of severe restrictions on consumers in all categories, especially industrial. Switch-offs of entire areas had to be imposed in most localities. Consumption dropped from 505 million kwh. in August to 436 million in September, a decline of 14 per cent in a month in which seasonal factors such as shorter daylight hours normally cause an increase.

The fact that the summer holidays, with their attendant shutdowns, were past, tended to sustain the level of production during September.. On the other hand, some industries experienced additional absenteeism as workers went to the fields to join in harvesting the crops, and continued scarcity of coal and transport added to the depressing influence of the water and electricity famine.

Ruhr Hard Coal Production Highest Since Occupation

Nevertheless, hard coal production in the Ruhr reached almost 241,000 tons daily average for the month of September, 1·5 per cent above August and the highest since the occupation began. Stocks of coal at the mines remained virtually constant during the month, at less than one week's production, indicating successful efforts to concentrate railroad transport on the task of moving the coal, a problem complicated by the virtual tie-up of river traffic which was a concomitant effect of the long dry spell.

Declines were registered in six important industrial groups in September. The largest of these industries, chemicals, was down 26 per cent from the August level; vehicles, 22 per cent; stone and earths, 11 per cent; saw mills, 10 per cent; electricity and gas, 6 per cent, and machinery, 5 per cent. Another five groups remained steady or only slightly changed: ceramics, textiles, optics, electrical products, and paper and pulp. Production in five industries rose, iron and steel, glass, mining, and leather gaining from three to six per cent each, and the rubber industry rising 30 per cent, against the general downward trend.

Serious Production Decline in Chemicals Group

The most serious production drop occurred in the important chemicals group, where electric power plays a dominant role. Production of calcium carbide, the largest single item, dropped from 14,000 tons in August to 7,500 tons, or little more than half, in September, owing entirely to its dependence on hydro-electric power. · Cyanamid production, which is dependent upon the supply of calcium carbide, fell even more severely, from 15,000 tons to less than 3,300 tons. The shortage of waterpower and coal also curtailed production of caustic soda and soap. Paints, varnishes, and lacquers fell off by almost 12 per cent because of the critical shortage of drying oil, which must be imported. On the other hand, production of dyestuffs and sulphuric acid rose moderately, though not enough to balance the declines. Taken as a whole, chemical production fell from 52 to 37 per cent of its 1936 level. An increase of one-fourth in the bizonal allocation of coal to the chemical industry is expected to help the industry recover in October.

The vehicle industry produced in September only 17 per cent of its 1936 average monthly output, against 22 per cent in August. Gains in the small numbers of passenger cars and motorcycles being produced were far outweighed by a decline of more than one-quarter in the production of trucks, both light and heavy, in which productive effort is being concentrated. Again, the lack of electric power was the cause.

General Production Recession in Building Materials

Reduced coal allocations for production of cement and bricks, major building materials, brought the stones and earths index down from 42 to 37. The shortage of waterpower also took its toll in the lumber industry. A fall in lumber production from 356,000 cubic metres in August to 320,000 in September, plus a slight decrease in plywood output, reduced the saw mills and woodworking index from 103 per cent of the peacetime 1936 level to 93 per cent. Glass production, on the other hand, rose from 101 to 105 per cent of its 1936 level, escaping the general recession in building materials by virtue of its utilizing chiefly brown instead of hard coal.

Despite a virtually unchanged level of gas manufacture, a ten per cent decline in generation of electric power brought the electricity and gas group index down from 93 to 87.

The important machinery industry fell from 45 to 43 per cent of its prewar level as power cuts reduced the output of anti-friction bearings to the lowest level since last February. Although the repair of railroad rolling stock in September exceeded the established target, it fell off in comparison with August. These items dominated the picture despite spotty increases as well as decreases in construction machinery, farm machinery, etc.

Output of Rolled Steel Products Increased

Rolling mill operations paced the iron and steel industry in September, the output of rolled steel products rising 9 per cent over August to almost 18,000 tons in September, an occupation record. The rise reflected better operational efficiency of the plants and the end of summer holiday shutdowns. Pig-iron production also set an all-time high for the postwar period, rising seven per cent to 28,500 tons. Further increases are anticipated with the scheduled reactivation of two furnaces in October. Foundry output of iron castings and a nominal amount of steel castings remained at the August level, but ingot steel output declined slightly, due mainly to a shutdown for relining an open-hearth furnace in Hesse. The overall iron and steel index rose from 57 to 59 (as compared with the 1936 monthly average of 100).

Progress was also made in September by the mining industry, which pushed its output up to 97 per cent of prewar, from an August level of 92 per cent. More pech and brown coal was dug, and the potash output also rose. Only iron ore lost ground, falling to 83,000 tons from August's record of 97,000, due to a two-thirds shutdown of the mines in Wuerttemberg-Baden.

Spectacular Production Gain Occurred in Rubber Industry

The only spectacular gain in September production occurred in the rubber industry. Almost 34,600 automobile and truck tires were turned out in September as against less than 25,700 in August. Production here has been erratic not so much because of general power, coal and transport conditions but because of the highly irregular receipts of imported rubber, which cause sporadic spurts and intermittent shutdowns in the larger plants.

The paper industry suffered slightly, production falling from 37 to 36 per cent of the prewar level in September as a result of short supplies of coal, raw materials and electric power, although an additional allocation of coal for October is expected to improve the situation. The ceramics and camera industries, which, like textiles, devote considerable production to export items, remained stable. The electrical products industry, producing both industrial and consumer goods, also remained on an even keel, output of industrial items being steady. A 70 per cent gain in the output of light bulbs, which more than recovered from its August slump, offset declines in radio and radio tube production. A gain of six per cent in the output of shoes brought the leather index up from 29 in August to 31 in September.

Cuba Offers Limited Market for Good Quality Imported Shoes

Although a large producer of footwear and selling substantial quantities to export markets, country imports better-quality shoes from United States available in wide range of widths not found in domestic product.

By J. E. O'Neill, Office of the Commercial Secretary, Canadian Legation

HAVANA, November 29, 1947.—Cuba is a large producer of footwear and is selling substantial quantities to export markets. None the less there is a small outlet for high-class imported shoes. According to the available statistics, domestic production during 1946 was approximately 9,000,000 pairs of men's, women's and children's leather shoes, 6,000,000 pairs of rope and rubber-soled canvas shoes and a small quantity of shoes of alligator leather, most of which were exported. There are about 350 registered factories producing all types of leather boots and shoes.

Cuban Exports of Leather Footwear

	1935-39 Average		1946	
	Pairs	Value	Pairs	Value
Total	6,590	$6,875	206,482	$1,081,706
Puerto Rico	....	....	118,743	599,785
United States	2,228	$3,533	34,863	225,011
Jamaica	....	....	20,724	116,848
Russia	....	....	14,483	43,449
Dutch West Indies	515	1,609	8,325	46,663

Comparing the above figures, it will be seen that Cuba's export trade was built up almost entirely during the war years, and it remains to be seen if Cuba will be able to hold its position in these markets once the United States industry is able to fill her domestic requirements more fully.

Although the United States, including Puerto Rico, is the principal buyer of Cuban boots and shoes, nearly 100 per cent of imports come from the United States. The following figures indicate imports by types of shoes. In each case, nearly all of the imports were supplied by the United States.

Cuban Imports of Footwear

	1935-39 Average		1946	
	Pairs	Value	Pairs	Value
Men's shoes with leather heels	30,851	$ 92,164	36,158	$181,092
Men's shoes with rubber heels	16,215	42,216	33,745	148,208
Women's shoes with leather heels	144,054	228,128	129,212	463,625
Women's shoes with rubber heels	29,826	45,517	21,622	50,248
Children's shoes with leather heels	16,355	18,088	21,154	38,974
Children's shoes with rubber heels	13,063	14,815	8,102	10,765
Riding and hunting boots	176	1,124	237	1,991

Although Canadian shoe manufacturers are at a disadvantage with those of the United States in view of the preferential tariff, it is not thought that this obstacle should prove insurmounable to those manufacturers desirous of entering this market. Landed costs, however, would have to be competitive with those of the United States, and it will be necessary to compete in range of sizes, styles and in quality with the products of that country.

Footwear from United States Enjoys Certain Prestige

United States footwear has a certain prestige which greatly facilitates its sale in spite of a large and progressive Cuban shoe industry. Most of the shoes imported from the United States are of the better quality and they are available in a wide range of widths as well as half-sizes. This range of width is not available in the domestic shoes and is an important factor favouring the sale of United States or any imported shoes. Although Canadian shoes are not known in Cuba, they would have some prestige from the fact that they are imported.

Although the retail price of Cuban shoes is high even for the lower-quality shoes, the mark-up in Cuba is also high. In general it would appear that the better-quality shoes will be of more interest to importers, since the imported shoe sells on quality, and there is a more than adequate supply of medium- and low-quality shoes available from the domestic industry.

Per Capita Consumption is High

The per capita consumption of footwear is high, as evidenced by the numerous well-stocked shoe shops throughout the city of Havana, some of which handle imported footwear exclusively. Two-tone shoes, both white and tan and white and black, are sold in large quantities, but for winter solid tan and to a lesser extent solid black are also sold exclusively. In respect to women's footwear there is also some importation of novelty styles, which are quickly copied by the Cuban industry. Cuba being a subtropical country, only light-weight footwear is used in this climate, both for winter and summer.

Imported shoes are sold through agents and distributors carrying full lines of samples, as it has been found that importers will not order against catalogues or other illustrated literature. Also some of the larger stores send their own buyers to the United States to make seasonal purchases.

Canadian Imports, by Commodities

Commodity	October			January-October		
	1938	1946	1947	1938	1946	1947
	(Thousands of Dollars)					
Agricultural, Vegetable Products—						
Fruits	1,925	7,356	7,466	17,405	76,910	66,638
Nuts	536	1,794	1,993	2,712	16,809	18,674
Vegetables	170	905	1,469	5,330	24,743	21,189
Grains and products	1,374	1,308	4,845	14,702	13,024	25,917
Sugar and products	2,447	4,037	8,269	17,177	33,741	46,518
Cocoa and chocolate	228	5	628	1,691	3,845	7,362
Coffee and chicory	301	979	1,770	3,308	15,184	10,999
Tea	1,018	364	2,741	8,051	7,533	16,307
Beverages, alcoholic	709	1,218	1,670	4,997	9,890	10,132
Gums and resins	152	503	506	1,173	4,364	5,251
Oils, vegetable	1,045	829	5,302	10,338	8,924	22,567
Rubber and products	1,307	4,587	2,021	9,012	17,183	24,127
Tobacco	210	318	300	1,839	2,706	2,606
Vegetable products, other	745	1,985	2,314	6,341	12,571	14,402
Total	12,166	26,188	41,294	104,076	247,427	292,690
Animals and Animal Products—						
Fish and fishery products	265	387	558	2,075	3,794	4,152
Furs and products	292	1,957	2,789	5,057	23,165	17,581
Hides and skins, raw	402	167	797	2,123	2,122	10,254
Leather, unmanufactured	247	314	579	2,142	3,220	5,513
Leather, manufactured	221	504	814	2,124	3,917	6,297
Animal oils, fats, greases	134	1,087	1,337	749	4,192	13,014
Animals and products, other	560	1,187	1,501	6,977	11,207	17,258
Total	2,122	5,603	8,375	21,248	51,617	74,068
Fibres, Textiles and Products—						
Cotton, raw and linters	1,638	2,889	5,684	10,246	33,387	48,200
Cotton products	1,501	7,266	8,619	14,018	54,054	106,606
Flax, hemp, jute and products	893	1,412	4,077	7,109	19,014	30,927
Silk and products	657	448	530	5,667	2,764	6,493
Wool, raw and unmanufactured	1,219	3,546	2,066	8,454	23,505	25,335
Wool products	1,300	3,492	5,177	13,546	27,932	45,138
Artificial silk and products	405	1,946	2,618	3,093	16,942	29,832
Textile products, other	933	3,224	3,842	11,853	24,170	38,089
Total	8,547	24,223	32,613	73,986	201,768	330,620
Wood, Wood Products and Paper—						
Wood, unmanufactured	353	924	1,358	4,389	6,861	15,155
Wood, manufactured	381	1,122	1,497	3,589	8,945	15,183
Paper	711	1,836	2,278	6,276	15,440	19,511
Books and printed matter	1,517	2,625	3,215	12,551	25,069	26,667
Total	2,962	6,507	8,348	26,804	56,315	76,517
Iron and Its Products—						
Iron ore	361	1,467	1,764	2,469	4,565	11,285
Scrap	78	251	270	565	1,725	2,899
Castings and forgings	279	796	648	2,254	5,698	7,349
Rolling mill products	2,274	5,588	7,278	20,519	42,810	63,841
Pipes, tubes and fittings	147	784	1,617	1,685	6,882	10,958
Wire and chain	125	545	961	1,691	4,266	7,884
Farm implements and machinery	651	6,495	9,198	19,084	54,261	89,106
Hardware and cutlery	203	837	967	1,807	5,802	8,665
Household machinery	241	690	2,071	2,272	4,739	13,013
Mining, metallurgical machinery	446	474	1,437	4,632	5,460	10,548
Business, printing machinery	475	1,552	2,086	5,000	10,032	17,589
Other non-farm machinery	1,657	9,949	14,470	20,128	84,207	129,948
Tools	172	991	891	1,909	8,324	9,820
Autos, freight and passenger	809	4,946	6,938	10,453	23,396	62,166
Automobile parts	2,214	5,965	9,830	18,981	53,903	81,070
Other vehicles, chiefly iron	495	1,082	2,406	2,291	7,574	13,690
Engines and boilers	397	2,567	4,224	6,899	23,451	34,873
Cooking and heating apparatus	230	1,059	1,308	1,360	8,130	11,759
Iron products, other	1,324	4,177	5,656	13,541	35,250	51,558
Total	12,579	50,215	74;020	137,540	390,475	638,019

Canadian Imports, by Commodities—Concluded

Commodity	October 1938	October 1946	October 1947	January-October 1938	January-October 1946	January-October 1947
	(Thousands of Dollars)					
Non-Ferrous Metals and Products—						
Aluminum and products	562	2,179	1,893	4,326	11,172	14,060
Brass, copper, and products	262	1,025	1,087	2,643	7,247	11,452
Tin	154	1,655	46	1,881	5,992	5,579
Precious metals (except gold)	335	1,931	1,343	2,416	11,027	11,039
Clocks and watches	295	726	1,006	1,873	6,197	7,404
Electrical apparatus, n.o.p	1,145	4,523	6,498	10,961	38,147	57,752
Non-ferrous products, other	741	1,877	3,763	8,727	16,611	28,403
Total	3,493	13,916	15,637	32,825	96,393	135,689
Non-Metallic Minerals, Products—						
Clay and products	557	1,601	2,260	6,515	14,365	19,861
Coal	3,665	15,393	15,344	29,246	97,719	113,388
Coal products	285	1,207	1,511	2,604	10,873	11,605
Glass and glassware	697	2,480	2,487	5,415	18,449	24,523
Petroleum, crude	4,281	10,097	12,762	35,628	72,466	104,519
Petroleum products, n.o.p	1,300	3,495	10,478	12,415	27,353	64,953
Stone and products	702	1,572	2,015	5,815	11,624	15,657
Non-metallic products, other	693	2,060	2,427	4,687	17,193	16,787
Total	12,180	37,905	49,284	102,325	270,042	371,295
Chemicals and Allied Products—						
Acids	236	355	327	1,404	2,703	2,978
Cellulose products	169	482	465	1,439	5,378	4,631
Drugs and medicines	290	747	862	2,949	7,909	10,202
Dyeing and tanning materials	607	686	993	3,314	7,726	8,771
Fertlizers	944	362	650	2,715	3,634	5,349
Paints and varnishes	457	679	1,344	3,057	7,740	11,227
Inorganic chemicals, n.o.p	886	1,286	1,255	6,671	10,556	11,416
Synthetic resins and products	130	1,346	1,151	754	11,504	13,931
Chemical products, other	651	2,081	2,892	6,499	19,178	26,316
Total	4,370	8,024	9,940	28,802	76,328	94,821
Miscellaneous Commodities—						
Films	80	129	273	1,133	2,025	2,392
Toys and sporting goods	329	709	768	2,034	3,620	6,494
Refrigerators and parts	17	588	1,412	1,068	4,197	10,406
Musical instruments	111	510	636	1,014	2,545	4,141
Scientific equipment	371	1,262	1,520	3,654	10,909	13,995
Aircraft and parts	246	1,060	763	2,774	8,031	10,877
Works of art	1,043	94	116	1,945	1,423	1,433
Canadian tourists' purchases	1,111	1,354	2,304	7,291	7,285	14,252
Parcels of small value	367	2,260	1,007	3,655	9,809	20,793
Wax, mineral and vegetable	50	222	133	354	2,766	2,321
Miscellaneous consumer goods	550	1,586	1,471	4,344	11,622	11,790
Miscellaneous, other	649	1,912	2,044	7,960	14,129	19,287
Canadian goods returned	178	480	586	1,860	67,097	6,158
Non-commercial articles	389	1,645	1,917	3,171	11,378	12,638
Total	5,491	13,812	14,952	42,256	156,838	136,976

DIRECTORY INFORMATION

The Foreign Trade Service head office directory, as well as the directory of Foreign Commercial Representatives in Canada appears in the last issue of *Foreign Trade* each month.

Belgians Form Economic Association

Brussels, November 29, 1947.—(FTS)—Leading businessmen in Belgium have created the "Association Economique Belgo-Canada" (Belgo-Canadian Economic Association), the purpose of which is to develop closer relations between Belgium and Canada. A number of representatives from industrial, financial, commercial, shipping and other trade organizations have joined this association.

U.K. Shortage of Railway Wagons Slows Up Transport of Coal

Rate of deterioration outstripping repairs and replacements—Increased coal production accentuates the situation—New bunkering arrangements contribute to easing the dollar problem.

By A. E. Bryan, Commercial Counsellor for Canada

LONDON, December 3, 1947.—Nearly 20,000 railway wagons are being repaired or awaiting repair in the United Kingdom, according to a statement issued by the Minister of Economic Affairs, who intimated that the rate of deterioration of existing wagons was outstripping repairs and replacements. There are more than 54,000 fewer wagons in use today than at this time last year, and over 80,000 fewer than in 1945. Approximately 2,560 new wagons are being placed in service per month, and it is hoped to raise this figure to 4,000 next year.

It is estimated that there will be at least 1,000,000 tons more coal and 4,000,000 tons more iron and steel to be transported by rail this winter than last. Even allowing for acceleration of the rate of repair, there will be a shortage of 100,000 wagons.

The critical situation is interfering seriously with the transport and distribution of coal and any immobilization of wagon stock, if continued, might hinder the production drive during the winter. In the circumstances, the Minister called for drastic steps to reduce the time needed to get wagons discharged.

Production of Coal Shows Improvement

The Minister of Fuel and Power states that stocks of coal on November 1 were over 16,250,000 tons. Distributed stocks stood at 5,500,000 tons more than last year, but undistributed stocks were down by 500,000 tons. There was added to stock this summer 10,300,000 tons as compared with 4,000,000 tons in 1946, the difference being due to a reduction in exports and bunkers, lower internal consumption and increased supplies, of which 600,000 tons represent imports.

Output per man-shift (overall), which was 1·05 tons at the end of August, reached 1·14 tons at the end of the summer, the highest output per man-shift since April, 1940. Output per man-shift at the coal face, which was 2·96 tons in the last week of summer, exceeded the prewar level of 2·91 tons in October, 1939.

Effort Made to Ease Dollar Situation

Two steps have been taken which will make a small contribution to ease the United Kingdom's dollar problem. Ships on the South American run are to be supplied with sufficient coal to take them to South America and back to St. Vincent instead of sufficient to take them to St. Vincent on the outward voyage only. Secondly, the National Coal Board has been given discretion to provide bunker coal from certain coal-fields to ships performing useful services to the United Kingdom, and also to provide cargoes of coal to certain British-owned bunker depots abroad. The total amount of coal thus provided might represent a weekly saving of nearly $500,000.

Import Permits Required on All Shipments of Goods to Bolivia

Canadian trade with Bolivia averages approximately U.S. $53,000 monthly—Development of Bolivian import control outlined for the benefit of exporters to this market.

By E. H. Maguire, Assistant Commercial Secretary, Canadian Embassy

SANTIAGO, November 29, 1947.—Canada's trade with Bolivia has never been very large, the total exchange of goods between the two countries averaging approximately U.S.$53,000 monthly for the first seven months of this year. On July 15, 1945, the Bolivian Government decreed that all imports shipped into Bolivia after this date would require authorization consisting of an import permit granted by an "Imports Committee", set up in La Paz and composed of: a representative of the Ministry of Finance; the General Manager or a representative of the Central Bank of Bolivia; and a representative of the Ministry of National Economy.

The decree stipulated that "the Bolivian Consuls shall not legalize any imports, nor shall the Customs Houses permit despatch, without the presentation of the import permit by the interested party". The decree also stipulated that all import licences would carry the authorization to a bank for the delivery of the necessary foreign exchange and stated that "the import licence implies the obligation of the government to grant the amount of the foreign exchange necessary to pay for the shipping expenses and all other expenses required for the importation of the merchandise stated on the licence". The decree made no provision as to the period for which import licences would normally remain valid. Although the preamble to the decree referred to "the present state of emergency", the main provisions of this decree still remain unaltered.

Import Permit Control Tightened as Foreign Exchange Reserves Lowered

On the whole the proceedings of the Imports Committee seem to have been reasonable and sensible, both in regard to the firms to whom import permits have been issued and in regard to the commodities for which they have been issued. Nevertheless, the operations of the Committee were conducted without strict reference to the amounts of foreign exchange available at any time. In a resolution dated May 23, 1947, the Committee itself admitted "that the enormous difference between the amount of the authorized permits granted up to the end of 1946 and the amount of foreign exchange available in the banks to meet this amount has caused and continues to cause serious upsets in the balance of payments of the country" and a statement was issued tightening up in various respects the procedure for the issue of import permits. The most important resolutions contained in this statement were:

1. That import permits should in future be issued in strict accordance with a monthly quota of foreign exchange fixed by the Ministry of Finance.

2. That all import permits should become automatically invalid 180 days after the day of issue, unless they were revalidated as the result of a new petition to the Imports Committee.

3. That the imports of the previous six months would be taken as a basis for the future grant of import permits.

The statement also provided that "the Committee reserved the right to regulate imports of articles which compete with national products" and that "the Committee shall give preference to requests for articles which constitute the special line of the importer."

With reference to the first resolution contained in the statement of the Imports Committee, the latest figures available to this office show that a total of U.S.$15,281,132.53 of foreign exchange was allocated for import purposes during the first three months of 1947, averaging U.S.$5·1 million per month. Compared with the first three months of 1946, this monthly average has increased by U.S.$600,000. Of the three months total, U.S.$12,343,690.72 corresponds to the foreign exchange sold to industry, commerce, and the public in general, while U.S.$590,264.16 was sold to government departments for their importation needs and U.S.$2,347,177.65 was used by the government in payment for services.

The total of U.S.$12,343,690.72 sold to industry, commerce, and the public in general, was used against import permits for the purchase of U.S.$187,506.90 worth of live animals, U.S.$4,852,267.12 worth of foodstuffs, U.S.$683,595.79 worth of prime materials, and U.S.$5,833,337.16 worth of manufactured articles, as well as U.S.$786,983.75 for services.

Bolivian Allocation of Exchange for Imports, January-March, 1947

Sales to the Public:		
Live animals .... U.S.$		187,506 90
Foodstuffs		4,852,267 12
Prime materials		683,595 79
Manufactured articles		5,833,337 16
Total imports by the public		11,556,706 97
Payment for services		786,983 75
Total of sales to commerce, industry and the public..		12,343,690 72
Expenses of State and Administrative Distributions:		
For imports	590,264 16	
Payment for services	2,347,177 65	2,937,441 81
Grand total		15,281,132 53

The above figures are published by the Central Bank of Bolivia, and it is interesting to note that the bank, when referring to these figures, points out that in this same three months period, Bolivia's receipts of foreign exchange amounted to only U.S.$10,328,998.74, leaving a deficit of U.S.$4,952,133.79, or an average monthly deficit of U.S.$1,650,711.26.

Importers Purchasing Exchange on Free Market

In addition to the foreign exchange guaranteed to importers at the official rate of exchange upon the issue of an import permit, importers are able to purchase foreign exchange on the free market. It is believed that importers who apply for a permit, stating that they are in possession of the foreign exchange necessary for the importation in question, in general have their applications granted without investigation into the source of foreign exchange. The official buying rate of exchange for the United States dollar is now bolivianos 42.42, while the United States dollar costs about bolivianos 64.00 on the free market. It, therefore, follows that importers are likely to adopt this method only in special circumstances or for goods capable of being retailed at a price considerably in excess of similar goods of local manufacture or procured with foreign exchange purchased at the official rate. On the other hand, importers of luxury goods, such as spirituous beverages, automobiles, cosmetics, etc., are required upon the issue of an import permit to purchase the necessary foreign exchange at the "gold rate", which is at present bolivianos 75.00 to the United States dollar.

Trade and Tariff Regulations

Australian Import Licensing Regulations Further Amended

Sydney, December 9, 1947.—(FTS)—The Australian cabinet has announced the imposition of further restrictions on imports from dollar countries (November 8 issue of *Foreign Trade*). Canada is affected by a reduction (effective January 1, 1948) in Australian newsprint consumption to 49 per cent of the prewar total of Australian produced and imported newsprint, or 90,000 tons per year. The value of motor car chassis imports is to be limited to £A3,000,000 for the next six months and to £A6,000,000 for the financial year ended June 30, 1949. Other major reductions are in imports of tobacco and petrol, and in film remittances.

New Belgian Import Restrictions Expected

Brussels, December 6, 1947.—(FTS)—It is expected the Belgian Government will announce shortly new measures of a more restrictive character relating to imports. It is strongly recommended that, until details of new measures are made public, Canadian exporters refrain from making shipments unless they are assured by their Belgian consignees that the latter are in possession of necessary import authorization.

China Sets Import Quotas

Shanghai, November 24, 1947.—(FTS)—Import quotas on Schedule II of the Revised Foreign Trade and Exchange Regulations for the fourth quarter of 1947, (November, 1947, to January, 1948, inclusive) are announced by the Export-Import Board of China.

These quotas cover 24 items of commodities and amount to U.S.$53,-393,000, in addition to 500 motor-cars and 800,000 metres of cinematographic films for which no foreign exchange will be provided, as in the third quarter.

The fourth-quarter quotas are as follows:

	U.S. dollars
Gasoline, naphtha, benzine	2,970,000
Liquid fuel (fuel oil)	9,050,000
Kerosene oil	2,000,000
Cotton, raw (to be separately provided for, according to circumstances).	
Rice, wheat and wheat flour	7,000,000
Tobacco leaf	5,000,000
Jute, raw	400,000
Gunny bags	850,000
Coal and coke	500,000
Metals	4,500,000
Chemicals	2,600,000
Paper and wood-pulp	4,500,000
Timber	2,000,000
Wool and wool waste or woollen yarn and thread, mixed	2,000,000
Aniline dyes and other coal-tar dyes, n.o.p.f.: indigo, artificial, and sulphur black	2,275,00
India-rubber, gutta-percha and manufactures thereof	1,500,000
Oil, lubricating	1,000,000
Grease, lubricating	80,000
Oils, fats and waxes, n.o.p.f.	820,000
Machine belting and hose (other than those made of rubber): Leather belting	75,000
Tanning extracts, vegetable, n.o.p.f.	108,000
Sulphate of ammonia; fertilizers; Chile saltpetre	3,000,000
Artificial silk-yarn	565,000
Pharmaceuticals	600,000
	53,393,000

Considerable increases are shown in the quotas allotted for gasoline, naphtha, and benzine; liquid fuel; and sulphate of ammonia; fertilizers and Chile saltpetre, as compared with the allocations for the third quarter, but all other items remain the same.

It is stated that the increased quota for gasoline (U.S.$970,000 higher than for the preceding quarter) takes care of the requirements for civil aviation, while the increase of U.S.$2,050,000 in the quota for liquid fuel is to meet the shortages previously suffered by public utilities, navigation firms and factories.

The quota for sulphate of ammonia, fertilizers, and Chile saltpetre has been increased from U.S.$500,000 to U.S.$3,000,000, due, it is said, to the Government having made such an increase possible through allocation of the world quotas for these commodities.

The quota for raw cotton has not yet been fixed, as it is expected that most of the requirements for this commodity can be met from government and UNRRA stocks and, in case of any deficiency being experienced, the Government will from time to time devise means to supply the demands.

Effective Date of Brazilian Exchange Tax Postponed

Rio de Janeiro, December 10, 1947.—(FTS)—The effective date of the Brazilian 5 per cent tax on exchange transactions has been postponed to January 1, 1948. (See *Foreign Trade* of December 13, 1947.)

India Revalidates Certain Import Licences

Bombay, November 28, 1947.—(FTS)—The Chief Controller of Imports, New Delhi, issued on November 25 a notice regarding the import control policy in India, the substance of which is as follows: On September 1, 1947, it was announced that, with the exception of licences for luxury goods, all import licences revalidated up to September 30, 1947, and licences issued for orders placed before May 16, 1947, under universal Open General Licences VII and VIII, would be valid for shipment of goods before December 31, 1947. It was also stated that this extension was final, but that special consideration might be given to licences for articles which normally take a considerable time to deliver.

In respect to the articles for which special consideration was thus provided, and which are listed in a schedule to the notice, revalidated licences, as well as licences issued for orders placed under Open General Licences Nos. VII and VIII, will now stand automatically extended to June 30, 1948, and will be valid for shipment before that date. With this exception, all revalidated licences, as well as licences issued for orders placed under Open General Licences VII and VIII, will expire on December 31, 1947, and will not be valid for shipment after that date.

The following are among the goods listed in the schedule, for which licences will be valid for shipment up to June 30, 1948: Asbestos manufactures; engine and boiler packings; aluminum in ingots, blocks, bars, circles, sheets and other manufactures; ball, roller or taper bearings; small tools and hand tools; precision and measuring tools; crucibles; machine belting; various types of machinery; textile machinery; electrical instruments, apparatus and accessories; transportation material, including railway equipment; dyes; building and engineering material; earthenware pipes and sanitary ware; printing and lithographic material; agricultural implements; dairy and poultry farming appliances; aeroplanes and parts; ships and vessels; optical, scientific, philosophical and surgical instruments.

The notice also announces that licences issued for the period July-December, 1947, will be valid for shipment for a period of six months from the last date of the month in which the licence was issued. The decision will not apply to articles enumerated in the schedule for which a licence granted for July-December, 1947, will be automatically valid for shipment up to June 30, 1948, irrespective of date of its issue.

The text of the notice is on file in the Foreign Tariffs Section, Commercial Relations and Foreign Tariffs Division, Department of Trade and Commerce, Ottawa.

Palestine Prohibits Entry of Diamonds by Post

Commercial consignments of diamonds may not be shipped by post to Palestine. The postal administration of that country has announced that, for security reasons, the entry of rough, uncut, cut, semi-cut and polished diamonds is prohibited.

Milking Machines Enter Uruguay Duty Free

Buenos Aires, December 4, 1947.—(FTS)—A Uruguayan decree, published November 27, 1947, permits entry into Uruguay, free of customs duty, of mechanical milking machines and accessories.

Certain Fruits and Vegetables Under Export Control

Canada has imposed export controls on certain fruits and vegetables, since the introduction of price ceilings, in order that exports of such produce may not interfere with domestic supplies. The following items have been added to Group I (Agricultural and Vegetable Products) of the scheduled commodities for which an export permit is required:

Fruits—Peaches, in airtight metal containers, or frozen. Pears, in airtight metal containers. Plums (including Italian prunes and Italian prune plums), in airtight metal containers.

Vegetables—Beans (green and wax), in airtight metal containers, or frozen. Corn, frozen. Peas, in airtight metal containers, or frozen. Tomato juice, in airtight metal containers.

Foreign Trade Enquiries

Canadian firms interested in any enquiries listed in this section are requested to communicate directly with the companies or individuals concerned. As far as can be ascertained, they are in good standing, though the Foreign Trade Service cannot assume responsibility for business transactions undertaken with them. A copy of the initial reply from the enquirer should be forwarded to the Department of Trade and Commerce for follow-up purposes. Confidential information concerning the financial status of enquirers may be secured from this Department by bona fide Canadian manufacturers and exporters. In writing this Department in connection with enquiries, the name of the enquirer, file number of the enquiry and the date of issue of *Foreign Trade* in which it was shown should be supplied.

74. **Dominican Republic**—Antonio Barletta, I. la Catolica St., P.O. Box 214, Ciudad Trujillo, Dominican Republic, a firm favourably reported upon, would like to contact Canadian shippers of used cotton flour and sugar bags, once used and unmended, as well as obsolete fancy print and pastel shade bags, of 50 and 100 pounds capacity. While these items are still under export control, this enquiry could be developed for its future possibilities. File: T.E. 273.

Trade Commissioners on Tour

CANADIAN Trade Commissioners return periodically from their posts in foreign lands to familiarize themselves with conditions in this country and the special requirements of the commercial community. They are in a position to furnish information concerning markets in their respective territories and possible sources of supply. Exporters and importers are urged to communicate with these officers, when in their vicinity, with a view to establishing connections that will assist in the promotion of their particular commercial interests, now and in the future. Arrangements for interviews with these trade commissioners should be made directly through the following offices in the areas concerned:

Ottawa—Foreign Trade Service, Department of Trade and Commerce

Belleville—Chamber of Commerce.
Brantford—Board of Trade.
Gananoque—Chamber of Commerce.
Hamilton—Chamber of Commerce.
Kingston—Chamber of Commerce.
Montreal—Montreal Board of Trade.
Pembroke—Chamber of Commerce.
Renfrew—Board of Trade.
St. Catharines—Chamber of Commerce.
Toronto—Can. Manufacturers' Association.
Welland—Board of Trade.

W. G. Stark, former Commercial Secretary, Canadian Embassy, Lima, Peru, continued his Canadian tour in Edmonton on November 14. During the course of the next few months he will discuss trade of Peru and Ecuador with businessmen across the country.

W. G. Stark

(Former Commercial Secretary, Canadian Embassy, Lima)

Brantford—December 19-20.
Hamilton—January 5-7.
St. Catharines—January 8.
Welland—January 9.
Toronto—January 10-28.
Belleville and Batawa—January 29.
Kingston—January 30.
Gananoque—January 31.
Montreal—February 2-21.
Pembroke—February 23.
Renfrew—February 24.
Ottawa—February 25-28.

Additional Copies of Special Issue

Additional copies of the November 22, 1947, issue of *Foreign Trade*, which contains the following features, are obtainable from the King's Printer, Government Printing Bureau, Ottawa, for ten cents each:

(a) Import Restrictions Imposed by Canada to Correct Foreign Exchange Position Here. This includes a detailed list of "prohibited goods" and "goods subject to quota", together with a summary of the various regulations.

(b) Thirty-six-page summary of the multilateral trade agreement, concluded last month in Geneva, Switzerland, and the tariff negotiations between Canada and seventeen other countries.

Ocean-Going Sailing Schedules

Information contained in the following list of sailings, such as destination, port of departure, loading date, name of ship and operator, is furnished by steamship companies and agents concerned. This is the latest available and subject to change after *Foreign Trade* has gone to press, particularly as this relates to the loading date and name of vessel. All ships are not as yet under the complete control of operators, and one or other may have to be withdrawn to fulfil a government demand for space. A substitute ship is normally provided, and the operator will immediately notify shippers of any change in the date of departure. If no substitute is available, operators will advise shippers of an alternative sailing by another line.

The loading date and name of ship are not indicated in some instances, due to the fact that on certain routes information available is not sufficiently definite to mention the steamer that will be placed on a berth for the destination shown. The name of the probable operator is given, however, and exporters should seek further particulars from the operator or agent indicated.

Departures from Halifax

(r) Indicates refrigerated cargo space.
*Sails from Saint John about three days earlier

Destination	Loading Date	Vessel	Operator or Agent
Africa-East—			
Lourenço Marques	January 15-20	*Cumberland County*	March Shipping
Lourenço Marques	February 15-20	*Hants County*	March Shipping
Lourenço Marques	March 15-20	*Yarmouth County*	March Shipping
Africa-South—			
Cape Town Port Elizabeth East London Durban	January 15-20 February 15-20 March 15-20	*Cumberland County* *Hants County* *Yarmouth County*	March Shipping March Shipping March Shipping
Argentina—			
Buenos Aires	December 23	*Beacon Grange*	Furness Withy
Buenos Aires	January 25	*Brazilian Prince*	Furness Withy
Austalia—			
Sydney Melbourne Adelaide	Dec. 22-Jan. 2	*Kaipara*	Montreal Australia New Zealand Line
Belgium—			
Antwerp	December 25-31	*Sein*	Cunard Donaldson
Antwerp	January 18-19	**Beckenham*	Cunard Donaldson
Brazil—			
Rio de Janeiro Santos	December 23	*Beacon Grange*	Furness Withy
Ceylon—			
Colombo	January 15	*Lakeside*	March Shipping
Colombo	February 10	*Seaside*	March Shipping
China—			
Shanghai	December 26	*Islandside*	March Shipping
Shanghai	January 15	*Lakeside*	March Shipping
Shanghai	February 10	*Seaside*	March Shipping
Cuba—			
Santiago	January 2-5	*Dufferin Bell*	Pickford and Black
Denmark—			
Copenhagen	December 19-25	*Ragnhildsholm*	Swedish American
Copenhagen	January 14-20	*Tidaholm*	Swedish American

Departures from Halifax—*Continued*

Destination	Loading Date	Vessel	Operator or Agent
Egypt—			
Port Said.......... Suez..............	January 9-10	*Radja*	Cunard Donaldson
Alexandria..........	December 26	*Islandside*	March Shipping
Finland—			
Helsinki............	December 19-25	*Ragnhildsholm*	Swedish American
Helsinki............	January 14-20	*Tidaholm*	Swedish American
France—			
Le Havre..........	December 25-31	*Sein*	Furness Withy
Germany—			
Hamburg..........	January 18-19	**Beckenham*	Cunard Donaldson
Gibraltar...........	December 25	*Mont Clair*	Montreal Shipping
	January 16	*Mont Gaspe*	Montreal Shipping
Greece—			
Piraeus.............	December 25	*Marchdale*	March Shipping
Piraeus.............	January 20	*Marchport*	Montreal Shipping
Hong Kong—.........	December 26	*Islandside*	March Shipping
	January 15	*Lakeside*	March Shipping
	February 10	*Seaside*	March Shipping
Iceland—			
Reykjavik.........	December 17-24	*Salmon Knot*	F. K. Warren Co.
India and Pakistan—			
Bombay........... Calcutta.......... Madras...........	December 26	*Islandside*	March Shipping
	January 15	*Lakeside*	March Shipping
	February 10	*Seaside*	March Shipping
Italy—			
Genoa..............	December 25	*Mont Clair*	Montreal Shipping
Genoa..............	January 16	*Mont Gaspe*	Montreal Shipping
Naples.............	December 25	*Mont Clair*	Montreal Shipping
Venice.............	December 25	*Marchdale*	March Shipping
Venice.............	January 20	*Marchport*	Montreal Shipping
West Coast Ports....	December 25	*Mont Clair*	Montreal Shipping
	January 16	*Mont Gaspe*	Montreal Shipping
	January 20	*Marchport*	Montreal Shipping
Malayan Union—			
Penang............. Port Swettenham..	January 9-10	*Radja*	Cunard Donaldson
Mediterranean—			
Central and Western Areas..........	December 25	*Marchdale*	Montreal Shipping
	December 25	*Mont Clair*	Montreal Shipping
	January 16	*Mont Gaspe*	Montreal Shipping
	January 20	*Marchport*	Montreal Shipping
Netherlands—			
Amsterdam......... Rotterdam.........	January 18-19	**Beckenham*	Cunard Donaldson
Netherlands East Indies—			
Batavia............ Cheribun........... Samarang.......... Soerabaya..........	January 9-10	*Radja*	Cunard Donaldson
Newfoundland—			
St. John's...........	December 20-23	*Island Connector*	Furness Withy
St. John's...........	December 22	*Blue Peter II*	Montreal Shipping
St. John's...........	December 23-26	*Fort Amherst* (r)	Furness Withy
St. John's...........	December 30	*North Pioneer*	Clarke Steamships
St. John's...........	December 31	*Blue Cloud* (r)	Montreal Shipping
St. John's...........	January 6	*Blue Peter II*	Montreal Shipping

Departures from Halifax—*Continued*

Destination	Loading Date	Vessel	Operator or Agent
Newfoundland—Con			
St. John's	January 10	*North Pioneer*	Clarke Steamships
St. John's	January 14	*Blue Cloud* (r)	Montreal Shipping
St. John's	January 21	*North Pioneer*	Clarke Steamships
St. John's	January 22	*Blue Peter II*	Montreal Shipping
St. John's	January 28	*Blue Cloud* (r)	Montreal Shipping
St. John's	February 6	*Blue Peter II*	Montreal Shipping
Norway—			
Oslo, Stavanger, Bergen	December 19–25	*Ragnhildsholm*	Swedish American
	January 14–20	*Tidaholm*	Swedish American
Poland—			
Gdansk	December 19–25	*Ragnhildsholm*	Swedish American
Gdansk	January 14–20	*Tidaholm*	Swedish American
Portugal—			
Lisbon	December 25	*Marchdale*	Montreal Shipping
Lisbon	December 25	*Mont Clair*	Montreal Shipping
Lisbon	January 16	*Mont Gaspe*	Montreal Shipping
Lisbon	January 20	*Marchport*	March Shipping
Singapore	December 26	*Islandside*	March Shipping
	January 9–10	*Radja*	Cunard Donaldson
	January 15	*Lakeside*	March Shipping
	February 10	*Seaside*	March Shipping
Sweden—			
Gothenburg, Malmo, Norrkoping, Stockholm	December 19–25	*Ragnhildsholm*	Swedish American
	January 14–20	*Tidaholm*	Swedish American
Trieste	December 25	*Marchdale*	Montreal Shipping
	January 20	*Marchport*	March Shipping
Tunisia—			
Lagoulette	December 25	*Marchdale*	Montreal Shipping
United Kingdom—			
Avonmouth	December 20–26	*Boston City*	Furness Withy
Avonmouth	January 5–10	*Montreal City*	Furness Withy
Liverpool	December 24	**Fort Cadotte*	Cunard Donaldson
Liverpool	Dec. 28–Jan. 3	*Ascania* (r)	Cunard Donaldson
Liverpool	December 31	*Asia* (r)	Cunard Donaldson
Liverpool	January 7–9	**Nova Scotia* (r)	Furness Withy
Liverpool	January 17–24	*Port Sydney* (r)	Cunard Donaldson
Liverpool	February 6	*Ascania* (r)	Cunard Donaldson
Liverpool	March 12	*Ascania* (r)	Cunard Donaldson
London	December 22–24	**Sibley Park*	Cunard Donaldson
London	Jan. 29–Feb. 5	*Vasconia* (r)	Cunard Donaldson
Southampton	December 23	*Aquitania*	Cunard Donaldson
Southampton	January 12	*Aquitania*	Cunard Donaldson
Southampton	January 29	*Aquitania*	Cunard Donaldson
Southampton	February 16	*Aquitania*	Cunard Donaldson
Uruguay—			
Montevideo	December 23	*Beacon Grange*	Furness Withy
Montevideo	January 25	*Brazilian Prince*	Furness Withy
West Indies—			
Antigua	December 13–22	*Alcoa Pioneer*	Alcoa Steamships
Antigua	Dec. 26–Jan. 2	**Lady Nelson* (r)	Canadian National
Antigua	Dec. 27–Jan. 5	*A Ship*	Alcoa Steamships
Antigua	January 10–17	**Lady Rodney* (r)	Canadian National
Antigua	January 10–19	*A Ship*	Alcoa Steamships
Antigua	Jan. 24–Feb. 2	*A Ship*	Alcoa Steamships
Bahamas	December 24	*Canadian Challenger* (r)	Canadian National
Bahamas	January 9	*Canadian Cruiser* (r)	Canadian National

Departures from Halifax—*Concluded*

Destination	Loading Date	Vessel	Operator or Agent
West Indies—Con.			
Barbados	December 13-22	*Alcoa Pioneer*	Alcoa Steamships
Barbados	Dec. 26-Jan. 2	**Lady Nelson* (r)	Canadian National
Barbados	Dec. 27-Jan. 5	*A Ship*	Alcoa Steamships
Barbados	January 10-17	**Lady Rodney* (r)	Canadian National
Barbados	January 10-19	*A Ship*	Alcoa Steamships
Barbados	Jan. 24-Feb. 2	*A Ship*	Alcoa Steamships
Bermuda	December 13-22	*Alcoa Pioneer*	Alcoa Steamships
Bermuda	December 22-25	*Fort Townshend* (r)	Furness Withy
Bermuda	Dec. 26-Jan. 2	**Lady Nelson* (r)	Canadian National
Bermuda	Dec. 27-Jan. 5	*A Ship*	Alcoa Steamships
Bermuda	Dec. 29-Jan. 1	*Fort Amherst* (r)	Furness Withy
Bermuda	January 10-17	**Lady Rodney* (r)	Canadian National
Bermuda	January 10-19	*A Ship*	Alcoa Steamships
Bermuda	Jan. 24-Feb. 2	*A Ship*	Alcoa Steamships
Bermuda	Jan. 25-Feb. 2	*Canadian Constructor* (r)	Canadian National
British Guiana	December 13-22	*Alcoa Pioneer*	Alcoa Steamships
British Guiana	Dec. 26-Jan. 2	**Lady Nelson* (r)	Canadian National
British Guiana	Dec. 27-Jan. 5	*A Ship*	Alcoa Steamships
British Guiana	January 10-17	**Lady Rodney* (r)	Canadian National
British Guiana	January 10-19	*A Ship*	Alcoa Steamships
British Guiana	Jan. 24-Feb. 2	*A Ship*	Alcoa Steamships
British Guiana	Jan. 25-Feb. 2	*Canadian Constructor* (r)	Canadian National
Dominica	Dec. 26-Jan. 2	**Lady Nelson* (r)	Canadian National
Dominica	January 10-17	**Lady Rodney* (r)	Canadian National
Dominica	Jan. 25-Feb. 2	*Canadian Constructor* (r)	Canadian National
Grenada	December 13-22	*Alcoa Pioneer*	Alcoa Steamships
Grenada	Dec. 26-Jan. 2	**Lady Nelson* (r)	Canadian National
Grenada	Dec. 27-Jan. 5	*A Ship*	Alcoa Steamships
Grenada	January 10-17	**Lady Rodney* (r)	Canadian National
Grenada	January 10-19	*A Ship*	Alcoa Steamships
Grenada	Jan. 24-Feb. 2	*A Ship*	Alcoa Steamships
Grenada	Jan. 25-Feb. 2	*Canadian Constructor* (r)	Canadian National
Jamaica	December 26	*Canadian Challenger* (r)	Canadian National
Jamaica	December 27-30	*Dufferin Bell*	Pickford and Black
Jamaica	January 9	*Canadian Cruiser* (r)	Canadian National
Jamaica	January 12-16	*A Ship*	Pickford and Black
Jamaica	February 10-13	*Dufferin Bell*	Pickford and Black
Montserrat	Dec. 26-Jan. 2	**Lady Nelson* (r)	Canadian National
Montserrat	January 10-17	**Lady Rodney* (r)	Canadian National
St. Kitts	December 13-22	*Alcoa Pioneer*	Alcoa Steamships
St. Kitts	Dec. 26-Jan. 2	**Lady Nelson* (r)	Canadian National
St. Kitts	Dec. 27-Jan. 5	*A Ship*	Alcoa Steamships
St. Kitts	January 10-17	**Lady Rodney* (r)	Canadian National
St. Kitts	January 10-19	*A Ship*	Alcoa Steamships
St. Kitts	Jan. 24-Feb. 2	*A Ship*	Alcoa Steamships
St. Kitts	Jan. 25-Feb. 2	*Canadian Constructor* (r)	Canadian National
St. Lucia	December 13-22	*Alcoa Pioneer*	Alcoa Steamships
St. Lucia	Dec. 26-Jan. 2	**Lady Nelson* (r)	Canadian National
St. Lucia	Dec. 27-Jan. 5	*A Ship*	Alcoa Steamships
St. Lucia	January 10-17	**Lady Rodney* (r)	Canadian National
St. Lucia	January 10-19	*A Ship*	Alcoa Steamships
St. Lucia	Jan. 24-Feb. 2	*A Ship*	Alcoa Steamships
St. Lucia	Jan. 25-Feb. 2	*Canadian Constructor* (r)	Canadian National
St. Vincent	December 13-22	*Alcoa Pioneer*	Alcoa Steamships
St. Vincent	Dec. 26-Jan. 2	**Lady Nelson* (r)	Canadian National
St. Vincent	Dec. 27-Jan. 5	*A Ship*	Alcoa Steamships
St. Vincent	January 10-17	**Lady Rodney* (r)	Canadian National
St. Vincent	January 10-19	*A Ship*	Alcoa Steamships
St. Vincent	Jan. 24-Feb. 2	*A Ship*	Alcoa Steamships
St. Vincent	Jan. 25-Feb. 2	*Canadian Constructor* (r)	Canadian National
Trinidad	December 13-22	*Alcoa Pioneer*	Alcoa Steamships
Trinidad	Dec. 26-Jan. 2	**Lady Nelson* (r)	Canadian National
Trinidad	Dec. 27-Jan. 5	*A Ship*	Alcoa Steamships
Trinidad	January 10-17	**Lady Rodney* (r)	Canadian National
Trinidad	January 10-19	*A Ship*	Alcoa Steamships
Trinidad	Jan. 24-Feb. 2	*A Ship*	Alcoa Steamships
Trinidad	Jan. 25-Feb. 2	*Canadian Constructor* (r)	Canadian National

Departures from Saint John

(r) Indicates refrigerated cargo space.

Destination	Loading Date	Vessel	Operator or Agent
Africa-East—			
Lourenço Marques	December 19–29	*Chandler*	Elder Dempster
Lourenço Marques	January 8–18	*Cambray*	Elder Dempster
Beira	December 19–29	*Chandler*	Elder Dempster
Beria	January 8–18	*Cambray*	Elder Dempster
Africa-South—			
Cape Town, Port Elizabeth, East London, Durban	December 19–29	*Chandler*	Elder Dempster
	January 8–18	*Cambray*	Elder Dempster
Australia—			
Brisbane, Sydney, Melbourne	January 2–9	*City of Ely*	Montreal Australia New Zealand Line
Belgium—			
Antwerp	December 24–30	*Twickenham*	Cunard Donaldson
Antwerp	January 5	*Hedel*	Shipping Limited
Antwerp	January 6	*Marchcape*	March Shipping
Antwerp	January 10	*Brant County*	Canada Steamships
Antwerp	January 18	*Mont Alta*	Montreal Shipping
Antwerp	January 28	*Mont Sorrel*	Montreal Shipping
Antwerp	February 5	*Kent County*	Montreal Shipping
Ceylon—			
Colombo	December 17–22	*Merchant Prince*	McLean Kennedy
Colombo	January 10–15	*Forest*	McLean Kennedy
China—			
Shanghai	January 20–25	*City of Carlisle*	McLean Kennedy
Colombia—			
Barranquilla	January 15–20	*Apollo* (r)	Saguenay Terminals
Dominican Republic			
Ciudad Trujillo	January 15–20	*Apollo* (r)	Saguenay Terminals
Eire—			
Cork, Dublin	January 5	*Irish Poplar*	Shipping Limited
Dublin	January 4–10	*Lord Glentoran*	McLean Kennedy
Dublin	February 1–7	*Fanad Head*	McLean Kennedy
France—			
Le Havre	January 10	*Brant County*	Canada Steamships
Le Havre	January 18	*Mont Alta*	Montreal Shipping
Le Havre	January 28	*Mont Sorrel*	Montreal Shipping
Le Havre	February 5	*Kent County*	Canada Steamships
Germany—			
Hamburg	December 24–30	*Twickenham*	Cunard Donaldson
Hamburg	January 18	*Mont Alta*	Montreal Shipping
Haiti—			
Port au Prince	January 15–20	*Apollo* (r)	Saguenay Terminals
Hong Kong	January 20–25	*City of Carlisle*	McLean Kennedy
India and Pakistan—			
Bombay, Calcutta, Madras, Karachi	December 17–22	*Merchant Prince*	McLean Kennedy
	January 10–15	*Forest*	McLean Kennedy
Italy—			
West Coast Ports	January 16	*Capo Vita*	Furness Withy
Mexico—			
Vera Cruz	January 1–3	*Federal Pioneer*	McLean Kennedy

Departures from Saint John—*Continued*

Destination	Loading Date	Vessel	Operator or Agent
Netherlands—			
Amsterdam, Rotterdam	December 24-30	*Twickenham*	Cunard Donaldson
Rotterdam	January 5	*Hedel*	Shipping Limited
Rotterdam	January 6	*Marchcape*	March Shipping
Rotterdam	January 10	*Brant County*	Canada Steamships
Rotterdam	January 20	*Mont Alta*	Montreal Shipping
Rotterdam	January 28	*Mont Sorrel*	Montreal Shipping
Netherlands West Indies—			
Curaçao	January 15-20	*Apollo* (r)	Saguenay Terminals
New Zealand—			
Auckland, Wellington, Lyttelton, Dunedin	January 16-24	*City of St. Albans*	Montreal Australia New Zealand Line
Northern Ireland—			
Belfast	Dec. 28-Jan. 2	*Lord O'Neill*	McLean Kennedy
Belfast	January 26-31	*Torr Head*	McLean Kennedy
Norway—			
Oslo	December 22-24	*Frierfjord*	March Shipping
Oslo	December 24	*Ranenfjord*	March Shipping
Philippines—			
Manila	January 20-25	*City of Carlisle*	McLean Kennedy
Poland—			
Gdynia	December 26	*Mont Sandra*	Montreal Shipping
United Kingdom—			
Avonmouth	December 19-26	*Moveria* (r)	Cunard Donaldson
Avonmouth	December 23-30	*Salacia* (r)	Cunard Donaldson
Avonmouth	Dec. 31-Jan. 7	*Dorelian*	Cunard Donaldson
Avonmouth	December 27	*Moveria* (r)	Cunard Donaldson
Avonmouth	January 5-12	*Carmia* (r)	Cunard Donaldson
Avonmouth	February 3-10	*Gracia* (r)	Cunard Donaldson
Glasgow	December 19-26	*Norwegian*	Cunard Donaldson
Glasgow	Dec. 28-Jan. 6	*Delilian* (r)	Cunard Donaldson
Glasgow	January 14-21	*Corrientes* (r)	Cunard Donaldson
Glasgow	February 9-16	*Norwegian*	Cunard Donaldson
Hull	December 20-27	*Consuelo* (r)	McLean Kennedy
Hull	Dec. 29-Jan. 2	*Eucadia* (r)	McLean Kennedy
Leith	December 25-30	*Cairnesk* (r)	McLean Kennedy
Liverpool	December 23-30	*Salacia* (r)	Cunard Donaldson
Liverpool	December 23-29	*Beaverford*	Canadian Pacific
Liverpool	December 27	*Moveria* (r)	Cunard Donaldson
Liverpool	Dec. 28-Jan. 2	*Lord O'Neill*	McLean Kennedy
Liverpool	Dec. 28-Jan. 6	*Asia* (r)	Cunard Donaldson
Liverpool	January 1-8	*Beaverburn*	Canadian Pacific
Liverpool	January 4-10	*Lord Glentoran*	McLean Kennedy
Liverpool	January 7-12	*Empress of Canada* (r)	Canadian Pacific
Liverpool	January 18-25	*Arabia* (r)	Cunard Donaldson
Liverpool	January 26-31	*Torr Head*	McLean Kennedy
Liverpool	Jan. 30-Feb. 5	*Fort Miami* (r)	Cunard Donaldson
Liverpool	February 1-7	*Fanad Head*	McLean Kennedy
London	December 17-25	*Beaverlake*	Canadian Pacific
London	Dec. 28-Jan. 3	*Beaverglen* (r)	Canadian Pacific
London	Dec. 31-Jan. 7	*Beavercove* (r)	Canadian Pacific
London	January 5-12	*Port Melbourne* (r)	Cunard Donaldson
London	January 6	*Valacia* (r)	Cunard Donaldson
London	January 14-21	*Beaverdell*	Canadian Pacific
London	Jan. 25-Feb. 2	*Hillcrest Park*	Cunard Donaldson
Manchester	December 25	*Manchester Regiment* (r)	Furness Withy
Manchester	December 30	*Manchester Division* (r).	Furness Withy
Manchester	January 1	*Manchester Progresss* (r)	Furness Withy

Departures from Saint John—*Concluded*

Destination	Loading Date	Vessel	Operator or Agent
United Kingdom —Con.			
Manchester	January 11	*Manchester Shipper* (r)	Furness Withy
Manchester	January 29	*Manchester Commerce* (r)	Furness Withy
Manchester	February 5	*Manchester Regiment* (r)	Furness Withy
Newcastle	December 25-30	*Cairnesk* (r)	Furness Withy
Venezuela—			
La Guaira	January 15-20	*Apollo* (r)	Saguenay Terminals

Departures from Vancouver

Ships listed under "Departures from Vancouver" may possibly be loading in addition at New Westminster. Exporters should communicate with agents in Vancouver to obtain information concerning loading dates, berths, available cargo space and rates.

(r) Indicates refrigerated cargo space.

Destination	Loading Date	Vessel	Operator or Agent
Africa-East—			
Lourenço Marques	January 5	*Silverwalnut*	Dingwall Cotts
Lourenço Marques	January 9-26	*Lake Atlin*	North Pacific
Africa-South—			
Cape Town, Port Elizabeth, East London, Durban	January 5	*Silverwalnut*	Dingwall Cotts
	January 9-26	*Lake Atlin*	North Pacific
Cape Town, East London, Durban, Walvis Bay	Dec. 15-Jan. 10	*A Ship*	North Pacific
Argentina—			
Buenos Aires	December 25	*Falkanger*	Empire Shipping
Buenos Aires	January 6	*Mormacland*	Balfour Guthrie
Belgium—			
Antwerp	December 22	*Bolivia*	Gardner Johnson
Antwerp	December 26	*Valognes*	Empire Shipping
Antwerp	January 5	*Seattle*	Gardner Johnson
Antwerp	January 17	*Rouen*	Empire Shipping
Brazil—			
Rio de Janeiro	January 6	*Mormacland*	Balfour Guthrie
Burma—			
Rangoon	December 27	*Lawak*	Dingwall Cotts
Chile—			
Valparaiso	December 25	*Falkanger*	Empire Shipping
China—			
Shanghai, Taku Bar	January 14	*Vingnes*	Empire Shipping
Shanghai	Dec. 21-Jan. 6	*Lake Okanagan*	Canada Shipping
Shanghai	January 3-4	*Canada Mail*	American Mail Line
Shanghai	January 19-20	*Oregon Mail*	American Mail Line
Shanghai	Jan. 27-Feb. 11	*Lake Nipigon*	North Pacific
Colombia—			
Barranquilla	January 20	*Don Aurelio*	Empire Shipping
Cyprus—			
Morphou Bay	December 21	*William Glackens*	Empire Shipping

Destination	Loading Date	Vessel	Operator or Agent
Egypt—			
Alexandria	December 21	*William Glackens*	Empire Shipping
France—			
Le Havre	December 26	*Valognes*	Empire Shipping
Le Havre	January 17	*Rouen*	Empire Shipping
Marseilles	December 21	*William Glackens*	Empire Shipping
Greece—			
Piraeus	December 21	*William Glackens*	Empire Shipping
Guatemala—			
San Jose de Guatemala	January 20	*Don Aurelio*	Empire Shipping
Hong Kong	January 3-4	*Canada Mail*	American Mail Line
	January 14	*Bougainville*	Balfour Guthrie
	January 19-20	*Oregon Mail*	American Mail Line
	February 14	*Roseville*	Balfour Guthrie
	March 14	*Castleville*	Balfour Guthrie
	April 14	*Francisville*	Balfour Guthrie
India and Pakistan—			
Bombay, Karachi	December 24	*Limburg*	Dingwall Cotts
	Late February	*Zeeman*	Dingwall Cotts
Madras, Calcutta	Early February	*Silverguava*	Dingwall Cotts
Bombay, Madras	Jan. 27-Feb. 11	*Lake Nipigon*	North Pacific
Calcutta	December 27	*Lawak*	Dingwall Cotts
Calcutta	Jan. 20-Feb. 4	*Lake Pennask*	North Pacific
Italy—			
Genoa	December 21	*William Glackens*	Empire Shipping
Japan—			
Yokohama	January 3-4	*Canada Mail*	American Mail Line
Yokohama	January 19-20	*Oregon Mail*	American Mail Line
Yokohama	Jan. 29-Feb. 4	*Lake Chilliwack*	Empire Shipping
Malayan Union—			
Penang, Port Swettenham	January 14	*Bougainville*	Balfour Guthrie
	February 14	*Roseville*	Balfour Guthrie
	March 14	*Castleville*	Balfour Guthrie
	April 14	*Francisville*	Balfour Guthrie
Port Swettenham	Jan. 20-Feb. 4	*Lake Pennask*	North Pacific
Morocco—			
Casablanca	December 21	*William Glackens*	Empire Shipping
Netherlands—			
Rotterdam	December 26	*Valognes*	Empire Shipping
Rotterdam	January 17	*Rouen*	Empire Shipping
Netherlands East Indies—			
Batavia, Soerabaya	December 24	*Limburg*	Dingwall Cotts
	December 27	*Lawak*	Dingwall Cotts
	January 14	*Bougainville*	Balfour Guthrie
	February 14	*Roseville*	Balfour Guthrie
	Late February	*Zeeman*	Dingwall Cotts
	March 14	*Castleville*	Balfour Guthrie
	April 14	*Francisville*	Balfour Guthrie
Palestine—			
Haifa	December 21	*William Glackens*	Empire Shipping
Philippines—			
Manila, Iloilo, Cebu	January 3-4	*Canada Mail*	American Mail Line
	January 14	*Bougainville*	Balfour Guthrie
	January 19-20	*Oregon Mail*	American Mail Line
	February 14	*Roseville*	Balfour Guthrie
	March 14	*Castleville*	Balfour Guthrie
	April 14	*Francisville*	Balfour Guthrie

Departures from Vancouver—*Concluded*

Destination	Loading Date	Vessel	Operator or Agent
Phillipines—Con.			
Manila	December 24	*Limburg*	Dingwall Cotts
Manila	December 27	*Lawak*	Dingwall Cotts
Manila	January 14	*Vingnes*	Empire Shipping
Manila	Early February	*Silverguava*	Dingwall Cotts
Manila	Late February	*Zeeman*	Dingwall Cotts
Singapore	January 14	*Bougainville*	Balfour Guthrie
	Early February	*Silverguava*	Dingwall Cotts
	February 14	*Roseville*	Balfour Guthrie
	March 14	*Castleville*	Balfour Guthrie
	April 14	*Francisville*	Balfour Guthrie
Sweden—			
Gothenburg	December 22	*Bolivia*	Gardner Johnson
Stockholm	January 5	*Seattle*	Gardner Johnson
Salvador—			
La Libertad, La Union	January 20	*Don Aurelio*	Empire Shipping
Taiwan	Dec. 21–Jan. 6	*Lake Okanagan*	Canada Shipping
Tunis—			
Bizerte	December 21	*William Glackens*	Empire Shipping
United Kingdom—			
Liverpool, London, Manchester	February	*Pacific Shipper*	Furness Pacific
London	December 11-28	*Lake Manitou*	Empire Shipping
London	Dec. 27–Jan. 14	*Lake Athabasca*	Anglo Canadian
Miscellaneous Ports	January 6	*Parthenia*	Balfour Guthrie
	January 13	*Norah Moller*	Empire Shipping
	February	*Lakonia*	Balfour Guthrie
Venezuela—			
La Guaira, Maracaibo, Puerto Cabello	January 20	*Don Aurelio*	Empire Shipping
West Indies—			
Trinidad	January 6	*Mormacland*	Balfour Guthrie

Canadian Certified Seed Potatoes

Growers, shippers and buyers of Canadian Certified Seed Potatoes may be interested in a brochure prepared by the Foreign Trade Service, in consultation with the Department of Agriculture, in an effort to stimulate the export sale of potatoes. Copies of this brochure, in colour, may be obtained from the Director, Trade Publicity Division, Foreign Trade Service, Department of Trade and Commerce, Ottawa.

Foreign Trade Service Abroad

Cable address:—*Canadian*, unless otherwise shown.

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

Argentina

Buenos Aires—H. L. Brown, Commercial Secretary, Canadian Embassy, Bartolomé Mitre 478.

Territory includes Uruguay and Paraguay.

Australia

Sydney—C. M. Croft, Commercial Counsellor for Canada, City Mutual Life Building, Hunter and Bligh Streets. Address for letters: Post Office Box 3952V.

Territory includes the Australian Capital Territory, New South Wales, Queensland, Northern Territory and Dependencies.

Melbourne—F. W. Fraser, Commercial Secretary for Canada, 83 William Street.

Territory includes States of Victoria, South Australia, Western Australia, and Tasmania.

Belgian Congo

Leopoldville—L. H. Ausman, Canadian Government Trade Commissioner, Palace Hotel. Address for letters: Boîte Postale 373.

Territory includes Angola and French Equatorial Africa.

Belgium

Brussels—B. A. Macdonald, Commercial Secretary, Canadian Embassy, 46 rue Montoyer.

Brazil

Rio de Janeiro—Maurice Bélanger, Commercial Secretary, Canadian Embassy, Ed. Metropòle, Avenida Presidente Wilson, 165. Address for letters: Caixa Postal 2164.

São Paulo—J. C. Depocas, Canadian Government Trade Commissioner, Canadian Consulate, Edificio Alois, Rua 7 de Abril 252. Address for letters: Caixa Postal 6034.

Chile

Santiago—J. L. Mutter, Commercial Secretary, Canadian Embassy, Bank of London and South America Building. Address for letters: Casilla 771.

Territory includes Bolivia.

China

Shanghai—L. M. Cosgrave. Commercial Counsellor for Canada, 27 The Bund. Postal District (0).

Colombia

Bogotá—H. W. Richardson, Acting Canadian Government Trade Commissioner, Edificio Colombiana de Seguros. Address for letters: Apartado 1618. Address for air mail: Apartado Aereo 3562.

Territory includes Republic of Panama and the Canal Zone.

Cuba

Havana—R. G. C. Smith, Commercial Secretary, Canadian Legation, Avenida de las Misiones 17. Address for letters: Apartado 1945.

Territory includes Haiti, Dominican Republic and Puerto Rico.

Egypt

Cairo—J. M. Boyer, Canadian Government Trade Commissioner, 22 Shari Kasr el Nil. Address for letters: Post Office Box 1770.

Territory includes the Sudan, Palestine, Cyprus, Iraq, Syria and Iran.

France

Paris—Yves Lamontagne, Commercial Counsellor, Canadian Embassy, 3 rue Scribe.

Territory includes Switzerland, Algeria, French Morocco and Tunisia.

Germany

Frankfurt—D. W. Jackson, Canadian Economic Representative, % Allied Contact Section, H.Q. EUCOM, Frankfurt, A.P.O. 757, U.S. Army.

Cable address, Canadian Frankfurt/Main.

Greece

Athens—T. J. Monty, Commercial Secretary, Canadian Embassy, 31 Vassilissis Sophias Avenue.

Territory includes Turkey.

Guatemala

Guatemala City—C. B. Birkett, Canadian Government Trade Commissioner, Post Office Box 400.

Territory includes Costa Rica, El Salvador, Honduras and Nicaragua.

Hong Kong

Hong Kong—K. F. Noble, Canadian Government Trade Commissioner, Hong Kong Bank Building. Address for letters: Post Office Box 126.

Territory includes South China, the Philippine Islands and French Indo-China.

India

Bombay—Richard Grew, Commercial Secretary for Canada, Gresham Assurance House, Mint Road. Address for letters: Post Office Box 886.

Territory includes Burma and Ceylon.

Ireland

Dublin—H. L. E. Priestman, Commercial Secretary for Canada, 66 Upper O'Connell Street.

Belfast—H. L. E. Priestman, Canadian Government Trade Commissioner, 36 Victoria Square.

Italy

Rome—J. P. Manion, Commercial Secretary, Canadian Legation, via Saverio Mercadante 15-17. Address for letters: Casella Postale 475. (Telephones—471-597 and 470-708.)

Territory includes Czechoslovakia, Malta, Yugoslavia and Libya.

Foreign Trade Service Abroad—Concluded

Jamaica

Kingston—M. B. Palmer, Canadian Government Trade Commissioner, Canadian Bank of Commerce Chambers. Address for letters: Post Office Box 225.
Territory includes the Bahamas and British Honduras.

Malayan Union

Singapore—Paul Sykes, Canadian Government Trade Commissioner, Room D-2, Union Building. Address for letters: Post Office Box 845.
Territory includes North Borneo, Brunei, Sarawak, Siam and Netherlands East Indies.

Mexico

Mexico City—D. S. Cole, Commercial Counsellor, Canadian Embassy, Edificio Internacional, Paseo de la Reforma. Address for letters: Apartado Num. 126-Bis.

Netherlands

The Hague—J. A. Langley, Commercial Counsellor, Canadian Embassy, Sophialaan 1-A.

Newfoundland

St. John's—J. C. Britton, Commercial Secretary, Office of the High Commissioner for Canada, Circular Road.

New Zealand

Wellington—P. V. McLane, Commercial Secretary, Office of the High Commissioner for Canada, Post Office Box 1660.
Territory includes Fiji and Western Samoa.

Norway

Oslo—S. G. MacDonald, Commercial Secretary, Canadian Legation, Fridtjof Nansens Plass 5.
Territory includes Denmark and Greenland.

Pakistan

Karachi—G. A. Browne, Acting Canadian Government Trade Commissioner. Address for letters: Post Office Box 531.

Peru

Lima—C. J. Van Tighem, Commercial Secretary, Canadian Embassy, Edificio Boza, Carabaya 831, Plaza San Martin. Address for letters: Casilla 1212.
Territory includes Ecuador.

Portugal

Lisbon—L. S. Glass, Canadian Government Trade Commissioner, Canadian Consulate General, Rua Rodrigo da Fonseca 103.
Territory includes the Azores and Madeira, Spain, Spanish Morocco, the Canary Islands and Gibraltar.

South Africa

Johannesburg—J. H. English, Commercial Counsellor for Canada, Mutual Buildings, Harrison Street. Address for letters: Post Office Box 715.
Territory includes Transvaal, Natal, Southern Rhodesia, Northern Rhodesia, Mozambique or Portuguese East Africa, and Nyasaland.
Cable address, Cantracom.

Cape Town—S. V. Allen, Commercial Secretary for Canada, New South African Mutual Buildings, 21 Parliament Street. Address for letters: Post Office Box 683.
Territory includes Cape Province, Orange Free State, South-West Africa, Mauritius and Madagascar.
Cable address, Cantracom.

Sweden

Stockholm—F. H. Palmer, Commercial Counsellor, Canadian Legation, Strandvägen 7-C. Address for letters: Post Office Box 14042.
Territory includes Finland.

Trinidad

Port-of-Spain—T. G. Major, Canadian Government Trade Commissioner, Colonial Life Insurance Building. Address for letters: Post Office Box 125.
Territory includes Barbados, Windward and Leeward Islands, British Guiana, Dutch Guiana, French Guiana, and the French West Indies.

United Kingdom

London—A. E. Bryan, Commercial Counsellor, Office of the High Commissioner for Canada, Canada House, Trafalgar Square, S.W.1.
Cable address, Sleighing, London.

London—R. P. Bower, Commercial Secretary, Office of the High Commissioner for Canada, Canada House, Trafalgar Square, S.W.1.
Territory includes the South of England, East Anglia and British West Africa (Gold Coast, Sierra Leone and Nigeria).
Cable address, Sleighing, London.

Liverpool—M. J. Vechsler, Canadian Government Trade Commissioner, Martins Bank Building, Water Street.
Territory includes the Midlands, North of England and Wales.

Glasgow—G. F. G. Hughes, Acting Canadian Government Trade Commissioner, 200 St. Vincent Street.
Territory covers Scotland and Iceland.
Cable address, Cantracom.

United States

Washington—H. A. Scott, Commercial Counsellor, Canadian Embassy, 1746 Massachusetts Avenue, N.W.

New York City—M. T. Stewart, Canadian Government Trade Commissioner, British Empire Building, Rockefeller Centre.
Territory includes Bermuda.
Cable address, Cantracom.

Los Angeles—V. E. Duclos, Canadian Government Trade Commissioner, Associated Realty Building, 510 West Sixth Street.

Venezuela

Caracas—C. S. Bissett, Canadian Government Trade Commissioner, Canadian Consulate General, Edificio America. Address for letters 8° Piso. Esq. Veroes.
Territory includes Netherlands West Indies.

Foreign Exchange Quotations

The following are nominal quotations, based on rates available in London or New York and converted into Canadian terms at the mid-rate for sterling or par for United States dollars, as furnished by the Foreign Exchange Division of the Bank of Canada. These quotations may be found useful in considering statistics and prices generally, but Canadian exporters are reminded that the kinds of currency which may be accepted for exports to different countries are specifically covered by the Foreign Exchange Control Act and Regulations, and that funds may sometimes be tendered in payment for exports, which cannot, in fact, be transferred to Canada. Both importers and exporters are advised to communicate with their bankers before completing financial arrangements for the sale or purchase of commodities, to ensure that the method of payment contemplated is not only possible but that it is in accordance with the Foreign Exchange Control Act and Regulations.

Country	Monetary Unit		Nominal Quotations Dec. 8	Nominal Quotations Dec. 15
Argentina	Peso	Off.	·2977	·2977
		Free	·2490	·2490
Australia	Pound	....	3·2240	3·2240
Belgium and Belgian Congo	Franc	....	·0228	·0228
Bolivia	Boliviano	....	·0238	·0238
British West Indies (except Jamaica)	Dollar	....	·8396	·8396
Brazil	Cruzeiro	....	·0544	·0544
Chile	Peso	Off.	·0517	·0517
		Export	·0322	·0322
Colombia	Peso	....	·5714	·5714
Cuba	Peso	....	1·0000	1·0000
Czechoslovakia	Koruna	....	·0200	·0200
Denmark	Krone	....	·2083	·2083
Ecuador	Sucre	....	·0740	·0740
Egypt	Pound	....	4·1330	4·1330
Eire	Pound	....	4·0300	4·0300
Fiji	Pound	....	3·6306	3·6306
Finland	Markka	....	·0073	·0073
France and French North Africa	Franc	....	·0084	·0084
French Empire—African	Franc	....	·0142	·0142
French Pacific Possessions	Franc	....	·0201	·0201
Haiti	Gourde	....	·2000	·2000
Hong Kong	Dollar	....	·2518	·2518
Iceland	Krona	....	·1541	·1541
India	Rupee	....	·3022	·3022
Iraq	Dinar	....	4·0300	4·0300
Italy	Lira	....	·0017	·0017
Jamaica	Pound	....	4·0300	4·0300
Malayan Union	Dollar	....	·4701	·4701
Mexico	Peso	....	·2059	·2059
Netherlands	Florin	....	·3769	·3769
Netherlands East Indies	Florin	....	·3769	·3769
Netherlands West Indies	Florin	....	·5302	·5302
New Zealand	Pound	....	3·2402	3·2402
Norway	Krone	....	·2015	·2015
Pakistan	Rupee	....	·3022	·3022
Palestine	Pound	....	4·0300	4·0300
Peru	Sol	....	·1538	·1538
Philippines	Peso	....	·5000	·5000
Portugal	Escudo	....	·0403	·0403
Siam	Baht	....	·1000	·1000
Spain	Peseta	....	·0916	·0916
Sweden	Krona	....	·2783	·2783
Switzerland	Franc	....	·2336	·2336
Turkey	Piastre	....	·0035	·0035
Union of South Africa	Pound	....	4·0300	4·0300
United Kingdom	Pound	....	4·0300	4·0300
United States	Dollar	....	1·0000	1·0000
Uruguay	Peso	Controlled	·6583	·6583
		Uncontrolled	·5629	·5629
Venezuela	Bolivar	....	·2985	·2985