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COVER SUBJECT—S.S. *Lady Nelson* at anchor off Plymouth, capital of Montserrat, with which Canada maintains close trade relations. Discovered by Christopher Columbus in 1493, this island in the Leeward Group of the British West Indies was first colonized by the British in 1632. The old town clock still serves a useful purpose in Montserrat, which is noted for its lime juice and lime oils. Cotton, however, is the principal crop.

Photo by Canadian National Steamships

Political and Economic Problems Delay Reconstruction in China

Democratic form of government introduced on January 1, 1948, but Communist control of large areas renders difficult the implementation of its development program—Fantastic inflation of national currency nullifies efforts—Communications disrupted.

By L. M. Cosgrave, Commercial Counsellor for Canada

(Editor's Note—This is the first in a series of six articles on economic conditions in China, prepared by Mr. Cosgrave for *Foreign Trade*, and is the first general review of that country presented since 1940.)

SHANGHAI, May 6, 1948.—China officially adopted a democratic form of government on January 1, 1948, but it would appear more democratic in theory than in fact, as the implementation of its development program is extremely difficult with large sections of China and the population of this country under Communist control. Furthermore, communications, both rail and water, are disrupted, and the fantastic inflation of the national currency has nullified all efforts of the government to establish industrial and agricultural equilibrium. Difficult economic conditions, which prevail throughout the world, were more noticeable in 1947 in the Far East than in other trading areas.

The inability of the National Government of China to reassert its sovereignty over the rich agricultural and industrial northeast provinces of Manchuria, on which the general economic life of China was so greatly dependent, and on which her postwar rehabilitation was largely planned, is the outstanding political factor since the end of the Second World War. Despite the long and patient efforts of General George C. Marshall, who was specially charged by the United States to assist the National Government in stabilizing its relations with the Communists and dissident elements in the North, a complete breakdown of negotiations occurred during 1947. This was followed by a resumption of civil war on a large scale, which spread from Manchuria into North China and south to the Yellow River. The area south of the Yangtze is still fairly free from infiltration by the Communists, though it is believed their activities are responsible for the many labour disturbances from which the large towns have suffered.

Creation of Prosperity in Southwest Sought

Special significance attaches to the appointment of T. V. Soong, former Minister of Finance, as Governor of Kwangtung during the autumn of 1947. This important province in the southwest lies opposite Hong Kong. It is maintained in some circles that this decision was actuated by the fear of disaffection of the southern provinces, though it was believed that Dr. Soong was the only man who could implement the ambitious plans for the development of communications, agriculture and industry. It is hoped that the creation of prosperous conditions in the southeastern provinces will counteract Communistic tendencies, and that an improvement in the material welfare of the people will provide those in the central areas with confidence in the National Government.

The continued deterioration in the political situation is reflected in its repercussions on the financial structure. Externally, there has been a heavy adverse balance of trade, the deficit in 1947 amounting to approxi-



China—The Bund, at Shanghai. Although democratic form of government was introduced on January 1, 1948, Communist control of large areas renders implementation of its program difficult. Economic problems are also hindering reconstruction.

mately U.S.\$325 million, imports being valued at around U.S.\$560 million and exports at U.S.\$235 million. Thus, without taking into consideration Chinese expenditure abroad, invisible exports that include some U.S.\$11 million in remittances from Chinese overseas, and approximately U.S.\$100 million for the expenses of foreigners and foreign plants in China, the deficit in China's international payments represents some U.S.\$200 million. China's resources of gold and foreign exchange up to January 1, 1948, were recently estimated by the United States Secretary of State, George C. Marshall, at approximately U.S.\$274 million. From this must be subtracted a further sum of U.S.\$73 million, representing the import quota requirements for January to July of this year. Thus, China's total resources of gold and foreign exchange probably do not exceed U.S.\$200 million, or a sum merely sufficient to cover the deficit in international payments in 1947.

This lack of foreign exchange must naturally lead to a further cut in the already limited imports, while the spreading civil war and destruction of communications seriously retards the promotion of Chinese exports.

Increasing Civil War Costs

Internally, the government has been faced with increasing expenditures on the civil war, which are estimated at some 80 per cent of China's total budget. Deficits in other government expenditures have of necessity

been met by an increased issue of currency, as inflation expenditure has risen and the national income is now estimated to meet only from 30 per cent to 40 per cent of 1948 budgetary requirements.

In this connection, the Chinese Finance Ministry has just announced the National Budget for the first six months of 1948, rather than for the full financial year, as in the past. The estimated expenditure for the half year is C.N.C.\$96 trillion, estimated revenue C.N.C.\$58 trillion, and estimated deficit for January-June C.N.C.\$38 trillion. No mention, however, was made of extraordinary military expenditure, the total amount of which will depend on the development of the civil war, or of items of extraordinary revenue, such as special taxes, Japanese and ex-puppet property sales, and so-called special contributions.

In terms of United States dollars, calculated at the current open market exchange rate, China's half-yearly expenditure would amount to U.S.\$1 billion and the deficit for only six months to U.S.\$450 million.

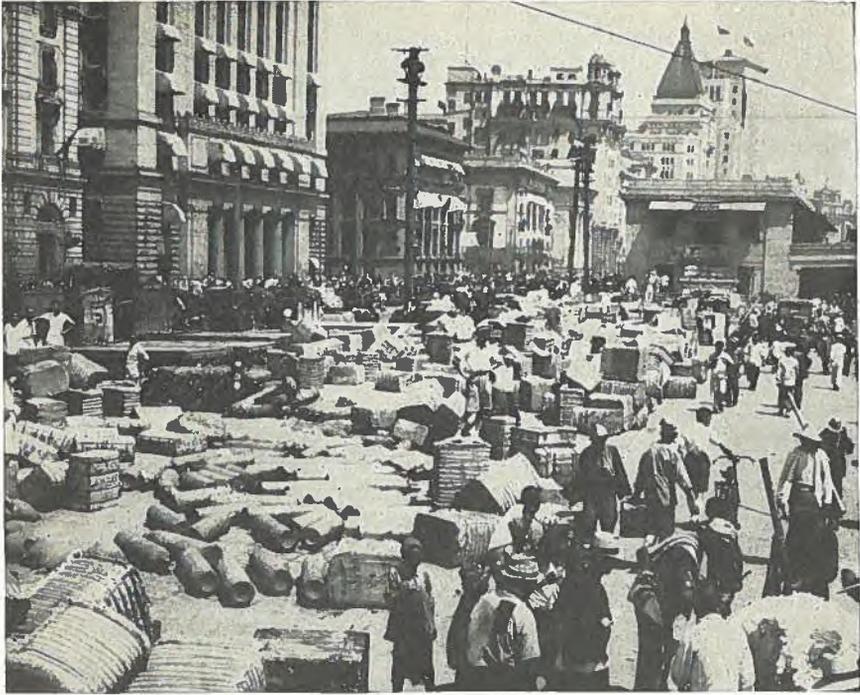
It seems probable that the government estimate for 1948 will have to be revised several times during the current year, as was the case in 1947, and that the total deficit for the 1948 financial year will be not less than U.S.\$1 billion. Thus, pending direct financial aid from the United States, only continuation of currency output is available to meet the government deficit unless strong and realistic financial measures are introduced. Some indication of the inflationary trend in China is given in the following table of the black market exchange rates, which relate Chinese national dollar equivalents to United States dollars during 1947:

Black Market Exchange Rates

1947	U.S.\$1— C.N.\$	Increase compared with January 15 (=100)
January 15	6,500	100
February 1	7,750	115
February 14	14,000	201
April 26	22,000	338
May 7	37,000	570
June 9	35,000	538
July 30	42,000	646
August 1	44,000	677
August 15	42,000	646
September 1	46,000	708
September 15	47,000	723
October 1	61,000	938
October 15	89,000	1,385
November 1	84,000	1,292
November 15	97,000	1,492
December 1	139,000	2,138
December 15	153,000	2,370
December 30	156,000	2,400

As will be noted, the increase showed a rapid acceleration towards the end of the year under review, and it is impossible to predict future movements with any degree of precision. Changes in these rates have been spasmodic and violent, interspersed with periods of relative stability. As in the case of inflationary trends in other parts of the world, such movements are usually inspired by government reverses, either military or political, while the refusal of farmers to release foodstuffs for currency without a stable purchasing power causes increased speculation and hoarding of all commodities in short supply. This all reacts directly on the industrial life of the country.

Similarly, deterioration in the foreign exchange value of the Chinese national dollar is reflected in the movement of the general index of wholesale commodity prices, graphically reflected in the following table:



Shanghai—Wharf in front of the Customs House, one of the many fine buildings on The Bund, others in this photograph including the North China Daily News, Chartered Bank, Palace Hotel, Cathay Hotel and the tall Bank of China Building.

Photo by Paul Ellisheff

Index of Wholesale Commodity Prices

1947	Index	Increase compared with January (=100)
January	10,363	100
February	17,658	171
March	18,361	176
April	22,161	213
May	32,707	314
June	37,176	357
July	46,557	447
August	48,924	470
September	60,519	581
October	94,813	911
November	123,697	1,193
December 27	144,553	1,395

This upward movement of commodity prices, though stimulated in part by the establishment of rigid import restrictions, is considered by competent observers to have resulted largely from the lack of official price controls and rationing of supplies.

It will be noted from the foregoing tables that, during the year under review, the rate of increase in commodity prices has lagged behind the rate of currency inflation. In effect, the cost of commodities has actually fallen in terms of foreign currency. This cannot, however, be regarded as significant, since there is always a time lag, and commodity prices have not caught up with the unprecedented fall in black market exchange rates, which began during the latter part of the year.

Main Argentine Certified Seed Potato Needs Filled by Canada

Approximately 87 per cent of requirements for 1947-48 crop year supplied — Shipments from Canada totalled 689,461 crates to Argentina and 117,426 crates to Uruguay, constituting a record — Purchases valued at approximately \$3,000,000—Short crop in 1946-47 and late blight reason for large imports—Katahdin continues to be favoured variety.

By W. B. McCullough, Commercial Secretary (Agricultural Specialist),
Canadian Embassy

BUENOS AIRES, May 10, 1948.—Canada supplied Argentina with approximately 87 per cent of its certified seed potato requirements for the 1947-48 crop year, and virtually all Uruguay's imports for the summer crop planting were obtained from Canada. Shipments to Argentina totalled 689,461 crates and to Uruguay amounted to 117,426 crates, which constitutes a record. The value of these purchases is approximately \$3,000,000. Heavy importations by Argentina were occasioned by the short crop in 1946-47, resulting from an outbreak of late blight in the Rosario crop and a degree of degeneration in domestic seed.

Argentina was unable to obtain supplies of seed during the war years, due to shipping difficulties, and the supplies of new seed in 1946 were short. For the first time since 1939 this country had to import table potatoes, imports from August through November, 1947, amounting to 121,803 metric tons. These supplies were obtained mainly from the United States before the Canadian crop came on the market.

As a result of propitious weather conditions and a substantial acreage of imported seed, Argentina is harvesting a very good crop of potatoes this year. In the southern zone, centred around Mar del Plata-Balcarce, which produces the bulk of the semi-late or main crop, the area sown was officially estimated at 93,180 hectares, or 2.2 per cent above last year. While no official estimate is yet available on production, this zone is expected to produce upwards of 8,000,000 sixty-kilo sacks, which is about equal to the record crop for this area in 1941-42. The average yield for the zone is about 8 tons per hectare, but many growers report yields as high as 15 tons per hectare. The local market will in all probability be amply supplied with table potatoes this year, except during the usual seasonal shortage during September to October. No imports of table potatoes this season are anticipated.

Late Crop Plantings in Rosario Zone Decreased

The acreage planted to the "late crop", mainly in the Rosario zone, is down about 15 per cent from last year, this reduction being attributed to the good crop prospects in the southern zone, inclement weather and the high cost of domestic and imported seed. This is a table-stock zone, producing two crops a year. The "late crop", which is planted during the summer months when the soil is hot and frequently dry, is in any year something of a gamble. The production of this crop largely controls consumer prices in the city markets. When the prospects of this crop are large, growers in the southern zone, as well as in Rio Negro and Mendoza, are inclined to move their stock before prices decline. The current crop in Rosario shows considerable variation according to planting dates. Heavy rains during mid-January and early February interrupted planting and

caused considerable damage to some fields. The relatively early and late plantings show good growth. During the past two weeks late blight has appeared in varying degree throughout the Rosario zone and the outcome of this crop will largely depend on weather conditions during the remainder of the growing season. This crop is at a critical stage, and as wet, cool, humid weather is continuing, there is considerable anxiety concerning further development of late blight in this region.

Argentina had about 7,000 hectares under certification this season, with an estimated production of about 2.2 million bushels of first-generation certified seed. This figure does not represent all first-generation seed available this year, because imported seed moved to areas outside the seed zone and not all the plantings of the imported seed were entered for certification. Substantial quantities will be available for planting the next crop and, depending on the outcome of the Rosario crop, quantities of Argentine certified seed may be available to neighbouring countries, particularly Uruguay. This latter outlet has for some years been a source of encouragement for the certified-seed grower in Argentina, and a factor which enabled him to purchase a quantity of imported seed each year.

Potato Production Dropped Below Million Metric Tons

In the crop year 1946-47, potato production in Argentina dropped below a million metric tons for the first time since 1938-39. That figure is now generally accepted as the country's annual requirements. It is interesting to note that, following the virtual crop failure in 1936-37, Argentina imported substantial quantities of North American varieties of certified seed. Canada participated in the business and subsequently the Katahdin became the popular variety in Argentina, a position which today remains unchanged. Three years later, in 1941-42, Argentina had a record production of potatoes. Despite the fact that no seed was imported in the next two war years, this record was almost equalled in 1943-44. Production was maintained during the remainder of the war and until last year, when a severe outbreak of late blight in the Rosario zone ruined the late crop. Argentina was therefore short of table potatoes, and for the first time since 1939 local production was short of the country's requirements. The acreage planted to potatoes in 1947-48 is slightly under that of last year. Nevertheless, as a result of favourable growing conditions for the main crop in the Mar del Plata-Balcarce region and substantial imports of certified seed, total production is expected to be just over the million-ton mark. A statistical summary of Argentine potato production during recent years is shown in the following table:

Argentine Potato Production

Crop year	Area planted (hectares)	Yield per hectare*	Production (Metric tons)	Exports	Imports	
					Table	Seed
1936/37	119,381	3.345	219,805	3,183	124,019	6,872
1937/38	127,029	8.392	952,000	3,990	204,439	28,032
1938/39	141,570	6.718	850,188	8,685	28,002	28,677
1939/40	208,000	5.667	1,071,000	5,603	17,853	31,093
1940/41	241,800	5.742	1,053,000	34,526	Nil	12,964
1941/42	237,000	6.691	1,442,000	45,137	Nil	4,013
1942/43	205,200	5.729	1,031,740	31,994	Nil	11
1943/44	211,140	7.413	1,400,090	16,193	Nil	Nil
1944/45	209,020	5.511	1,026,620	25,293	Nil	Nil
1945/46	186,140	6.573	1,185,300	26,175	Nil	2,964
1946/47	171,780	....	814,040	....	Nil	12,445
1947/48	167,590	....	†	....	121,803	31,858

* Per hectare harvested.

† 1947/48 crop about 1,000,000 tons.



Argentina—Canadian certified seed potatoes being unloaded at Mar del Plata. Canada supplied Argentina with approximately 87 per cent of its certified seed potato requirements for the 1947-48 crop year. Shipments totalled 689,461 crates.

Katahdin Continues to be Popular Variety

By reason of its resistance to virus diseases, adaptability to Argentine conditions (more particularly for the two crop zones), good yields and pleasing market appearance, the Katahdin continues to be the popular variety in Argentina. It is firmly established in this market, and growers have in recent years associated imported certified seed with Canada. Under Argentine conditions, the dormancy period apparently shortens with each successive generation. As potatoes are stored out-of-doors in the Balcarce zone during a mild winter, all potatoes in storage sprout to some extent, but those of the third and fourth generation are usually sprouted excessively before planting.

This is the chief objection to this variety in the southern zone, but it is an ideal characteristic for the two crop areas. Imported seed of this variety has for many years been obtained from New Brunswick.

The White Rose variety is grown in the Balcarce zone, particularly to supply seed stock to the northern early zone, comprising the provinces of Salta, Jujuy and Tucumán. The temperatures in this area are relatively high and this variety gives more satisfactory results. This area supplies early potatoes to the Buenos Aires market, commencing in October and continuing, according to demand, through December. The comparatively small quantities of imported seed have been obtained from the west coast of the United States, and normally arrive early in October. Part of the seed requirements for this variety, for 1947-48, were imported from British Columbia. This shipment arrived in excellent condition, but did not reach Buenos Aires until the last of November, which was very late for planting. The yield from the Canadian stock was in most instances appreciably lower than that from the United States stock, which was planted about three or four weeks earlier. From the standpoint of disease the Canadian White Rose compared very favourably and the lower yield was attributed to the late planting, followed by a moderate dry period.

Certified Seed Imported for Foundation Stock

Argentina imports certified seed for foundation stock. Normally most of the fields planted with imported seed in the approved seed zone are entered for certification and supply good quality seed to other areas and for export to neighbouring countries. The demand for imported seed is largely dependent upon the returns the producer receives from the previous harvest. Canadian exporters, to maintain the dominant position in this market, must be prepared to keep abreast with quality competition, and in the near future may have to offer seed of Foundation A class. Argentina has passed the stage where she will buy just imported seed potatoes.

As is the case of most other countries, Argentina is critically short of United States dollars, which may be a limiting factor on the quantity purchased this year. In August, 1947, a decree prohibiting further exchange permits for seed potatoes was passed and is still in effect. The Ministry of Agriculture is now studying the country's requirements of imported seed potatoes for 1948-49 and, when the quantity is decided upon and approved, the Instituto Argentino para la Promoción del Intercambio (I.A.P.I.), a Government entity, will make the purchase. This will preclude private trading, which was permitted to some degree last year. It is quite probable that one or two officials of the Ministry of Agriculture will visit Canada again this year in connection with the purchase of Canadian seed. It is possible they will arrive in time to see the growing crop, and may make certain selections of stock. A factor that will have a considerable bearing on the quantity required will be the outturn of the late crop in the Rosario zone. Based on a fair crop in this zone, Argentina would probably absorb about 200,000 crates of imported seed. Approximately 80 per cent would be of the Katahdin variety, 15 per cent of the White Rose and 5 per cent of other varieties, mostly Sequoia. All purchases will be subject to the exchange situation.

Shipments in Veneer Crates Not Satisfactory

Part of the shipments to Argentina last year were made in veneer crates. It was only after some negotiations that these were accepted by I.A.P.I., and special care was taken in the stowage. Actually as a result of this extra care, there was no undue loss from breakage and spillage on arrival, but many crates lost their shape and were broken by the time they reached the farms. This pack is not entirely satisfactory for a shipload, when frequently insufficient dunnage is used, and the bottom tiers may be severely damaged. The veneer crates did not stand up to rough handling. The chief objection to this package last season was that it was too small and there was an appreciable shortage in net weight. All purchases by I.A.P.I. this season will specify the standard potato crate, which is the accepted pack for this country.

Turkey Plans Increased Power Production

The new hydro-electric project at Caglayan, on the Sakarya River 50 miles from Ankara, will supply 120 to 150 million kw. hours per year upon its completion, planned for 1952. Two dams, 110 and 150 feet high, will form lakes in the Sakarya River and one of its tributaries to retain 880 million cubic yards of water. Three units of 12,000 kw. each will comprise the power plant, housed 230 feet below the surface of the earth. Energy produced by this \$11 million project will be transmitted to Ankara and from there relayed to Kirikkale, a small industrial centre 35 miles farther away.

New Procedure Governs Visits of Foreign Businessmen to Bizonia

Repeated journeys over 30-day period now authorized, with extensions if necessary—Additional hotel reservations made available—Procedure for entry of Canadian businessmen outlined.

FRANKFURT, May 26, 1948.—(FTS)—Abolition of the quota system for the entry of foreign businessmen into the Bizonal Area has recently been announced by the Joint Export-Import Agency. Under the new procedure, anyone interested in trade with the Bizonal Area may now be admitted for repeated journeys over a period of thirty days. If additional time is required, the branch offices of the Joint Export-Import Agency have been authorized to grant the necessary extension.

Previously the number of businessmen admitted to the United States and United Kingdom zones was based on the extent to which the individual countries engaged in trade with the economically fused zones and upon the available accommodation. This plan has been abandoned in keeping with the plan of the two military governments for expanded trade with other countries. In a further effort to encourage the visits of businessmen, JEIA is adding new hotels to those already reserved for the exclusive use of foreign visitors.

Procedure for Entry Outlined

The procedure for entry of Canadian businessmen is as follows:

1. The Canadian visitor will obtain a "sponsorship" from the Department of Trade and Commerce. Such sponsorship will be considered a guarantee of the *bona fides* of the visitor and an indication that an import licence will be granted if a contract is concluded. Canadian businessmen should, therefore, first make certain that any goods they contemplate purchasing for export from Bizonia will be permitted importation into Canada.
2. The businessmen will then receive a Military Entry Permit from the Military Permit Officer. (MPO's are located in all the important European capitals and in Washington.)
3. Each applicant will have his passport stamped, indicating that he is entitled to use all facilities available to foreign businessmen in the Bizonal Area. He will receive a copy of the "Businessmen's Guide", published by the Joint Export-Import Agency, listing these facilities.
4. Complete freedom of travel will be allowed between the United States and British occupation zones.
5. In the British zone, visitors will pay for accommodation, transport, etc., in BAFSV's (British Armed Forces Special Vouchers), and in MPC's (Military Payment Certificates) in the United States zone.

Facilities for Payment by Visitors Provided

BAFSV's will be procured in Germany against special sterling letter of credit obtainable from the London Foreign Office (German Section), from the British MPO, or from the principal British consular representative in countries where there is no MPO. American Express dollar travellers' checks or MPC's will be accepted in exchange for BAFSV's. In the United States zone, MPC's will be issued in exchange for dollar instruments.

Forms of application for military permits may be obtained from the Area Trade Officer, Foreign Trade Service, Department of Trade and Commerce, Ottawa.

Britain Plans Greater Efficiency In Agricultural Production

Unfavourable economic and exchange conditions demand that production of foodstuffs be increased—Reduction in arable land resulted in greater dependence on imports of feeding-stuffs—Production targets set for 1951-52 with emphasis on products that will save most dollars.

By R. W. Blake, Assistant Commercial Secretary for Canada
(Agricultural Specialist)

LONDON, March 20, 1947.—Great efforts are being made to increase the efficiency of agriculture and to expand production of foodstuffs to a point never reached before in the history of British agriculture. This action is necessary due to the economic pressure of events, caused in part by the rapid dwindling and disappearance of Britain's overseas investments, visible and invisible, the adverse balance of payments with the dollar area and the inability to obtain cheap food from abroad, upon which this country used largely to feed itself.

Before 1850, Britain was practically self-sufficient in foodstuffs, except for a few products such as tea and sugar. The standard of production nearly kept pace with the increase in population during this period, due to the adoption of better farming methods, and increased yields resulting thereby, and the use of phosphates. On account of difficulties in transportation, however, supplies did not always reach the growing urban population in sufficient quantity, and malnutrition was prevalent in those days where numbers were most dense.

Reduction in Cultivated Area Results in Feedstuff Shortage

Then came the industrial revolution, and labour migrated from the farms into the higher-paid industries. This forced the farmer to reduce his cultivated land area, with its heavy demand on labour, and permanent pastures increased, with an accompanying expansion in numbers of livestock.

As a result of the increase in livestock population, with the decrease in arable land, the country became more dependent on imported feeding-stuffs, and it is the present overall shortage of feeding-stuffs which renders the problem of maintaining and expanding livestock production so difficult today.

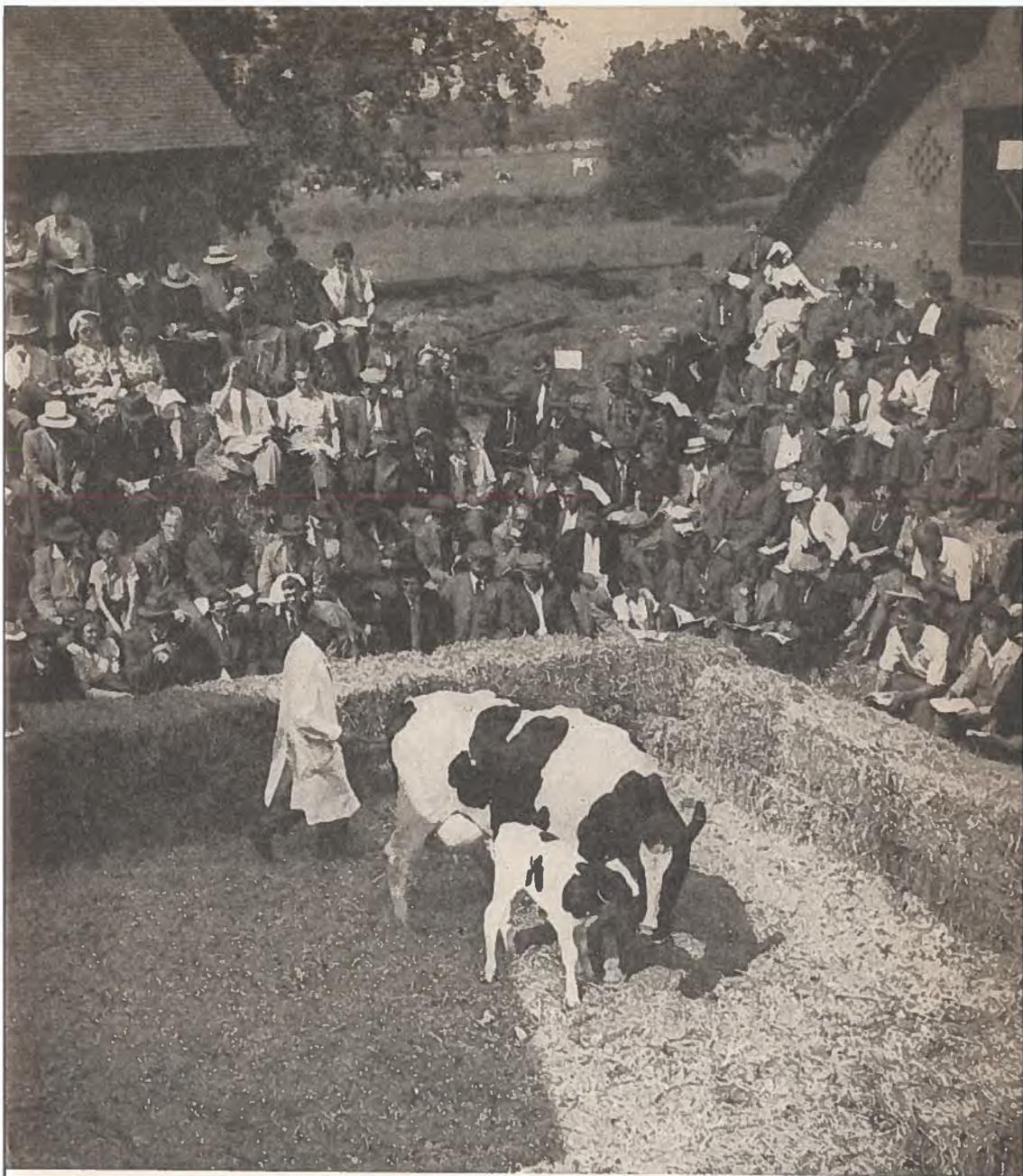
About 1875, agricultural products began to come into the country—wool from Australia and wheat from America—and Britain began to rely more and more on other countries for the major part of her food supplies.

She is still dependent on food supplies from abroad but, if the targets set out in the five-year expansion program introduced by the government last year are reached, or as hoped, exceeded, it will be possible to reduce the amounts needed from overseas.

Production Targets Set for 1951-52

In a statement to the House of Commons on August 6, 1947, on the economic crisis, the Prime Minister outlined the targets set for agriculture, as shown in the tables below.

The following figures show the levels of production for stock and crops to be achieved by 1951-52, expressed as percentages of prewar production and compared with output in the peak war year and in 1946-47.



United Kingdom—Canadian Holstein-Friesian heifer and calf in the auction ring at Kinnerton, Cheshire. Imports of dairy cattle are assisting British farmers to increase the production of dairy products.

Comparative Crop Production

	Prewar	1943-44	1946-47	1951-52
Wheat	100	209	119	160
Barley	100	215	257	279
Oats	100	158	150	156
Potatoes	100	202	209	129
Sugar beet	100	137	164	131

Comparative Livestock Production

	Prewar	1943-44	1946-47	1951-52
Milk	100	101	107	123
Eggs	100	61	78	152
Beef and veal	100	83	93	110
Mutton and lamb	100	79	70	77
Pig meat	100	37	32	92

The statement continued: "These figures, including those for products not specified, if translated into output available for sale and adjusted for requirements of imported feeding-stuffs, represent an expansion of 50 per cent as compared with prewar, of 15 per cent as compared with the wartime peak of 1943-44, and 20 per cent as compared with 1946-47."

Emphasis on Products That Will Save Most Dollars

As indicated in the foregoing tables, a uniform expansion for each product is not contemplated, but emphasis is being placed on those products calculated to save the most dollars.

The following figures, supplied by the Economics and Statistics Department of the Ministry of Agriculture, compare the agricultural output of foodstuffs in the United Kingdom for 1946-47 and prewar. The 1946-47 production has been computed as a percentage of the average 1936-37 to 1938-39 production. It was pointed out by the Economics and Statistics Department that the table shows a 5 per cent increase in value of gross output at fixed 1945-46 prices, not including output from gardens or allotments or any non-edible produce. If account is taken of non-edible produce, and particularly if allowance is made for a diminished import of feeding-stuffs, the picture is quite altered, and the increase in net output works out at 26 per cent.

Estimated Value, at 1945-46 Average Prices, of Agricultural and Horticultural Produce Sold Off Agricultural Holdings

	Average price	Average 1936-37 to 1938-39		1946-47	
	1945-46 £ per ton	Quantity (‘000 tons)	Value £’000	Quantity (‘000 tons)	Value £’000
Wheat	20.395	833	16,989	1,371	27,962
Barley	24.559	523	12,844	938	23,036
Oats	15.360	414	6,359	420	6,451
Mixed corn*	13.6	8	109	5	68
Rye	20.227	2	40	26	526
Pulse—beans	22.000	10	220	....	....
Potatoes	9.223	3,191	29,431	6,621	61,065
Sugar beet	4.108	2,741	11,260	4,522	18,576
Hops	405.0	13	5,265	14	5,670
Mustard for seed	74.0	11	814	9	666
Fruit:					
Orchard	41.71	386	16,100	651	27,153
Soft	87.731	66	5,790	53	4,650
Glasshouse	1776.667	1	1,777	1	1,777
Vegetables:					
Open	19.519	2,154	42,044	2,718	53,053
Glass, including glass frames	105.226	94	9,891	111	11,680
Total crops .....	....	....	158,933	....	242,333
Cattle	120.650	554	66,840	503	60,687
Calves	82.879	24	1,989	34	2,818
Sheep and lambs	174.067	195	33,943	140	24,369
Pigs:					
Not for bacon	100.955	171	17,263	15	1,514
For bacon	139.705	246	34,367	100	13,970
Stores (‘000 head)	2.707	155	420	145	392
Poultry for food	219.105	78	17,090	56	12,270
Store poultry (‘000 head)....	0.576	5,028	2,896	2,950	1,699
Rabbits and game	85.267	40	3,411	15	1,279
Total livestock .....	....	....	178,219	....	118,998

*Mixture of cereal grains, mostly barley and oats, used mainly for feeding purposes.

Estimated Value, at 1945-46 Average Prices, of Agricultural and Horticultural Produce Sold off Agricultural Holdings—Concluded

	Average price	Average 1936-37 to 1938-39		1946-47	
	1945-46 £ per ton	Quantity (’000 tons)	Value £’000	Quantity (’000 tons)	Value £’000
Milk, liquid and manufactured	23.744	6,256	148,542	7,424	176,275
Farm butter	186.667	24	4,480	8	1,493
Farm cheese	202.0	14	2,828	2	404
Farm cream .....	.....	6	1,840	.....	.....
Eggs	232.188	221	51,313	149	34,596
Total dairy produce .....	.....	.....	209,003	.....	212,768
Total livestock and dairy produce .....	.....	.....	387,222	.....	331,766
Grand total .....	.....	.....	546,155	.....	574,099

Arable Acreage Increased; Pasture Reduced

In 1939, out of a total 24.6 million acres under crops and grass (excluding 5.5 million acres rough grazing), 15.7 million acres were in permanent grass and 8.9 million acres arable land (6.8 million acres crops and fallow; 2.1 million acres clover and rotation grasses). In 1944 the arable land had increased by over 50 per cent and, out of 24.3 million acres (excluding the same amount for rough grazing), 9.7 million acres were in permanent grass and 14.6 million acres were arable (11.6 million acres crops and fallow; 3 million acres clover and rotation grasses).

The new program encourages this Ley system of farming, whereby more of the land is devoted to crops and temporary grass and less to permanent grass, by offering a subsidy of £4 per acre for ploughing up grassland three years old or over. This subsidy will be in effect for land ploughed up between August 21, 1947, and December 31, 1949, and sown to approved crops or re-sown to an approved grass mixture.

To increase the home-grown supplies of feeding-stuffs required, in conjunction with the quantities expected from abroad, for the maintenance of the larger numbers of livestock provided for in the program, plans have been made for substantially expanding and improving the conservation of grass for winter use, and financial assistance will be provided for this purpose. It is also expected that larger supplies of silage, dried grass and home-grown linseed cake will be available. To obtain this latter product, it is hoped to add to the crop area 400,000 acres of linseed, most of the seed for which will be purchased in Canada.

Interest in Gardens and Allotments Encouraged

With regard to the amount of food grown on gardens and allotments, a Ministry of Agriculture press notice, issued on February 4, entitled "Food from Allotments and Gardens", includes the following information:

"In the peak year 1942 there were some 1,450,000 allotments under cultivation, and many gardens were turned over to vegetables, at least in part. An estimate of domestic production in that year put the total at about 500,000 tons of potatoes and over 1,000,000 tons of other vegetables. At the present time the number of cultivated allotments is approximately 1,100,000."

Every effort is being made, by appeals through the press and over the radio, to make the public more allotment minded, in an effort to increase the number of allotments under cultivation.

The government's Economic Survey for 1948, recently issued as a White Paper, gives the latest estimates of supplies expected to move into consumption in the United Kingdom during the first half of 1948, as indicated in the following table:

Food Consumption in Great Britain

	Prewar annual average	1947	Jan.-June 1948
	(Pounds per head per annum)		
Dairy products (milk solids).....	38.3	48.9	45.7
Meat (edible weight).....	109.6	82.2	67.2
Fish, game, poultry, etc. (edible weight).....	32.8	36.1	33.8
Eggs and egg products (shell egg equivalent).....	24.5	21.0	22.5
Oils and fats (fat content).....	45.0	33.9	34.6
Sugar and syrup (sugar content).....	109.9	85.0	76.1
Potatoes.....	176.0	297.0	176.4
Pulses and nuts.....	9.6	7.8	5.8
Tomatoes and fruit (fresh equivalent).....	141.5	126.6	108.0
Vegetables.....	107.4	117.9	81.9
Grain products.....	209.8	240.9	247.5
Beverages.....	14.7	15.2	14.5

The White Paper goes on to say that "translated into nutritional terms, the supplies shown in the table above would be equivalent to a daily intake as follows":

Food Consumption in Great Britain

(Daily intake)

	Prewar annual average	1947	Jan.-June 1948
	(Figures in grams)		
Protein:			
Animal.....	42.7	43.0	38.4
Vegetable.....	37.2	43.4	40.2
Total.....	79.9	86.4	78.6
Fat (from all sources).....	130.2	105.5	99.8
Visible fat (butter, margarine, lard, etc., fat content)	56.2	42.3	43.1
		(Figures in calories)	
Total energy value.....	3,000	2,880	2,681

The foregoing is a review of domestic production as achieved by Great Britain until the year 1947, and of the challenge with which the agricultural industry is now confronted, a challenge bolstered with stabilized prices and subsidies, but one which will require the utmost effort on the part of those concerned to meet it successfully and to reach, or, better still, to exceed the targets set.

The Minister of Agriculture, in speeches at farmers meetings and in radio talks, has reiterated his confidence in the farming community to measure up to the task set before them.

Egypt May Buy More Swedish Timber

Egypt is negotiating with Sweden for supplies of wood in excess of the annual quota reserved against Egyptian cotton. Sweden is exporting her surplus timber on the basis of the needs of war-damaged countries, rather than on a commercial basis. Any stocks remaining are then allocated according to the prewar imports of the country in question.

Turkey Planning Trade Fair

Canadian manufacturers and producers have been invited by the Government of Turkey to participate in the Izmir International Fair, being held from August 20 to September 20, 1948. Information concerning this fair may be obtained from the Commercial Counsellor for Turkey, 50 Rockefeller Plaza, New York City, or by writing to Sait Belgun, 4 cu Vakif Han ici Kat No. 32, Posta Kutusu 78, Istanbul, Turkey.

Brunei's Foreign Trade Involves Transshipment at Nearby Ports

Canadian products normally reach this market through exporters' agents or buyers in Singapore—Principal items imported from Canada maintain their prewar importance—Natural resources substantial and valuable—Production of rubber approaching prewar level.

By Paul Sykes, Canadian Government Trade Commissioner

(Brunei's monetary unit is the Straits (or Malayan) dollar, which is approximately equal to Can.\$0.47.)

SINGAPORE, April 15, 1948.—Brunei's foreign trade is based to a large extent on transshipments at Singapore or at ports in Sarawak or North Borneo. Goods are seldom imported directly into the state, except perhaps in the case of some oilfield supplies or government stores. Statistics of imports from specified countries of origin are nevertheless available, as are records of shipments consigned to various overseas markets.

Such import and export trade is generally in the hands of: (1) the crown agents in London, for state requirements; (2) the Shell Company of S.S. Limited, for oilfield and other requirements of the British Malayan Petroleum Company Limited and their staff; (3) British, Chinese and other merchant firms in Singapore, for requirements of subsidiaries and dealers in a wide range of industrial, trade and other goods going into consumption through retail channels; and (4) several departmental stores in Singapore, who sell directly to individual accounts by the mail order system.

Canadian exporters will appreciate, therefore, that there is virtually no possibility of arranging direct business with Brunei any more, in fact, than with North Borneo or Sarawak. Such Canadian goods as reach the market will normally do so through exporters' agents or buyers in Singapore. In this connection, active and experienced agents in Singapore can be relied on to cover Brunei and the other two British Borneo colonies in exactly the same way as they normally attend to the distribution of their principals' products throughout Malaya.

Trade Balance Unfavourable

Official records of Brunei's trade show a value for combined imports and exports in 1940 and 1941 of S\$13,400,000 and S\$9,400,000 respectively. It is noteworthy that the comparative figure for July-December, 1946, despite, on the one hand, increased commodity prices and, on the other, the more serious shortage of essential materials, amounted to S\$4,100,000. Of this amount, imports made up S\$3,200,000 and exports accounted for S\$900,000, the balance obviously being associated with an urgent trend towards rehabilitation and inability to regain prewar productive capacity.

As compared with 1941, imports by commodity classifications showed large increases in the values of machinery, flour, tobacco, motor vehicles and cement, and declines, owing to world shortages, for rice, miscellaneous manufactures, provisions and cotton goods. Export records are vitiated by the lack of accurate data regarding the quantities of oil and natural gas sent to Sarawak and are accordingly of value only in so far as they show the value of rubber shipments amounting to S\$781,000, a highly creditable value for six months' trade compared with a total of S\$1,760,000 for 1941.

Canada's Trading Position Little Changed from Prewar

Canada's position as a supplier of various of Brunei's import requirements is shown with commendable regard for detail in the state's records of import trade by countries of origin. It appears that, in the case of canned goods, motor vehicles and flour, Canadian supplies accounted for substantial part of total 1946 imports in the same way that they did prior to the war. This fact will bear out the suggestion given above that Canadian exporters who are satisfactorily represented in Singapore can have the assurance that their goods will be efficiently distributed in Brunei as in the other British Borneo colonies.

Brunei's import tariff is similar to that of the Colony of North Borneo. It provides for the collection of some ad valorem and some specific duties on a limited range of goods, also for the extension of preferential rates of duty to some goods of Empire origin. The tariff also provides for the imposition of export duties on a variety of timber and forest produce, livestock and several types of agricultural products.

Brunei Not a Well-known Market

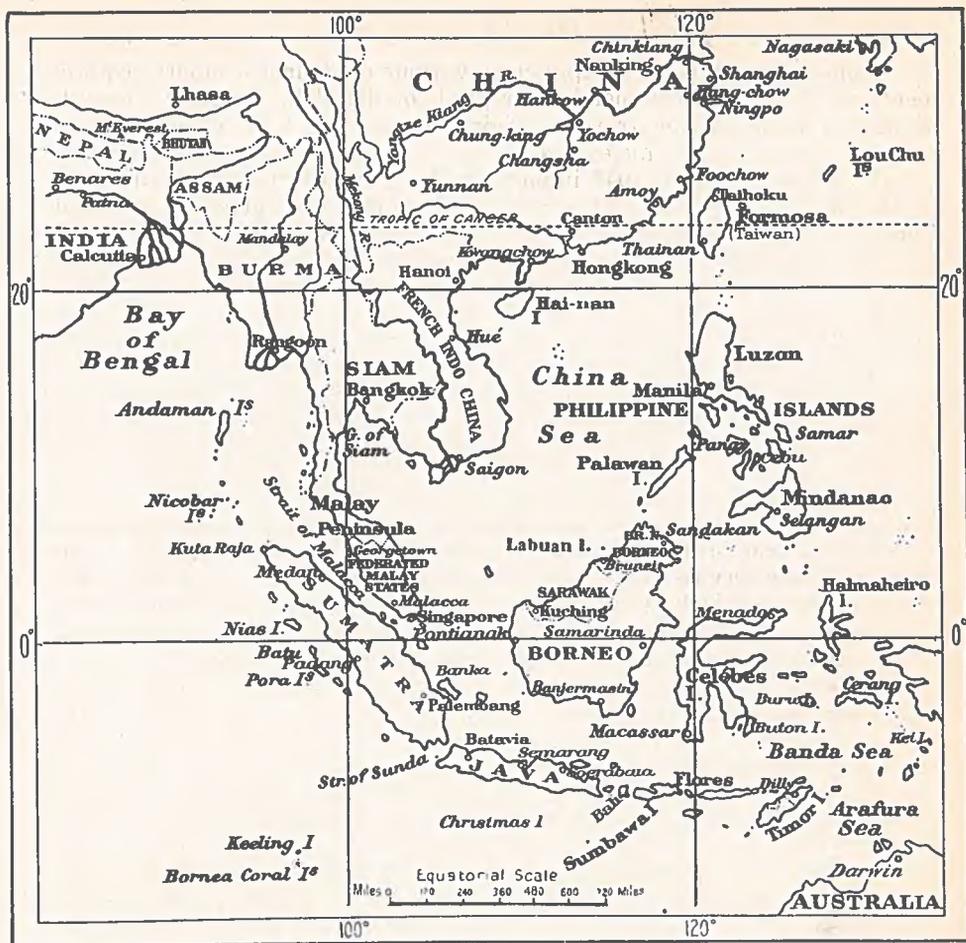
Brunei, one of the markets covered by the Singapore office of the Foreign Trade Service, is probably less well known in Canada than is any other country regularly listed in *Foreign Trade* among trade commissioners' territories. This comparatively small part of the jointly British- and Dutch-owned island of Borneo is an independent state within the British colonial empire, governed by its own Sultan, with the advice of a British Resident. As a colonial territory it comes under the jurisdiction of the Governor General of Singapore and the Federation of Malaya, who is also the King's representative in the colonies of North Borneo and Sarawak.

Geographically Brunei lies on the northwest corner of Borneo, bounded on one side for about 100 miles by the sea and otherwise by the land area of the Colony of Sarawak. It has an area of some 2,226 square miles and supports a population of some 38,000. The capital town, of the same name as the state itself, accounts for the major share of 14,000. There is only one other town of any size, Kuala Belait, situated at the southern extremity on the coast, with a population of about 12,000. The population is predominantly Malay, with smaller numbers of Kedayans, Tutongs, Dusuns, and Chinese. They are mainly Mohammedans in religion, and Malay is the most common language.

Natural Resources Substantial and Valuable

Although small in area, Brunei possesses considerable natural resources. Agriculture has always been the main occupation of the population, the principal crops being rubber (locally described as an agricultural product), rice and sago. Incidental production comprises tapioca, pineapples, bananas, sugar and tobacco. Forest production has never reached beyond an elementary stage, but valuable stands have been surveyed, and almost 30 per cent of the total area of the state has been set aside as protected forest reserves. There are fisheries along the coast, but these are concerned mainly with meeting local demand.

It is on account of its mineral resources that Brunei is of particular interest. It has been known for many years that there was oil in the country, but it was not until 1931 that production was undertaken on a commercial scale at Seria, some ten miles northeast of Kuala Belait. The field is a valuable one and has produced substantial quantities of both oil and natural gas, which are carried by pipelines to the British Malayan Petroleum Company's refinery at Lutong in Sarawak. Various coal



deposits are also known to exist throughout Brunei, and they have been worked spasmodically. However, none of them is in operation at the present time.

Rubber Production Approaching Prewar Level

Rubber production in 1940 and 1941 ranged from 2,200 to 2,300 tons in each year and, despite the damage and deterioration suffered by most estates during the occupation, the output in July-December, 1946, was estimated at the creditable figure of 872 tons. It thus appears probable that the industry will shortly attain or exceed its prewar output. There are no estimates available of postwar rice crops, but they are known to have been below normal. Efforts to encourage increased production and to improve technique are expected to produce favourable results in the early future. The sago crop has increased to compensate for the shortage of rice. In general, as illustrated by trade statistics, the state is still short of foodstuffs but is improving its position, which should shortly be more or less normal.

Forest production has been extended to the utmost to cope with an abnormal demand for material for repairs and new construction. For the last six months of 1946 it amounted to some 372,000 cubic feet, mostly

timber and poles, a large increase over prewar output. The state will still have to import considerable supplies of timber during the next few years for use in permanent construction.

Oil Output Satisfactory

Prewar output from the Seria oilfield reached a maximum level in 1940, when 855,499 tons of oil and 5,172,000,000 cubic feet of natural gas were produced. Despite serious damage to wells and equipment, the output for 1946 was set at 285,496 tons of oil and approximately 1,000,000,000 cubic feet of natural gas. The rehabilitation of many wells and development of others promises well for future operations.

No data are available regarding the output of the coastal fisheries, although it is known that limited quantities of dried prawns were exported.

The output of cutch, a typical Borneo product made from mangrove bark and used by tanning industries throughout the world, was negligible, owing to the wartime destruction of the only factory producing this commodity. However, it is expected to resume production fairly shortly.

In addition to the foregoing branches of industrial production, Brunei also supports a number of cottage industries engaged in metal-working and the production of various matting and textile goods. Metal manufactures include silverware, jewellery, and a variety of goods made of brass. The export of such articles has again been resumed, although raw materials are in very short supply. The output of matting goods has also been resumed, but the weaving of textiles is being retarded by the lack of thread.

Transportation Services Limited

Brunei has several ports along its fairly extensive coastline, but most of them can only accommodate vessels of fairly shallow draught. Brunei, a river port, is accessible to ships of small size drawing no more than 12 feet. Larger or more heavily laden vessels must anchor outside a barrier some miles distant. The subsidiary ports of Muara, Kuala Belait, Tutong and Bangar are even more difficult of access, owing to the existence of bars and strong tides. Accordingly, only small vessels can use these ports.

The state has practically no roads or railways excepting a sketchy system joining the oilfields with nearby settlements, nor has it, at present, any facilities for air transport. Transportation facilities are accordingly limited to the shipping services calling at the main ports.

Belgian Congo to Pool Cement Imports

Leopoldville, May 25, 1948.—(FTS)—The continued expansion in the construction industry in the Belgian Congo has seriously increased the shortage of cement which has been felt for some time. With a view to improving the situation, the two local cement manufacturers have decided to import cement from Belgium. In order to put this product on the market at a reasonable price, a "pool" has been formed consisting of both the imported and the locally produced cement.

The Transport Co-ordination Committee of the Colony has introduced new tariffs in favour of cement. However, due to heavy goods traffic on the rail and river transportation systems of the Congo, arrangements have been made so that part of the imported cement for the east of the Colony will be shipped by rail from Lobito, in Angola, to Elizabethville.

As a result of these measures, the two companies are expected to import via Matadi and Lobito about 3,000 tons per month. The pool price will be maintained as long as the present shortage exists.

Marked Increase in Australian Production of Canned Fruits

Output in 1947 totalled 2,702,959 cases as against 2,008,330 cases in preceding year—Canned peaches accounted for 1,474,100 cases—Exports recover from wartime slump—Distribution and exports subject to measure of control—Shipments to Canada resumed.

By F. W. Fraser, Canadian Government Trade Commissioner

MELBOURNE, May 20, 1948.—Following the 1945-46 pack, the lightest for more than ten years, Australian production of canned fruits in 1946-47 rose to 2,702,959 cases of two-dozen 30-ounce cans as compared with 2,008,330 cases for the previous year. Canned peaches accounted for 1,474,100 cases, and there were 817,567 cases of pears, 272,275 of apricots, 61,471 composite pack, and 77,546 cases of pineapples.

Exports, which virtually ceased during the war, dropping to 56,000 cases in 1943, rose sharply following the cessation of hostilities, and in 1947 reached a total of 1,667,310 cases.

The Commonwealth Government continued to exercise a measure of control over the industry in respect of distribution and exports, in order to ensure that certain defined quotas would be made available for overseas markets, particularly Great Britain. Of the 1947 pack, 1,500,000 cases were allocated to Britain at the following prices (British currency), less one-half per cent allowance, for standard export grade per dozen 30-ounce cans on a c.i.f. United Kingdom port basis: Apricots, 12s. 4½d.; peaches, 12s. 1½d.; pears, 12s. 10½d.; pineapples (choice grade), 13s. 9d.

For the New Zealand market the allocation was 100,000 cases, but there was no specific allocation from the 1946-47 season's pack for general export markets, it being left to the canners to decide what proportion of the unallocated balance should be exported or reserved for the domestic market.

Limited Supplies for Canadian Market

Referring to the Canadian market, the chairman of the Canned Fruits Board, stated in his annual report for 1946-47: "Limited supplies of canned apricots and canned peaches will go forward to Canada from the current season's pack. These will be of standard export quality, suitably labelled to comply with the Canadian import regulations. The Canadian market was one of some importance to Australian interests prior to the war and, with a return to normalcy in cannery output of canned fruits, it is expected that greater attention than has been possible in recent years will be given to the re-establishment of Australian brands on this market next season."

The Australian domestic market, which in 1939 absorbed 1,261,877 cases of canned fruits of local production, was allotted only 745,000 cases in 1946 and an estimated 900,000 cases in 1947.

United Kingdom Chief Purchaser of Jams and Jellies

Australian production of jams and jellies, which was approximately 85 million pounds in 1938-39, were given great impetus during the war, output at one stage (1943-44) being virtually doubled. Total production in 1946-47 amounted to about 159 million pounds, of which 65.5 million pounds were exported. Of this amount, 30 million pounds were bought by the United Kingdom, other purchasers being: Malaya, 8.4 million pounds; British India, 3.5 million; Egypt, 3.75 million; Iraq, 3

million; Eire, 2 million; Hong Kong, 1.8 million; Palestine, 1.5 million; China, 1.25 million; Japan, 1.28 million; and Ceylon, 1.1 million. Many other countries imported lesser and varying quantities.

Exports to United States in May Establish Peacetime Record

Shipments valued at \$114.7 million were highest in any month since May, 1945—Aggregate for first five months of this year also larger—Upward trend in exports to the United Kingdom—Value of exports to Latin American countries, Australia, New Zealand, British West Indies and South Africa in last five months is lower.

CANADIAN exports to the United States in May were valued at \$114.7 million, which is the highest figure since the corresponding month in 1945, and the largest peacetime total on record. Exports in May, 1947, were valued at only \$79.8 million, and in the corresponding month for the previous year at \$72.2 million. The aggregate figure for the first five months of the current calendar year is \$536.3 million, which compares with \$400.0 million for the same period last year, and with only \$98.0 million for the corresponding five months of 1938.

Merchandise exports to all countries in May continued gains made in the previous months of this year over 1947, being valued at \$282.3 million, compared with \$267.8 million in May of last year. The aggregate for the first five months of 1948 is \$1,166.6 million against \$1,055.8 million in the same period of last year, and with exports for the corresponding period of 1938 of \$321.1 million.

Continuing the upward trend in exports to the United Kingdom, shipments in May were valued at \$85.1 million, though this figure is below that of \$90.5 million in the corresponding month last year. The aggregate for the first five months of 1948 is \$305.2 million, as against \$276.4 million in the corresponding period last year.

Exports to the Latin American group of countries increased in May to \$13.2 million, compared with \$10.2 million in May, 1947, reversing the trend of preceding months this year, the largest gains being in shipments to Argentina, Mexico, Uruguay, and Venezuela. On the other hand, the value of exports to European countries declined to \$30.7 million, compared with \$37.9 million last year, making the aggregate for the five months \$120.9 million, as against \$131.3 million in 1947. Lower figures were also recorded for shipments to Australia, New Zealand, the British West Indies and British Guiana, while those to the Union of South Africa were higher.

Values of exports to leading markets next to the United States and the United Kingdom, with figures for May last year in brackets (thousands omitted), were as follows: Trinidad and Tobago, \$1,425 (\$3,760); Jamaica, \$1,796 (\$3,092); Union of South Africa, \$7,815 (\$4,887); India and Pakistan, \$2,260 (\$4,435); Australia, \$3,216 (\$5,231); New Zealand, \$1,838 (\$4,917); Argentina, \$3,231 (\$2,011); Mexico, \$2,210 (\$902); Venezuela \$1,417 (\$1,161); Czechoslovakia, \$2,245 (\$665); France, \$6,541 (\$9,922); Italy, \$2,891 (\$6,448).

Among the commodity groups, substantial gains were shown in exports of animals and animal products, non-ferrous metals and products, and wood, wood products and paper, while shipments of agricultural and vegetable products and iron and iron products showed largest decreases. Other groups, except fibres, textiles and products, were moderately higher.

Canadian Exports, by Areas

NOTE: Throughout this bulletin, totals represent unrounded figures, hence may vary slightly from rounded amounts.

GEOGRAPHIC AREAS	May			January-May		
	1938	1947	1948	1938	1947	1948
BRITISH COUNTRIES						
(Millions of Dollars)						
United Kingdom and Europe.....	28.1	92.6	86.3	137.5	282.3	309.5
America.....	2.1	17.0	11.6	8.0	50.0	44.4
Africa.....	1.5	6.4	8.6	7.8	37.0	32.2
Asia.....	0.8	6.1	4.4	4.0	21.5	17.3
Oceania.....	3.5	10.2	5.2	19.6	34.8	20.4
Total British Countries.....	36.1	132.2	116.0	177.0	425.6	423.8
FOREIGN COUNTRIES						
United States and Possessions.....	20.5	80.5	115.4	98.6	402.7	538.6
Latin America.....	1.7	10.2	13.2	7.7	55.1	48.3
Europe.....	5.8	37.9	30.7	22.3	131.3	120.9
Other Foreign.....	2.9	7.0	6.9	15.5	41.2	35.0
Total Foreign Countries.....	30.9	135.6	166.3	144.1	630.2	742.8
TOTAL DOMESTIC EXPORTS.....	67.0	267.8	282.3	321.1	1,055.8	1,166.9

Canadian Exports, by Countries

Country	May			January-May		
	1938	1947	1948	1938	1947	1948
BRITISH COUNTRIES						
(Thousands of Dollars)						
Europe:						
United Kingdom.....	27,889	90,481	85,058	135,332	276,444	305,201
Eire.....	217	1,714	1,177	1,989	3,659	3,749
Gibraltar.....	1	32	2	2	168	3
Malta.....	21	354	52	189	2,028	548
Total Europe.....	28,128	92,581	86,289	137,512	282,299	309,501
America:						
Newfoundland.....	725	5,288	5,168	2,504	16,977	18,537
Bermuda.....	155	729	429	528	2,050	1,839
Barbados.....	82	1,217	659	385	3,438	2,192
Jamaica.....	476	3,092	1,796	1,818	7,414	6,934
Trinidad and Tobago.....	329	3,760	1,425	1,392	11,018	6,668
Bahamas.....	163	350	463	766	1,521	1,891
Leeward and Windward Islands.....	37	989	672	766	2,910	2,333
British Honduras.....	37	165	47	107	609	324
British Guiana.....	132	1,377	896	542	4,109	3,651
Falkland Islands.....	.....	.....	.....	.....	.....	.....
Total America.....	2,099	16,967	11,555	8,042	50,046	44,369
Africa:						
Northern Rhodesia.....	1,301	2	30	6,516	134	146
Union of South Africa.....	4,887	7,815	1	30,689	6	27,473
Other British South Africa.....	.....	.....	.....	.....	.....	.....
Southern Rhodesia.....	108	661	87	574	2,147	1,006
Gambia.....	2	29	.....	10	47	19
Gold Coast.....	26	48	116	43	447	764
Nigeria.....	7	364	117	30	1,383	406
Sierra Leone.....	24	17	45	86	370	499
Other British West Africa.....	.....	.....	.....	.....	.....	.....
British Sudan.....	3	36	9	190	210	37
British East Africa.....	66	351	336	361	1,548	1,874
Total Africa.....	1,537	6,395	8,556	7,810	36,983	32,224

Canadian Exports, by Countries—Continued

Country	May			January-May		
	1938	1947	1948	1938	1947	1948
(Thousands of Dollars)						
BRITISH COUNTRIES—Con.						
Asia:						
India.....	248	4,435	2,231	1,336	12,242	8,444
Pakistan.....			29			137
Burma*.....	33	82		79	464	
Ceylon.....	28	461	235	96	1,135	787
Aden.....	7	68	207	46	359	440
Malaya and Singapore.....	222	407	925	1,330	2,544	3,509
Other British East Indies.....	1		8	3	9	8
Hong Kong.....	241	455	536	1,099	2,244	3,144
Palestine.....	6	226	217	36	2,478	829
Total Asia.....	786	6,134	4,388	4,025	21,475	17,298
Oceania:						
Australia.....	2,486	5,231	3,216	13,207	24,348	12,985
New Zealand.....	1,000	4,917	1,838	6,213	10,173	7,027
Fiji.....	15	12	130	157	242	390
Other Oceania.....	1		31	42	9	38
Total Oceania.....	3,502	10,160	5,215	19,619	34,772	20,440
TOTAL BRITISH COUNTRIES	36,052	132,237	116,004	177,010	425,573	423,833
FOREIGN COUNTRIES						
United States and Possessions:						
United States.....	20,441	79,769	114,711	97,960	400,007	536,264
Alaska.....	7	14	26	39	162	92
American Virgin Islands.....	3	4	11	12	52	52
Guam.....		11	17	3	38	142
Hawaii.....	73	327	504	460	1,190	1,375
Puerto Rico.....	18	378	148	103	1,209	674
Total United States and Possessions.....	20,542	80,503	115,417	98,577	402,658	538,599
Latin America:						
Argentina.....	493	2,011	3,231	1,840	14,988	8,667
Bolivia.....	7	39	76	39	264	374
Brazil.....	470	2,347	2,387	1,635	10,027	8,955
Chile.....	68	425	335	303	1,918	1,207
Colombia.....	80	1,061	543	428	4,951	4,200
Costa Rica.....	14	152	91	48	901	407
Cuba.....	52	509	843	397	2,688	4,250
Dominican Republic.....	4	109	61	19	955	368
Ecuador.....	13	147	165	53	968	623
Guatemala.....	7	189	109	39	779	639
Haiti.....	33	88	84	89	340	261
Honduras.....	142	902	2,210	1,252	4,675	7,118
Mexico.....	3	55	56	49	290	253
Nicaragua.....	36	162	224	158	905	1,002
Panama.....	2	35	10	5	86	49
Paraguay.....	78	261	204	396	2,295	1,116
Peru.....	3	69	80	19	334	458
Salvador.....	8	152	315	228	773	972
Uruguay.....	10	304	785	111	1,228	1,415
Venezuela.....	143	1,161	1,417	621	5,690	5,940
Total Latin America.....	1,666	10,178	13,226	7,729	55,055	48,274
Europe:						
Albania.....		110	1	5	248	30
Austria.....		758	340	8	1,486	2,277
Belgium.....	559	4,937	1,946	2,060	13,850	13,285
Bulgaria.....	3			6	12	93

*See Foreign Countries from January 1, 1948.

Canadian Exports, by Countries—Concluded

Country	May			January-May		
	1938	1947	1948	1938	1947	1948
FOREIGN COUNTRIES—Con.						
(Thousands of Dollars)						
Europe—Con.						
Czechoslovakia.....	327	665	2,245	938	4,038	8,429
Denmark.....	43	242	328	186	907	1,362
Estonia.....				1		
Finland.....	26	31	309	129	329	1,339
France.....	670	9,922	6,541	3,368	32,036	26,095
Germany.....	1,345	712	2,387	5,133	3,092	5,328
Greece.....	208	365	787	398	3,099	5,653
Hungary.....		92	11	1	636	422
Iceland.....	4	410	351	6	1,274	1,182
Italy.....	116	6,448	2,891	591	15,117	12,492
Latvia.....	94			152		
Lithuania.....	66			67		
Netherlands.....	721	7,021	5,081	3,349	22,318	17,449
Norway.....	944	1,791	2,976	2,947	7,264	8,764
Poland.....	56	247	259	425	5,364	2,164
Portugal.....	14	320	279	63	1,749	1,039
Azores and Madeira.....		86		1	182	63
Roumania.....	2		35	22	20	152
Soviet Union.....	143	3	25	531	4,320	82
Spain.....		300	129	19	633	351
Sweden.....	422	1,162	1,578	1,639	5,954	4,120
Switzerland.....	66	1,939	2,039	267	3,974	8,106
Yugoslavia.....	1	342	156	4	3,404	641
Total Europe.....	5,830	37,903	30,694	22,316	131,296	120,927
Other Foreign Countries:						
Abyssinia.....			16		39	37
Afghanistan.....		5	8		33	24
Belgian Congo.....	6	117	213	44	522	755
Burma*.....			9			87
China.....	223	2,926	2,676	1,065	16,245	14,526
Greenland.....					56	23
Egypt.....	54	824	15	141	5,674	3,218
French Africa.....	221	371	142	263	1,084	1,482
French East Indies.....	3	17	20	11	571	253
French Guiana.....	2	114	26	3	129	82
French Oceania.....	4	6	12	39	48	24
French West Indies.....	12	278	183	60	711	496
Madagascar.....	1	37	8	4	42	341
St. Pierre and Miquelon.....	20	96	151	66	325	462
Iraq.....	3	55	170	24	1,249	642
Tripoli.....					5	1
Other Italian Africa.....					7	
Japan.....	1,175	25	371	9,789	409	1,690
Korea.....		4			20	10
Liberia.....	4	9	20	12	69	54
Morocco.....	5	23	72	39	595	415
Netherlands East Indies.....	87	469	827	325	2,792	2,865
Netherlands Guiana.....	2	152	59	15	310	322
Netherlands West Indies.....	21	107	294	90	568	1,000
Iran.....		31	40	38	216	223
Philippine Islands.....	132	844	287	684	7,093	3,143
Portuguese Africa.....	179	146	1,045	823	883	1,863
Portuguese Asia.....		1	1		46	39
Siam.....	2	40	81	9	216	187
Canary Islands.....		8			43	12
Spanish Africa.....			2		53	41
Syria.....	3	214	43	27	509	161
Turkey.....	746	65	151	1,903	646	529
Total Other Foreign.....	2,905	6,984	6,942	15,474	41,208	35,007
TOTAL FOREIGN COUNTRIES.....	30,946	135,570	166,280	144,096	630,214	742,806
TOTAL DOMESTIC EXPORTS.....	66,998	267,807	282,283	321,106	1,055,788	1,166,642

*See British Countries prior to 1948.

Rice Crop in British Guiana Greatly Reduced by Unseasonable Rains

Most seriously affected by poor growing conditions present crop will be some 5,000 tons below expectations—Fall crop endangered—Shortage of beef and milk as pastures drowned—Exports in first quarter indicate unfavourable balance of \$1,841,459.

By A. W. Evans, Acting Canadian Trade Commissioner

PORT OF SPAIN, June 4, 1948.—Unseasonable rains in British Guiana are responsible for a substantial reduction in the spring rice crop, and will seriously affect the fall rice crop if they should continue. Pastures have also been drowned, causing a shortage of beef and milk. The sugar crop has been similarly affected, and will be smaller than was formerly estimated. These conditions have influenced general business activity in the Colony. Exports for the first quarter of the current calendar year are valued at \$7,756,066, and imports at \$9,597,525, producing an unfavourable trade balance of \$1,841,459.

As a result of the drop in production of foodstuffs, allocations of scarce dollars have had to be made to import foodstuffs from Canada and, to a minor extent, the United States. Increased amounts of flour and milk are being brought in from these sources. Frozen beef has been ordered from Australia, a rare occurrence, as supplies of fresh beef are usually sufficient to supply local demand. Retail trade has slackened to an appreciable extent, as depleted stocks cannot be replaced, due to import restrictions and a decrease in purchasing power.

Offsetting to some extent the disappointing crops is large-scale exploration being undertaken by mining interests and the discovery for the first time of a body of gold ore in sufficient quantities to justify the sinking of a shaft rather than the former methods of placer and hydraulic mining. Bauxite is being exported in greater volume than last year.

Rice Crop Most Seriously Affected by Poor Growing Conditions

The rice crop has been the most seriously affected by the poor growing conditions. Indications are that the present crop will be some 5,000 tons less than anticipated. Difficulties are being encountered in planting the autumn crop, as many areas are completely flooded. However, much has been done to mechanize production and to increase the area under cultivation so that, with a break in the weather, the next harvest should be a bumper one.

The sugar crop, although reduced by bad weather, has been hindered by strikes among the cane cutters. The young ratoons which mature in October are reported to be doing well. Timber operations have been unfortunately hindered by the rainfall. Demand still exceeds supply. Production of gold for the first quarter of this year dropped substantially from that of the preceding year, while production of diamonds was somewhat above that of last year.

Wages of government employees and sugar workers have been increased, which has helped, to a certain extent, to sustain purchasing power. Labour conditions have been fairly good except for a transport strike of short duration and sporadic stoppages of work by the sugar workers.

Canadian Trade with British South Africa

Imports (Twelve months ended)

Country	April					
	Average 1935-39		1947		1948	
	Value \$ '000	Per cent	Value \$ '000	Per cent	Value \$ '000	Per cent
Northern Rhodesia					28	0.6
Union of South Africa			5,297	98.3	4,456	94.9
Other British South Africa					*	
Southern Rhodesia			90	1.7	208	4.4
Total	4,233†		5,387	100.0	4,693	100.0

Exports (Twelve months ended)

Northern Rhodesia					435	0.6
Union of South Africa			81,957	95.6	60,530	89.3
Other British South Africa					10	†
Southern Rhodesia			3,815	4.4	6,802	10.0
Total	15,561†		85,772	100.0	67,777	100.0

*Less than \$1,000.

†Not available by countries.

‡Less than one-tenth of one per cent.

(See chart overleaf)

Canadian Trade with British Africa

(Other than South Africa)

Imports (Twelve months ended)

Country	April					
	Average 1935-39		1947		1948	
	Value \$ '000	Per cent	Value \$ '000	Per cent	Value \$ '000	Per cent
Gambia	*		Nil.		Nil.	
Gold Coast	718	19.8	7,021	45.8	6,484	35.4
Nigeria	393	10.8	4,136	27.0	2,655	14.5
Sierra Leone	7	0.2	4	†	14	0.1
Other British West Africa	*		Nil.		Nil.	
British Sudan	23	0.6	44	0.3	24	0.1
British East Africa	2,487	68.5	4,109	26.8	9,150	49.9
Total	3,629	100.0	15,313	100.0	18,327	100.0

Exports (Twelve months ended)

Gambia	35	2.3	58	0.9	67	0.6
Gold Coast	256	17.1	971	14.3	1,901	18.4
Nigeria	160	10.7	1,777	26.1	1,554	15.0
Sierra Leone	191	12.8	606	8.9	913	8.8
Other British West Africa	*		2	†	*	
British Sudan	104	6.9	625	9.2	881	8.5
British East Africa	753	50.3	2,768	40.7	5,022	48.6
Total	1,498	100.0	6,808	100.0	10,339	100.0

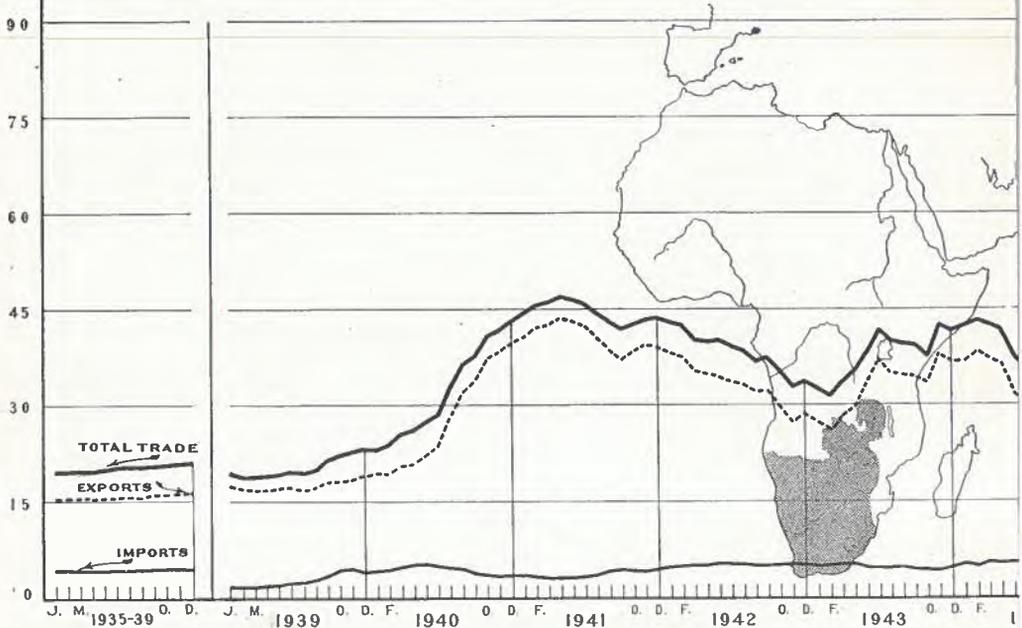
*Less than \$1,000.

†Less than one-tenth of one per cent.

(See chart overleaf)

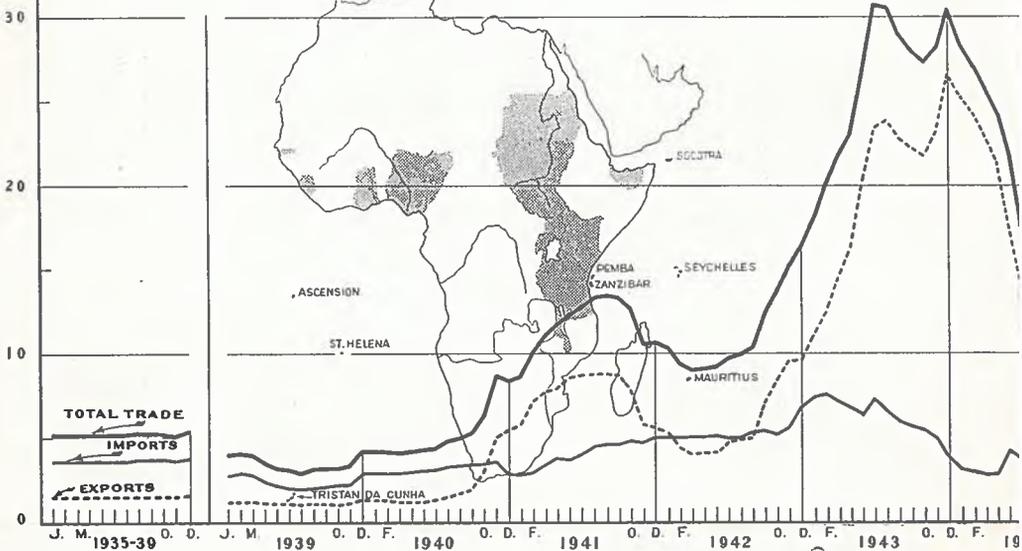
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CANADIAN TRADE WITH BRITISH SOUTH AFRICA, 1939-48, WITH RUNNING TWELVE-MONTH T



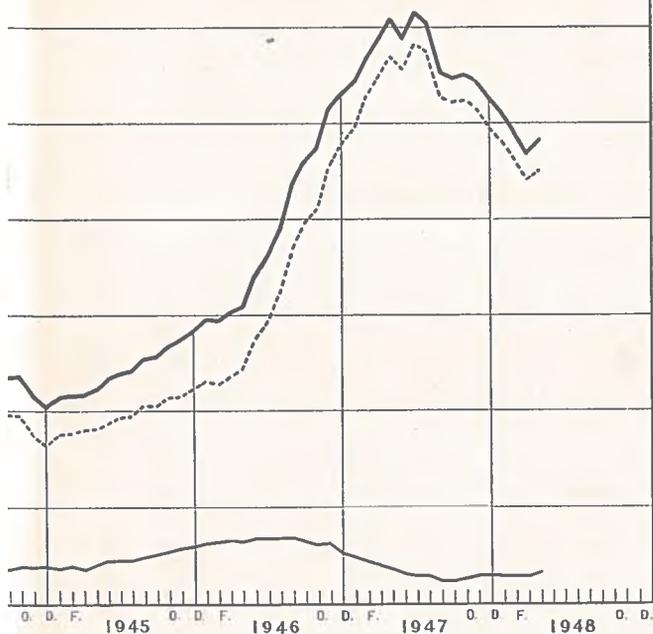
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CANADIAN TRADE WITH BRITISH AFRICA (OTHER THAN SOUTH AFRICA), 1939-48, WITH FOR THE BASE PERIOD, 1935-39 RUNNING TWELVE-MONTH T

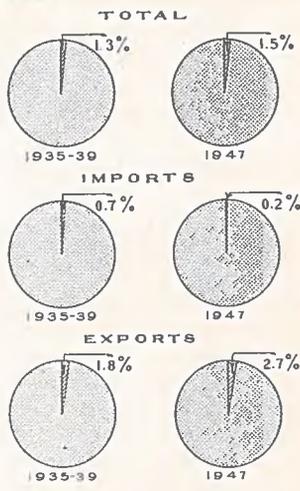


AVERAGE FOR THE BASE PERIOD, 1935-39

ALS



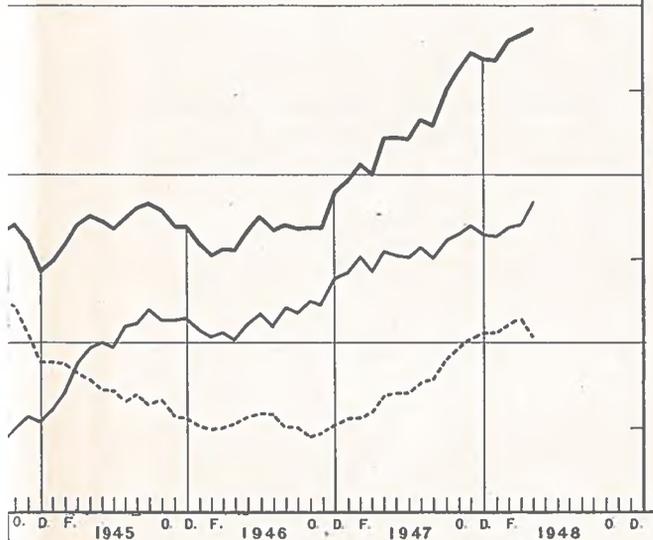
RELATIVE PROPORTIONS OF TRADE WITH BRITISH SOUTH AFRICA TO TOTAL CANADIAN TRADE AVERAGE FOR THE BASE PERIOD 1935-39 COMPARED WITH LATEST COMPLETED CALENDAR YEAR



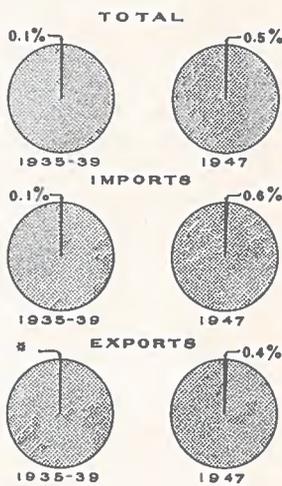
AFRICA) 1939-48 WITH AVERAGE

39

ALS



RELATIVE PROPORTIONS OF TRADE WITH BRITISH AFRICA (OTHER THAN SOUTH AFRICA) TO TOTAL CANADIAN TRADE AVERAGE FOR THE BASE PERIOD 1935-39 COMPARED WITH LATEST COMPLETED CALENDAR YEAR



‡ Less than 1/2 of 1pc.

Peru Amends Import Regulations To Conserve Foreign Exchange

Estimated receipts in 1948 substantially reduced from those of each of two preceding years—Essential imports to be given priority—Quota system adopted for imports based on available exchange—Importers invited to submit applications for import permits.

By C. J. Van Tighem, Commercial Secretary, Canadian Embassy

LIMA, April 28, 1948.—In anticipation of a serious shortage of foreign exchange in 1948, estimated at \$120 million as compared with \$132 million in 1947 and \$164 million in 1946, the Peruvian Government has amended its import control regulations to ensure that the available funds will be equitably distributed and that the essential requirements of the country are provided for. The decline is attributable to the low price of sugar, the sale of which is one of the principal sources of Peru's foreign exchange.

After making allowances for the payment of dividends and interests to foreign firms, insurance and re-insurance remittances, travelling expenses, student and family remittances, cinema and theatrical company expenses, etc., it is estimated that there will be available \$114,000,000 for the importation of foodstuffs, for government imports and those for agriculture, industry, mining and commerce. The planned distribution of this amount is as shown in the following table:

Planned Allocation of Peru's Foreign Exchange, 1948

	Annual United States	Monthly dollars
Foodstuffs (meat, wheat and fats).....	34,000,000	2,833,330
Government imports	20,000,000	1,666,670
Imports for agriculture, industry, mining and commerce....	60,000,000	5,000,000
Total	114,000,000	9,500,000

In accordance with the new system, imports will be based on individual quotas which are being drawn up now by the Superintendency of Foreign Trade in conjunction with the various Peruvian trade associations. The Superintendency of Foreign Trade (through these various associations, such as the Lima Chamber of Commerce, National Industrial Society, National Agricultural Society, and Merchants' Association) has requested local firms to present estimates of their requirements for a year beginning April 1, 1948. Based on the figures received, and in accordance with the advice and recommendations of the particular associations concerned, the Superintendency of Foreign Trade assigns quotas of exchange to individual firms. These firms may then import, on a quarterly basis, up to the limits authorized. These quotas are established principally on the basis of imports in the past.

This change in the import licensing system is a major one and it is expected that, once in effect, the uncertainty and delays that have characterized the system concurrently in use should at least be eliminated. Further, since the quotas which are being established are being drawn up in accordance with the expected supply of foreign exchange, there should be no reason for long delays in remittances to the supplying firms abroad. In this connection it will be of interest to Canadian exporters to learn that there is currently a backlog of approximately \$15,000,000 in foreign

exchange coverage. That is to say, approximately \$15,000,000 worth of licences have been issued, with a right to official exchange, for which no exchange is available, which means, of course, that there will be several months delay before some importers are able to remit.

Pro Forma Invoices Not Required

Importers are no longer required to present a *pro forma* invoice with their application for import licence. They are required, however, to give details as to the weight, unit value, f.a.s. value, miscellaneous expenses and the c.i.f. value in both Peruvian soles and foreign currency.

As the quotas for individual products or groups of products are prepared, notification is given to the commercial public, by means of advertisements in the local press, to the effect that applications for import licences may be presented.

To date, quotas have been established and applications for licences are being received for raw materials; repair parts and accessories for the manufacturing industries; products relating to the mining industry; medicinal products, pharmaceutical specialties and drugs; and trucks. As soon as the quotas for the agricultural industry, transport industry, etc., are prepared, applications may be presented for these, but as yet these quotas have not been drawn up and, in the meantime, no licences are being issued.

Canadian Commercial Corporation Assisted Thirteen Foreign Countries Last Year

Contracts aggregating nearly \$56,000,000 included purchases for United Nations International Children's Emergency Fund—Total new business amounted to \$170,972,000.

CONTRACTS aggregating \$55,795,419 were placed by the Canadian Commercial Corporation during the fiscal year ended on March 31, 1948, on behalf of Argentina, Australia, Belgium, Chile, China, Czechoslovakia, France, Germany (Joint Export-Import Agency), Greece, Japan, the Netherlands, the United Kingdom, the United States and also on behalf of the United Nations International Children's Emergency Fund. As indicated in the annual report of this Corporation, it awarded contracts during the year amounting to \$21,483,470 on behalf of the United Nations Relief and Rehabilitation Administration.

The Canadian Commercial Corporation serves as a procurement agency in this country for foreign governments and governmental agencies. It also assists Canadian importers in procuring goods from other countries and Canadian exporters in the disposal of their goods. There has been a substantial decline in the volume of purchases by foreign governments in Canada, though more than 45,000 contracts were placed during the year for the purchase of stores for the Department of National Defence, the estimated value of which was \$82,223,078. The Corporation also acted on behalf of the Departments of External Affairs and Trade and Commerce, principally in connection with the Canadian International Trade Fair and post-UNRRA relief, on behalf of Canadian Arsenals Limited and the Commodity Prices Stabilization Corporation, contracts aggregating approximately \$11,470,100. The total new business placed by the Corporation during the year amounted to \$170,972,100.

As this Corporation is self-supporting, appropriate charges have been made to the governments and agencies for which purchases have been made, amounting to \$1,143,598. Expenses incurred were \$257,379.

Egypt and Middle East Markets For Preserved Fish Restricted

Owing to shortage of dollars, purchases are limited to sterling area—Canada, which in prewar years was an important supplier of various types, now eliminated—Prospects for regaining share of the market not encouraging.

By J. M. Boyer, Canadian Government Trade Commissioner

[In Canadian currency, one Egyptian pound (£E1) equals \$4.13; one Palestinian pound (£P1) equals \$4.03; one pound sterling (£1) equals \$4.03. One metric ton equals 2,204 pounds; one kilo equals 2.2 pounds.]

CAIRO, March 15, 1948.—Although supplies of fresh fish are available to Egypt and Middle East countries from the Mediterranean, the Red Sea, the Persian Gulf and the Caspian Sea, distribution is hampered by the lack of modern refrigeration facilities, and methods of preserving and canning the fish are utilized to only a limited extent. Accordingly, consumers depend considerably on imported supplies of preserved fish.

In prewar years, Canada was an important participant in these markets, but, due to the current acute shortage of dollar exchange and the fact that preserved fish is regarded as a food requirement of lesser essentiality and is procurable for sterling, permits would not be granted for the importation of preserved fish into any of these countries with the exception of Iran and some of the states in the Arabian Peninsula. Moreover, in Iran, where dollar exchange is more readily available, the fish industry is a government monopoly, and fish imports are not encouraged. In the Arabian Peninsula, the population is small and consumption is accordingly low.

United Kingdom Dominates Market for Smoked Fish

The only smoked fish known to enter into Middle Eastern markets in any quantity is herring, of which the United Kingdom is at present the main supplier. Before the war, Holland was the principal supplier of this item and, while Holland, Denmark, Norway and Canada are now all offering the product, the United Kingdom dominates the market, chiefly because at least one British firm is willing to ship on consignment and is able to make deliveries in ship-load quantities. The Alexandria agent of such a British firm maintains stocks as large as 80,000 boxes, held at shipper's risk. As far as is known, this particular trade in smoked herring is confined to Egypt.

Another smoked fish which is popular when available (chiefly during the winter) is smoked lacarda from Turkey.

Of salt fish, cod is the only one of importance. With Moslems, it is a popular item of food during Ramadan, the month of fasting, which is observed every year. The requirement is for very dry, hard fish (25 per cent moisture content) that will keep in hot climates. Currently imports are from Norway, which are able to meet local requirements as to dryness.

Low-priced Canned Fish Most Favoured

In canned fish the greatest volume of business is done in low-priced varieties that can be retailed at a figure low enough to cater for the masses of the population. Canned herrings, pilchards and some sardines are in



Cairo—Feluccas, on the River Nile, which are used extensively for the transportation of goods in Egypt.

this low-priced group. Main supplies of canned herrings come from the United Kingdom and Norway. This fish is sold in flat oval tins of 14 ounces, in tomato sauce or natural oil, and retails at 7 piasters, or slightly less than 30 cents Canadian, per tin. Canned herring from Canada has been sold in Middle Eastern markets at various times.

Canned pilchards were imported in prewar years from Canada and the United States. At present South Africa is participating in this trade, but the flavour of the product supplied is not the same as that of the American, and it has not become popular.

Portugal, Spain and Norway Supplying Sardines

Sardines may be divided into two classes: luxury and popular. Sources of supply are Portugal, Spain, France, North Africa, Norway, Canada, and the United States. Portugal, Spain and Norway are the only countries active in the market at present. Portuguese sardines are packed in olive oil of the best quality, in 4½-ounce tins, which retail at about 9 piasters each, or nearly 40 cents Canadian. Norwegian sardines are packed in natural oils, or occasionally in poor-grade olive oil, and in 3¾-ounce tins, retailing at 4½ piasters each, or just under 20 cents Canadian. This price is not low enough to appeal to the bulk of the consuming population.

Canned mackerel is purchased as a substitute for canned salmon and is of little interest when salmon is available.

United States Brands of Canned Salmon Popular

Of prewar supplies of canned salmon, 80 per cent came from Japan, the United States and Canada providing the remainder. During the war, when salmon was under allocation, the United States supplied the largest part of requirements, and well-known American brands became popular. The favourite pack is the 1-pound tall tin, and fish with a red colour is greatly preferred. When Japanese salmon was available and at low prices, it was used by all classes of the population but, at current prices, salmon consumption is very much restricted.

The extent of the potential market for preserved fish in the various countries of the Middle East is indicated in the following tables, showing imports for the most recent periods for which statistics are available:

Imports of Preserved Fish into Egypt

	1947		1946		1945	
	*Gross Kilos	£E	Gross Kilos	£E	Gross Kilos	£E
Fish, fresh, salted, dried or smoked	3,948,628	322,949	3,096,067	289,108	333,777	40,663
	Net Kilos		Net Kilos		Net Kilos	
Fish, tinned, etc.	1,634,131	241,335	779,762	152,942	931,578	155,371

*Includes weight of packing.

Imports of Preserved Fish into Palestine

	Jan.-Oct., 1947		1946		1945	
	M. Tons	£P	M. Tons	£P	M. Tons	£P
Fish in brine	1,285	100,856	3,376	263,415	3,105	277,735
Fish, dry, salted or smoked	Kilos		Kilos		Kilos	
	1,513,516	84,002	2,593,008	179,223	386,257	30,132
Fish, tinned, in oil.....	2,017,876	304,724	1,674,946	308,006	943,545	219,188

Imports of Preserved Fish into the Sudan

	Jan.-Nov., 1947		1946		1945	
	M. Tons	£E	M. Tons	£E	M. Tons	£E
Salted fish	1,844	112,773	1,939	145,324	1,619	108,803

Imports of Preserved Fish into Cyprus

	Jan.-Nov., 1947		1946		1945	
	Cwt.	£	Cwt.	£	Cwt.	£
Dried, salted or pickled fish .....	....	....	10,497	84,024	2,524	25,529
Tinned fish .....	....	....	....	24,949	....	5,441
Fish	20,479	171,806	....	....	....	....

Venezuela Buys Canadian Dairy Cattle

Venezuela has recently placed an order in Canada for one hundred head of dairy cattle, which will leave shortly for Caracas, the upland capital of that South American republic. This purchase of Holstein-Friesians is reported to be one of the largest made in Canada for any of the Latin American countries, and will contribute much to the national wealth of Venezuela, on whose interior plains, or *llanos*, an extensive livestock industry has been developed. Efforts are being made to improve the strain of its dairy cattle, and attention is now being directed to Canada as a profitable source of purebred stock.

In accordance with the policy of this country to stimulate interest in its exportable products, the Canadian Trade Commissioner in Caracas discussed with government authorities the subject of Canada's established reputation as a source of supply for dairy cattle. Considerable correspondence culminated in this order, which may possibly be the first of many, if the livestock is favourably received by farmers to whom the animals are sold by the government.

Tasmania to Supply Great Britain With Fresh Apples This Year

Total of 2,500,000 bushels to be shipped this year—Crop expected to be approximately six to seven million bushels of extra fancy, fancy and good grades—Marketing handled by Australian Apple and Pear Board.

By Dr. W. C. Hopper, Commercial Secretary for Canada
(Agricultural Specialist)

SYDNEY, April 19, 1948.—Tasmania is expected to supply Great Britain with 2,500,000 bushels of fresh apples this year, representing almost two-thirds of the Australian contract for 3,500,000 bushels. If sufficient shipping space was available, Tasmania could furnish more than 3,000,000 bushels.

The Tasmanian crop this year is expected to be in the neighbourhood of six to seven million bushels of "extra fancy", "fancy" and "good" grades. The outlook for marketing the 1947-48 crop at this time (April, 1948) is as follows: United Kingdom, 2,500,000 bushels; Scandinavian countries, 400,000; for drying (1-8), 750,000; for solid pack (about 50 per cent return), 750,000; and Australian mainland (Victoria, New South Wales and Queensland), 1,250,000 bushels.

Only "fancy" quality apples are marketed in fresh form to overseas markets and Australian consumers, and "good" grade apples are used for drying and solid pack. According to the Chief Horticulturist of Tasmania 70 to 75 per cent of the total apple crop reaches the "fancy" grade and 15 to 20 per cent the "good" grade.

A relatively small quantity will be consumed by Tasmania's 250,000 people, but some good-quality apples as well as several hundred thousand bushels of low-grade fruit will be fed to pigs, used for rabbit poison, made into cider or wasted.

In addition to fresh apples, the British Ministry of Food will take 500 tons of dried apples. It is not expected, however, that there will be any export of solid pack to the United Kingdom this season.

The price to be paid by the British Ministry of Food for fresh apples is 14 shillings 4 pence, Australian currency, per case (42 pounds) f.o.b., seaboard (about \$2.30 Canadian money at present rates of exchange). The price for dried apples is one shilling sixpence (about 42 cents), less 2½ per cent, and the price for solid pack to the producer, if any should be shipped, is eight pence (about 10¾ cents) a pound less five per cent. The freight on fresh apples to the United Kingdom is about ten shillings five pence per case.

Apples and Pear Crops Marketed by Government Agency

During the war years and including the 1947-48 season, the marketing of the Tasmanian apple and pear crops has been under the control of the Australian Apple and Pear Board, which annually acquires the entire crops of Tasmania and Western Australia. This Board also acquired, in 1940-41 and 1941-42, the apple and pear crops of other states. Since then, however, the Commonwealth Acquisition Scheme has not been applied to the four states, New South Wales, Queensland, Victoria and South Australia. The population in these states is relatively large and consumes practically all the apples grown.

The apple grower is paid for his crop whether or not it is marketed. During the war, when transport to the United Kingdom was not possible, millions of bushels were never marketed. For the 1947-48 crop, the average return to the growers is approximately three shillings three pence per bushel (about 52½ cents) on the trees. The payment by the Apple and Pear Board varies from two shillings three pence to five shillings per bushel, according to variety and quality. The Board reimburses the growers and packers for their actual expenses for handling the crop and this, in 1948, will average about three shillings per case. The empty cases cost about three shillings each. The cost to the Board for delivery of apples to the wharf amounts to about eight pence per case and wharfage costs about two pence per case. Wharfage is arranged for the Board by an officer appointed by a committee representing the five large fruit shipping agencies. This Committee is also responsible for advising the growers and packers when to deliver apples to the wharf and how much is required from time to time. The total of these costs is something more than ten shillings.

Acquisition Scheme Generally Satisfactory to Apple Growers

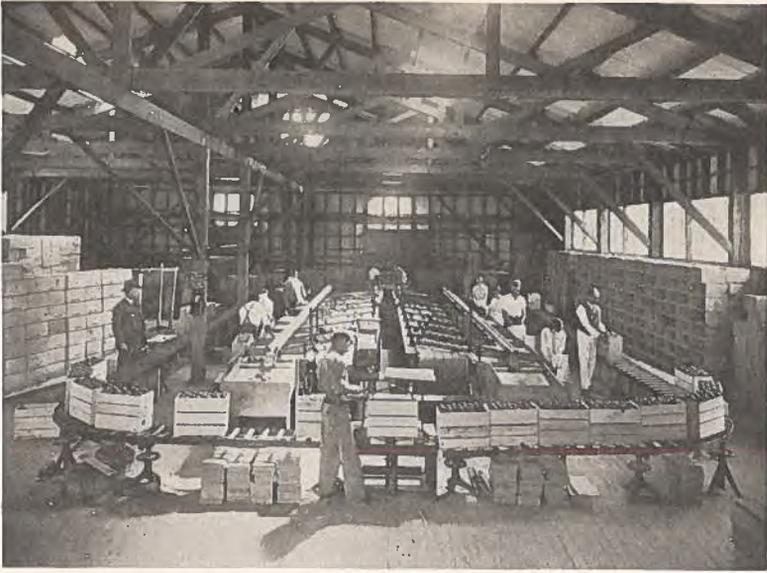
The acquisition scheme operated by the Apple and Pear Board has been generally satisfactory to the Tasmanian apple growers. Orchards have been maintained in good condition. Indebtedness has been reduced instead of increased, and persons interested in the industry stated that producers would not be favourable to a return to the methods of marketing which prevailed prior to the war. If the emergency powers of the Federal Government, under which the Apple and Pear Board operates, cease at the close of 1948, it is expected that the apple growers will ask for a state authority to regulate marketing. This, however, will not be sufficient. Federal and complementary legislation in all states will be necessary if a plan of marketing, similar to that now in operation, is to take the place of the present marketing program.

The Apple and Pear Board has cold storage space for about 600,000 cases under its control in Tasmania. While temperatures during the Tasmanian winter only occasionally fall below freezing, the weather from the autumn picking to the spring is usually quite cool, and apples which are not marketed, or cannot be placed in cold storage, are reasonably well preserved in ordinary temperatures in the packing sheds.

About 22,000 acres of land in Tasmania are devoted to bearing apple trees. There are about 2,500 growers. The yield per acre in 1946-47 was 209 bushels, 46 bushels per acre higher than Western Australia and more than 100 bushels per acre above any of the other four states. In 1945-46, Tasmanian production per acre was 366 bushels and, for the 10 years ended 1944-45, the average yield per acre was 242 bushels. The total area in bearing apple trees in Australia in 1946-47 was 76,276 acres. The Tasmanian apple area, therefore, represents about 28 per cent of the total Australian acreage but, due to the higher yields per acre in this state, Tasmania usually produces half or more of the total Australian apple crop.

Production Concentrated in Two Areas in Tasmania

Apple production in Tasmania is concentrated in two areas, one in the southern part of the state, mainly in valleys between low mountain ranges close to the coast south of the capital city of Hobart, and a smaller area extending north from the city of Launceston to the northern coast of the island. The land ranges from undulating to steep hillsides and the soil in the orchards is, in the main, quite fertile. Land with bearing



Tasmania—Apple crop estimated at between six and seven million bushels of “extra fancy”, “fancy” and “good” grades this year, and shipments of fresh apples to Great Britain at 2,500,000 bushels.

orchards of the most desirable varieties on good soils and near markets is worth about £110 to £130 per acre (about \$350-\$425). The value of average orchard planted land would be about £70 to £80 per acre. There is still much land in Tasmania suitable for apple growing, but no official encouragement is being given to the expansion of apple production and very few new plantings have occurred in recent years. An overseas market

Average Potential Yield of Apples

Variety	Trees	Bushels	Average per tree	Percentage of trees
Alexander	5,607	19,723	3.5	.19
Alfriston	67,784	160,288	2.3	2.31
Cleopatra	260,999	902,502	3.4	8.93
C.O.P.	119,700	208,928	1.7	4.09
Crofton	99,226	199,061	2.0	3.39
Crow Egg	3,238	9,874	3.0	.11
Delicious	131,230	260,781	1.9	4.49
Democrat	363,184	873,787	2.4	12.42
Duke of Clarence	26,511	87,054	3.2	.91
Dunn's	19,461	40,914	2.1	.66
French Crab	90,416	348,843	3.8	3.09
Geeveston Fanny	51,835	162,265	3.1	1.77
Golden Delicious	2,347	6,016	2.5	.08
Granny Smith	230,427	513,168	2.2	7.88
Gravenstein	1,850	3,012	1.6	.06
Jonathan	470,453	1,178,602	2.5	16.09
King Pippin	11,251	28,237	2.5	.31
London Pippin	28,246	46,550	1.6	.96
Ribston Pippin	23,794	68,587	2.0	.81
Rokewood	3,692	7,912	2.1	.13
Rome Beauty	14,369	40,297	2.8	.50
Scarlet Pearmain	197,290	211,250	1.0	6.75
Stone Pippin	5,165	17,785	3.4	.18
Sturmer	563,260	1,679,333	2.9	19.28
Tasman's Pride	53,780	188,111	3.4	1.84
Worcester Pearmain	40,011	90,752	2.2	1.36
Yates	3,968	4,539	1.1	.13
Other varieties	33,493	71,688	2.1	1.13
Total	2,922,587	7,429,857	2.5	99.85

is essential until domestic consumption has increased considerably. Costs of shipping to the United Kingdom are high, and it is felt that there is likely to be increased competition from apple growers closer to the United Kingdom and other European markets. The apple industry of Australia, however, has the advantage of shipping fruit to market at a different time of the year from apples grown in America and Europe.

Most of the trees of the less desirable varieties have now been "converted" to more popular types. Twenty-seven varieties make up about 99 per cent of the 2,922,587 trees, and six varieties, namely Sturmer, Jonathon, Democrat, Cleopatra, Granny Smith and Scarlet Pearmain, represent about 72 per cent of the trees.

"Vase" Shape Tree Favoured by Growers

The favoured type of tree is of the low open-headed order known as the "vase" shape. This is particularly suited to the climate, as it ensures that the maximum amount of sunlight reaches the fruit, thus giving good colour and reducing the danger of fungus infection.

The orchards are mostly cultivated with tractor power. In many cases, green crops to maintain organic matter, such as tick-beans, peas, blue lupins, barley, rye, etc., are planted between the rows of trees. These crops are usually sown in the autumn and are ploughed under, when in flower, in the spring. Fairly heavy dressings of complete fertilizers are applied to the apple orchards and usually six sprayings annually are made. Many of the trees are 40 or more years of age.

About 50 per cent of the Tasmanian apple crop is centrally packed, usually within a day or so of picking, by co-operative or private packers. Some of the growers with large orchards pack their own. Probably two-thirds of the apples are exported in pine boxes, the wood for which comes from Canada. Other boxes are made from Australian or Scandinavian woods.

Britain Plans Larger Textile Exports To Offset Machinery Reductions

Greater exports of cotton, woollen and worsted goods planned to offset reductions, mainly in machinery and vehicles groups, in 1948 target—Overall export target is 150 per cent of 1938 export volume.

By A. E. Bryan, Commercial Counsellor for Canada

LONDON, April 15, 1948.—Britain plans to expand her production of textiles to provide for larger exports of cotton, woollen and worsted goods, and to compensate for reductions in machinery and vehicles. An economic survey for 1948 reduced the overall target to 150 per cent of the 1938 volume, due largely to the shortage of steel and, to a lesser extent, to the saturation of markets.

In the case of a small number of consumer goods, saturation will prevent overseas markets from taking the full quantities contemplated in last year's plans. Exportation of many consumer goods has also been hampered by the recent imposition of import restrictions abroad. The position has recently improved, however, as the result of commercial agreements with many of the countries concerned, whereby they have undertaken to accept limited quantities of less essential goods from the United Kingdom.

British Production Targets

	September targets at end, 1948 prices	New targets at end, 1948 prices	Actual exports, Jan./Feb., 1948
(Millions of pounds)			
Food, drink and tobacco	8.35	8.35	7.66
Raw materials:			
Coal	3.90	3.90	1.08
Other raw materials	3.45	2.10	2.76
Metals and Metal Products:			
Iron and steel manufactures	8.10	8.10	7.65
Non-ferrous metals	4.30	4.55	5.03
Implements and instruments	3.45	3.35	3.33
Electrical goods	5.50	6.60	5.32
Agricultural machinery	4.75	2.10	1.47
Electrical machinery	2.45	2.45	2.26
Textile machinery	3.14	2.83	2.74
Other machinery	14.51	14.67	11.90
Cars and commercial vehicles	12.60	9.00	6.67
Locomotives and rolling stock	2.40	2.40	1.67
Shipbuilding	2.15	2.15	2.53
Aircraft	2.80	2.50	2.31
Other vehicles and tires	6.40	5.45	4.52
Total	72.55	66.15	57.40
Textiles and Clothing:			
Cotton	11.30	13.00	8.54
Woollens and worsteds	11.25	12.40	7.03
Rayon and silk	4.40	4.40	3.10
Other textiles	3.40	3.40	2.19
Apparel	4.30	4.20	2.36
Total	34.65	37.40	23.22
Other Manufactures:			
Footwear	1.45	1.45	0.72
Chemicals, etc.	9.00	8.05	6.24
Oils, fats, resins	1.05	1.25	0.56
Pottery, glass, abrasives	4.25	4.25	3.45
Leather goods	1.45	1.45	0.72
Paper goods	2.00	2.20	1.75
Rubber manufactures	1.30	1.05	0.52
Woodwork	0.15	0.15	0.12
Coke and manufactured fuel	0.10	0.10	0.02
Miscellaneous manufactures	9.70	8.65	6.20
Total	30.45	28.60	20.30
Total manufactures	137.65	132.15	100.92
Other items	3.50	3.50	3.78
Total exports	156.85	150.00	116.20

Regarding the effect on dollar earnings of the reduced targets, the Board of Trade expects that more will be gained by increasing exports of textiles to Canada and the United States than will be lost by reducing engineering equipment. It is hoped that cuts in engineering exports will take place mostly in those to soft currency areas.

Iraq Has Severe Shortage of Wheat

Plagues of locusts and a second dry year in succession resulted in wheat crops 50 to 80 per cent below normal last year. As well, considerable quantities of grain were exported and smuggled abroad. The consequent domestic shortage has raised the price of wheat from a wartime £30 per ton to £200 per ton in April, 1948, and has multiplied eightfold the price of bread.

Trade and Tariff Regulations

British Guiana Increases Duties on Beer, Spirits, Wine and Tobacco

Port of Spain, June 11, 1948.—(FTS)—By Customs Duties (Amendment) Ordinance, 1948, dated March 23, 1948, British Guiana increased import duties on beer, spirits, wine and tobacco. The new rates shown hereunder are respectively those of the British preferential and general tariffs, with the amount of the increase under both tariffs shown in parentheses: beer, ale, stout and porter, \$1.15 and \$1.44 per gallon (40 cents per gallon); brandy not over 85 per cent proof spirit, \$8.00 and \$9.25 per gallon; brandy over 85 per cent proof spirit, \$9.50 and \$11 per proof gallon; whisky and gin not over 85 per cent proof spirit, \$9.50 and \$11.25 per gallon; whisky and gin, over 85 per cent proof spirit, \$10.75 and \$12.85 per proof gallon; rum, \$9 and \$15.50 per proof gallon; liqueurs, bitters and cordials, not over proof, \$10.50 and \$11 per gallon; liqueurs, bitters and cordials, over proof, \$10.50 and \$11 per proof gallon; spirits and preparations containing spirits, n.o.p., \$8.50 and \$14.50 per proof gallon (all the foregoing spirits increased by \$2); cigars, \$3.50 and \$4.20 per pound; cigarettes, manufactured in the British Empire entirely from Empire-grown tobacco, \$3.10 per pound; cigarettes manufactured in the British Empire entirely from foreign-grown tobacco, \$3.50 per pound; cigarettes manufactured in foreign countries, \$4.20 per pound; tobacco manufactured in the British Empire entirely from Empire-grown tobacco, \$2.35 per pound; tobacco manufactured in the British Empire entirely from foreign-grown tobacco, \$2.80 per pound; tobacco manufactured in foreign countries, \$3.75 per pound (rates on all foregoing tobaccos increased by 60 cents per pound). On leaf tobacco the new rates vary from \$1.15 to \$2.05 per pound, regardless of the country of origin (representing increases of 15 to 70 cents per pound). The rates of duty on wines were also increased.

The above items are subject to surtax of 30 per cent of the duty.

Cuba Classifies Countries for Tariff Treatment

Havana, May 27, 1948.—(FTS)—Under a presidential decree published on May 19, the various foreign countries trading with Cuba were placed in certain categories for tariff treatment during the current year. This procedure arises out of the application of Law 14 of March 15, 1935, referred to in *Foreign Trade* of May 17, 1947. The general principle under which this tariff treatment is accorded to the different countries is based on the balance of trade of each country with Cuba.

Under the recently issued decree, all most-favoured-nation countries, including those signatory to the Geneva Agreement on Tariffs and Trade, are confirmed in the treaty rates established by the agreement signed at Geneva.

The majority of countries are placed in the minimum tariff schedule (which in some cases is higher than the Geneva rates), but a number of countries are assessed the minimum tariff plus 25 per cent. (This rate is accorded those countries whose purchases were more than 25 per cent but less than 50 per cent of their sales to Cuba.) The countries so assessed are the following: Bahamas, El Salvador, Guatemala, Honduras, Uruguay, Panama Canal Zone, Czechoslovakia and Switzerland.

The maximum tariff is assessed on imports from the following countries, whose purchases were less than 25 per cent of their sales to Cuba: Aruba, Brazil, Curaçao, Ecuador, Grand Cayman, British Guiana, Mexico, Nicaragua, other British West Indies, other Dutch West Indies, Paraguay,

Trade and Tariff Regulations—Continued

Trinidad, Germany, Denmark, Hungary, Norway, Sweden, Ceylon, Straits Settlements, British India, Japan, Turkey, Belgian Congo, Madagascar and Hawaii.

The countries privileged to import under treaty rates are the following: United States, Canada, Belgium, France, Holland, Luxembourg, United Kingdom, Australia, Argentina, Spain, Canary Islands, Italy and Chile.

Notwithstanding these different classifications, certain items are assessed as prime necessities, and, therefore, always enter under the minimum tariff, regardless of the country of origin. Of principal interest to Canada in this list is codfish.

Venezuelan Marking Laws Regarding Weights and Measures Reviewed

Caracas, June 4, 1948.—(FTS)—The Venezuelan regulations covering the marking and labelling of imported commodities in respect to weights and measures are contained in the Law of July 12, 1939. The use within the country of any system of weights and measures other than the metric-decimal system is illegal and is prohibited.

In public acts, in commercial books and registers, in advertisements, and on billboards or posters, on receipts, notes, commercial documents and in general in all those acts or documents in which third parties are interested, all mention of weights and measures must be made precisely to conform with the nomenclature of the metric-decimal system.

In all cases in which citations, references or reproductions of acts or documents of previous date to July 12, 1939, or of other countries, are made, there must necessarily be expressed the equivalent metric-decimal in parenthesis.

All edibles such as bread, brown sugar cones, etc., which are manufactured in moulds or in any other special form or are sold by the piece must always show a fixed metric weight for each piece.

When flours, alimentary pastes and other articles of consumption are sold in packages, such articles must be marked with their metric net weight on the labels or wrappers of the packages. Marks or mention of any non-metric weights or measures shown on the original imported package must be marked out or over-marked.

All casks, kegs, barrels, bottles or any other similar containers of wine, alcohol or other liquids as well as other imported containers, unopened or untampered with, offered for consumption, may be sold as units providing they indicate, by an external or outside mark, the capacity in litres.

Sawn lumber cannot be sold in any form other than by volume, expressed in measures of the metric-decimal system.

Coal and other pulverized substances may not be sold by measure, only by weight.

Measuring tapes and rulers carrying advertisements, cannot be distributed or used without complying with legal regulations or prescriptions.

Barbados Licences Must Show Total Dollar Currency

Port of Spain, June 11, 1948.—(FTS)—On May 13, 1948, the Controller of Food Supplies and Prices, Barbados, issued a notice to importers that import licences covering imports from the United States and Canada must show, in addition to the c.i.f. price per unit, the total amount of the United States or Canadian currency involved.

Trade and Tariff Regulations—*Concluded*

Jamaica Removes Certain Import Duties

Kingston, June 17, 1948.—(FTS)—Effective June 1, 1948, the following articles, formerly subject to customs charges when imported into Jamaica, were added to the list of commodities which may be imported free of duty from any source: barbed wire and barbed wire staples; hog fencing; poultry netting; dairy barn equipment, viz.: (a) compressors and motors, if imported with and used as integral parts of milking machines; and (b) stanchions and stalls; agricultural machinery, viz.: (a) cane slings; and (b) motors for operating irrigation pumps; rock salt, mineral salt licks and grits; livestock and poultry feeds; articles used in the livestock, dairying and poultry industries.

Dr. T. W. Grindley Made Member of Canadian Wheat Board

Dr. T. W. Grindley, Secretary of the Canadian Wheat Board for the last ten years, has been appointed a member of that organization. Born on the Isle of Man, Dr. Grindley came to Canada at the age of seven, and attended the University of Alberta, from which he received his B.A. and B.Sc. (Agri.) degrees. He undertook post-graduate studies at the University of Minnesota, from which he received his M.A. degree in 1927 and his Doctorate in 1929.

Joining the staff of the Dominion Bureau of Statistics, in Ottawa, in 1929, Dr. Grindley became Chief of the Agricultural Branch, holding that position until his appointment in 1938 as Secretary of the Canadian Wheat Board. He was Canadian delegate to the United Nations Food Conference, held at Hot Springs, Va., in 1943.

R. G. C. Smith Posted to Rome



R. G. C. Smith

Robert Guy Carrington Smith, Commercial Secretary for Canada in Havana since 1946, has been appointed Commercial Secretary for Canada in Rome, for which he will sail next September, on conclusion of his present tour in this country. He will succeed J. P. Manion, who has been appointed Commercial Secretary in Paris.

Born in Quebec City in January, 1908, Mr. Smith attended Bishop's College School, in Lennoxville, Que., and graduated in 1929 from the Royal Military College of Canada, in Kingston. He then attended McGill University, and joined the Trade Commissioner Service in 1930, being posted to Buenos Aires in April, 1931, as assistant trade commissioner. Mr. Smith was transferred to New York in October,

1936, and joined the Royal Canadian Artillery in 1940. Following a motorcycle accident in October, 1943, he returned to Canada, and served in the Directorate of Military Operations and Planning, at National Defence Headquarters, until the conclusion of hostilities. On his recall to the Trade Commissioner Service, he was posted to Havana in January, 1946, and rendered considerable assistance to Canadian delegates attending the World Trade Conference.

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, and to discuss 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 trade associations in the areas concerned:

Ottawa—Foreign Trade Service, Department of Trade and Commerce

Brantford—Board of Trade.
Brockville—Chamber of Commerce.
Calgary—Board of Trade.
Charlottetown—Board of Trade.
Edmonton—Canadian Manufacturers' Association.
Fredericton—Chamber of Commerce.
Gananoque—Chamber of Commerce.
Granby—Chamber of Commerce.
Guelph—Board of Trade.
Halifax—Board of Trade.
Hamilton—Chamber of Commerce.
Kingston—Chamber of Commerce.
Kitchener—Chamber of Commerce.
London—Chamber of Commerce.
Montreal—Montreal Board of Trade.
Pembroke—Chamber of Commerce.

Quebec City—Board of Trade.
Regina—Chamber of Commerce.
Renfrew—Board of Trade.
Saint John—Board of Trade.
Sarnia—Chamber of Commerce.
Sherbrooke—Chamber of Commerce.
St. Catharines—Chamber of Commerce.
Toronto—Canadian Manufacturers' Association.
Vancouver—H. W. Brighton, Department of Trade and Commerce, 355 Burrard Street.
Welland—Board of Trade.
Windsor—Chamber of Commerce.
Winnipeg—Canadian Manufacturers' Association.

R. G. C. Smith, Commercial Secretary for Canada in Havana for the past two years, is touring those sections of this country that are principally concerned in exports to the southern market.

Montreal—June 22-July 3.
Quebec City—July 5.
Saint John—August 24-26.
Halifax—August 27-September 2.

Charlottetown—September 3-4.
Penticton—September 13-14.
Vancouver—September 16-21.

M. B. Palmer, Canadian Trade Commissioner in Kingston, Jamaica, has returned to this country on tour, which commenced in Montreal on June 14, 1948. He will discuss with interested businessmen factors affecting trade relations between this country and Jamaica.

Saint John—July 2-3.
Quebec City—July 6.
Montreal—July 7.
Cornwall, Gananoque, Kingston—July 8.
Ottawa—July 9-10.
Toronto—July 12-22.
Welland, St. Catharines—July 23.
Hamilton—July 26-27.

Brantford, Paris—July 28.
Windsor, Walkerville—July 29-30.
Sarnia—July 31.
London—August 3.
Guelph—August 4.
Kitchener—August 5.
Winnipeg—August 9.
Calgary—August 12.

J. C. Britton, Commercial Secretary for Canada in St. John's, Newfoundland, for the last five years, commenced in Halifax on May 22 a tour of Eastern Canada, during which he will discuss with businessmen the development of trade between this country and Newfoundland.

Montreal—June 21-July 3.
Granby—July 5.
Drummondville—July 6.
Sherbrooke—July 7.
Iroquois, Prescott, Brockville—July 8.

Kingston, Gananoque—July 9.
Ottawa—July 12.
Carleton Place, Arnprior—July 13.
Renfrew, Pembroke—July 14.



Transportation



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.

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 Montreal

*Calls at Halifax about four days later.

(r) Indicates refrigerated cargo space.

Destination	Loading Date	Vessel	Operator or Agent
Aden—			
Port Aden	July 8-14	<i>Maron</i>	Cunard Donaldson
Africa-East—			
Lourenço Marques...	June 28-July 10	<i>Argobec</i>	Elder Dempster
Lourenço Marques...	July 2-10	<i>Thorscape</i>	Kerr Steamships
Lourenço Marques...	July 12-24	<i>New Texas</i>	Elder Dempster
Lourenço Marques...	July 25-Aug. 5	<i>Fantee</i>	Elder Dempster
Lourenço Marques...	July 26-28	<i>Colchester County</i>	March Shipping
Lourenço Marques...	August 6-17	<i>Cabano</i>	Elder Dempster
Lourenço Marques...	August 18-19	<i>Vancouver County</i>	March Shipping
Lourenço Marques...	August 20	<i>Norden</i>	Kerr Steamships
Lourenço Marques...	September 20	<i>Thorshall</i>	Kerr Steamships
Beira	July 12-24	<i>New Texas</i>	Elder Dempster
Beira	August 18-29	<i>Calumet</i>	Elder Dempster
Lourenço Marques...	July 2-10	<i>Thorscape</i>	Kerr Steamships
Mombasa	August 20	<i>Norden</i>	Kerr Steamships
	September 20	<i>Thorshall</i>	Kerr Steamships
	June 28-July 10	<i>Argobec</i>	Elder Dempster
	July 2-10	<i>Thorscape</i>	Kerr Steamships
	July 12-24	<i>New Texas</i>	Elder Dempster
	July 25-Aug. 5	<i>Fantee</i>	Elder Dempster
	July 26-28	<i>Colchester County</i>	March Shipping
	August 6-17	<i>Cabano</i>	Elder Dempster
	August 18-19	<i>Vancouver County</i>	March Shipping
	August 18-29	<i>Calumet</i>	Elder Dempster
	August 20	<i>Norden</i>	Kerr Steamships
	September 20	<i>Thorshall</i>	Kerr Steamships
Africa-South—			
Cape Town	July 25-Aug. 5	<i>Fantee</i>	Elder Dempster
Port Elizabeth	July 26-28	<i>Colchester County</i>	March Shipping
East London	August 6-17	<i>Cabano</i>	Elder Dempster
Durban	August 18-19	<i>Vancouver County</i>	March Shipping
	August 18-29	<i>Calumet</i>	Elder Dempster
	August 20	<i>Norden</i>	Kerr Steamships
	September 20	<i>Thorshall</i>	Kerr Steamships
Argentina—			
Buenos Aires	July 10-15	<i>Brazilian Prince</i>	Furness Withy
Buenos Aires	July 21-22	<i>Mormacmar</i>	Montreal Shipping
Buenos Aires	August 7-11	<i>English Prince</i>	Furness Withy
Buenos Aires	August 12-17	<i>Royal Prince</i>	Furness Withy
Australia—			
Brisbane	July 28-August 4	<i>Paparoa</i>	Montreal Australia New Zealand Line
Sydney			
Geelong			
Melbourne			
Adelaide			
Belgian Congo—			
Matadi	July 26-28	<i>Colchester County</i>	March Shipping

Departures from Montreal—Continued

Destination	Loading Date	Vessel	Operator or Agent
Belgium—			
Antwerp.....	July 3-10	<i>Beaconsfield</i>	Cunard Donaldson
Antwerp.....	July 7	<i>Kent County</i>	Canada Steamships
Antwerp.....	July 7-12	<i>Svaneholm</i>	Swedish American
Antwerp.....	July 8-14	<i>Domfront</i>	Furness Withy
Antwerp.....	July 14-18	<i>Westralia</i>	Montreal Shipping
Antwerp.....	July 15	<i>Prins Frederik Hendrik</i>	Shipping Limited
Antwerp.....	July 23	<i>Hedel</i>	Shipping Limited
Antwerp.....	July 27	<i>Hada County</i>	Canada Steamships
Antwerp.....	July 29	<i>Grey County</i>	Canada Steamships
Antwerp.....	August 7-14	<i>Beckenham</i>	Cunard Donaldson
Antwerp.....	August 16	<i>Brant County</i>	Canada Steamships
Brazil—			
Rio de Janeiro.....	July 10-15	<i>Brazilian Prince</i>	Furness Withy
Santos.....	July 21-22	<i>Mormacmar</i>	Montreal Shipping
	August 7-11	<i>English Prince</i>	Furness Withy
	August 12-17	<i>Royal Prince</i>	Furness Withy
British Honduras—			
Belize.....	August 2-6	<i>Fort Panmure</i>	Saguenay Terminals
Canal Zone—			
Cristobal.....	August 2-6	<i>Fort Panmure</i>	Saguenay Terminals
Ceylon—			
Colombo.....	July 5-10	<i>Cliffside</i>	March Shipping
Colombo.....	July 15-20	<i>City of Lille</i>	McLean Kennedy
Colombo.....	July 25-30	<i>Gulfside</i>	March Shipping
Colombo.....	August 1-5	<i>Martha Kleppe</i>	McLean Kennedy
Colombo.....	August 1-7	<i>A Ship</i>	Cunard Donaldson
Colombo.....	August 15-20	<i>City of Agra</i>	McLean Kennedy
China—			
Shanghai.....	July 5-10	<i>Lakeside</i>	March Shipping
Shanghai.....	July 20-25	<i>Oceanside</i>	March Shipping
Shanghai.....	August 5-10	<i>City of Poona</i>	McLean Kennedy
Colombia—			
Barranquilla.....	July 12-13	<i>Brush</i>	Swedish American
Barranquilla.....	July 21-27	<i>Apollo (r)</i>	Saguenay Terminals
Barranquilla.....	August 9-12	<i>Benny (r)</i>	Saguenay Terminals
Barranquilla.....	September 2-5	<i>Shakespeare Park</i>	Saguenay Terminals
Cuba—			
Havana.....	July 20-25	<i>Sparreholm</i>	Swedish American
Santiago.....			
Denmark—			
Copenhagen.....	July 7-12	<i>Svaneholm</i>	Swedish American
Copenhagen.....	July 22-23	<i>Polycrest</i>	Swedish American
Copenhagen.....	July 27-28	<i>Erland</i>	Swedish American
Dominican Republic—			
Ciudad Trujillo.....	August 2-6	<i>Fort Panmure</i>	Saguenay Terminals
Ciudad Trujillo.....	September 2-5	<i>Shakespeare Park</i>	Saguenay Terminals
Eire—			
Dublin.....	July 9-13	<i>Torr Head</i>	McLean Kennedy
Dublin.....	July 19-23	<i>Lord Glentoran</i>	McLean Kennedy
Egypt—			
Alexandria.....	July 8-14	<i>Maron</i>	Cunard Donaldson
Port Said.....			
Suez.....			
Alexandria.....	July 25	<i>City of Lille</i>	McLean Kennedy
Port Sudan.....			
Finland—			
Helsinki.....	July 7-12	<i>Svaneholm</i>	Swedish American
Helsinki.....	July 22-23	<i>Polycrest</i>	Swedish American
Helsinki.....	July 27-28	<i>Erland</i>	Swedish American

Departures from Montreal—Continued

Destination	Loading Date	Vessel	Operator or Agent
France—			
Le Havre.....	July 7	<i>Kent County</i>	Canada Steamships
Le Havre.....	July 7-12	<i>Svaneholm</i>	Swedish American
Le Havre.....	July 8-14	<i>Domfront</i>	Furness Withy
Le Havre.....	July 27	<i>Hada County</i>	Canada Steamships
Le Havre.....	July 29	<i>Grey County</i>	Canada Steamships
Le Havre.....	August 16	<i>Brant County</i>	Canada Steamships
Marseilles.....	July 10-16	<i>Capo Vita</i>	Furness Withy
Marseilles.....	August 10-16	<i>Capo Arma</i>	Furness Withy
Germany—			
Hamburg.....	July 3-10	<i>Beaconsfield</i>	Cunard Donaldson
Hamburg.....	July 7-12	<i>Svaneholm</i>	Swedish American
Hamburg.....	July 14-18	<i>Westralia</i>	Montreal Shipping
Hamburg.....	August 7-14	<i>Beckenham</i>	Cunard Donaldson
Bremerhaven.....	July 8-13	<i>Beaverbrae</i>	Canadian Pacific
Gibraltar.....			
	July 19-27	<i>Mont Alta</i>	Montreal Shipping
Greece—			
Piraeus.....	July 19-27	<i>Mont Alta</i>	Montreal Shipping
Guatemala—			
Puerto Baerios.....	August 2-6	<i>Fort Panmure</i>	Saguenay Terminals
Haiti—			
Port au Prince.....	August 2-6	<i>Fort Panmure</i>	Saguenay Terminals
Port au Prince.....	September 2-5	<i>Shakespeare Park</i>	Saguenay Terminals
Hong Kong.....			
	July 5-10	<i>Lakeside</i>	March Shipping
	July 20-25	<i>Oceanside</i>	March Shipping
	August 5-10	<i>City of Poona</i>	McLean Kennedy
India and Pakistan—			
Karachi.....	July 5-10	<i>Cliffside</i>	March Shipping
Bombay.....	July 15-20	<i>City of Lille</i>	McLean Kennedy
Madras.....	July 25-30	<i>Gulfside</i>	March Shipping
Karachi.....	August 1-5 August 15-20	<i>Martha Kleppe</i> <i>City of Agra</i>	McLean Kennedy McLean Kennedy
Bombay.....			
Madras.....			
Calcutta.....			
Italy—			
Naples.....	July 19-27	<i>Mont Alta</i>	Montreal Shipping
West Coast Ports...	July 10-16 August 10-16	<i>Capo Vita</i> <i>Capo Arma</i>	Furness Withy Furness Withy
Japan—			
Yokohama.....	July 5-10	<i>Lakeside</i>	March Shipping
Malaya—			
Penang.....	July 8-14	<i>Maron</i>	Cunard Donaldson
Port Swettenham..}	July 29-Aug. 2	<i>A Ship</i>	Cunard Donaldson
Mediterranean—			
Central and Western.....	July 19-27	<i>Mont Alta</i>	Montreal Shipping
Mexico—			
Veracruz.....	July 12-13	<i>Brush</i>	Swedish American
Veracruz.....	July 16	<i>Federal Pioneer</i>	McLean Kennedy
Veracruz.....	July 20-25	<i>Sparreholm</i>	Swedish American
Netherlands—			
Amsterdam.....	July 3-10	<i>Beaconsfield</i>	Cunard Donaldson
Rotterdam.....	July 15	<i>Prins Frederik Hendrik</i>	Shipping Limited
Rotterdam.....	July 23	<i>Hedel</i>	Shipping Limited
	August 7-14	<i>Beckenham</i>	Cunard Donaldson
Rotterdam.....	July 7	<i>Kent County</i>	Canada Steamships
Rotterdam.....	July 14-18	<i>Westralia</i>	Montreal Shipping
Rotterdam.....	July 27	<i>Hada County</i>	Canada Steamships
Rotterdam.....	July 29	<i>Grey County</i>	Canada Steamships
Rotterdam.....	August 16	<i>Brant County</i>	Canada Steamships

Departures from Montreal—Continued

Destination	Loading Date	Vessel	Operator or Agent
Netherlands East Indies—			
Batavia.....	July 8-14 July 29-Aug. 2	<i>Maron</i> <i>A Ship</i>	Cunard Donaldson Cunard Donaldson
Soerabaya.....			
Samarang.....			
Cheribon.....			
Netherlands West Indies—			
Curaçao.....	July 12-13	<i>Brush</i> <i>Apollo</i> (r) <i>Benny</i> (r)	Swedish American Saguenay Terminals Saguenay Terminals
Curaçao.....	July 21-27		
Curaçao.....	August 9-12		
Newfoundland—			
St. John's.....	July 10	<i>Empire Gangway</i> <i>Wellington Kent</i> <i>Atlantic Charter</i> <i>Blue Seal</i> <i>Atlantic Charter</i> <i>Wellington Kent</i> <i>Wellington Kent</i>	Clarke Steamships Furness Withy Montreal Shipping Montreal Shipping Montreal Shipping Furness Withy Furness Withy
St. John's.....	July 12-14		
St. John's.....	July 13-15		
St. John's.....	July 16-20		
St. John's.....	July 24-25		
St. John's.....	July 26-28		
St. John's.....	August 9-11		
Corner Brook.....	July 10		
Corner Brook.....	July 12		
Corner Brook.....	July 29		
New Zealand—			
Auckland.....	July 5-12 Late August	<i>Port Jackson</i>	Montreal Australia New Zealand Line Montreal Australia New Zealand Line
Wellington.....			
Lyttelton.....		<i>Port Phillips</i>	
Dunedin.....			
Northern Ireland—			
Belfast.....	July 19-23	<i>Fanad Head</i> <i>Inishowen Head</i>	McLean Kennedy McLean Kennedy
Belfast.....	July 29-Aug. 2		
Norway—			
Oslo.....	July 7-12 July 22-23 July 27-28	<i>Svaneholm</i> <i>Polycrest</i> <i>Erland</i>	Swedish American Swedish American Swedish American
Kristiansand.....			
Stavanger.....			
Bergen.....			
Philippines—			
Manila.....	August 5-10	<i>City of Poona</i>	McLean Kennedy
Poland—			
Gdansk.....	July 7-12	<i>Svaneholm</i> <i>Westralia</i> <i>Polycrest</i> <i>Erland</i>	Swedish American Montreal Shipping Swedish American Swedish American
Gdansk.....	July 14-18		
Gdansk.....	July 22-23		
Gdansk.....	July 27-28		
Portugal—			
Lisbon.....	July 19-27	<i>Mont Alta</i>	Montreal Shipping
St. Pierre et Miquelon.....			
	July 12-14	<i>Wellington Kent</i> <i>Atlantic Charter</i> <i>Atlantic Charter</i> <i>Wellington Kent</i> <i>Wellington Kent</i>	Furness Withy Montreal Shipping Montreal Shipping Furness Withy Furness Withy
	July 13-15		
	July 24-25		
	July 26-27		
	August 9-10		
Singapore.....			
	July 5-10	<i>Cliffside</i> <i>Maron</i> <i>Oceanside</i> <i>A Ship</i>	March Shipping Cunard Donaldson March Shipping Cunard Donaldson
	July 8-14		
	July 20-25		
	July 29-Aug. 2		
Sweden—			
Gothenburg.....	July 7-12 July 22-23 July 27-28	<i>Svaneholm</i> <i>Polycrest</i> <i>Erland</i>	Swedish American Swedish American Swedish American
Malmö.....			
Norrköping.....			
Stockholm.....			
United Kingdom—			
Avonmouth.....	July 10-15	<i>Norwegian</i> <i>Dorelian</i> (r) <i>Nandi</i>	Cunard Donaldson Cunard Donaldson Furness Withy
Avonmouth.....	July 17-22		
Avonmouth.....	July 24-30		

Departures from Montreal—Continued

Destination	Loading Date	Vessel	Operator or Agent
United Kingdom—			
(Con.)			
Glasgow.....	June 30–July 8	<i>Delilian</i> (r)	Cunard Donaldson
Glasgow.....	July 8–16	<i>Laurentia</i>	Cunard Donaldson
Glasgow.....	July 26–Aug. 3	<i>Salacia</i> (r)	Cunard Donaldson
Hull.....	July 15–19	<i>Consuelo</i> (r)	McLean Kennedy
Leith.....	July 17–22	<i>Cairnvalona</i>	Furness Withy
Liverpool.....	July 3–9	<i>Arabia</i> (r)	Cunard Donaldson
Liverpool.....	July 5–9	<i>Torr Head</i>	McLean Kennedy
Liverpool.....	July 11–14	<i>Ascania</i> (r)	Cunard Donaldson
Liverpool.....	July 11–18	<i>Beaverford</i>	Canadian Pacific
Liverpool.....	July 17–21	<i>Hillcrest Park</i>	Cunard Donaldson
Liverpool.....	July 18–23	<i>Empress of Canada</i> (r)	Canadian Pacific
Liverpool.....	July 19–23	<i>Fanad Head</i>	McLean Kennedy
Liverpool.....	July 20–25	<i>Kaipaki</i>	Cunard Donaldson
Liverpool.....	July 27	<i>Beaverburn</i>	Canadian Pacific
Liverpool.....	July 29–Aug. 2	<i>Inishowen Head</i>	McLean Kennedy
London.....	July 6–14	<i>Fort Cadotte</i>	Cunard Donaldson
London.....	July 11–17	<i>Beaverdell</i> (r)	Canadian Pacific
London.....	July 14–21	<i>Vandalia</i>	Cunard Donaldson
London.....	July 15	<i>Beaverbrae</i>	Canadian Pacific
London.....	July 15–21	<i>Beaverqlen</i> (r)	Canadian Pacific
London.....	July 26–Aug. 2	<i>Asia</i> (r)	Cunard Donaldson
London.....	July 30	<i>Beaverlake</i> (r)	Canadian Pacific
London.....	August 9	<i>Beavercove</i> (r)	Canadian Pacific
Manchester.....	July 7–10	<i>Manchester Port</i> (r)	Furness Withy
Manchester.....	July 14–17	<i>Manchester Shipper</i> (r)	Furness Withy
Manchester.....	July 21–24	<i>Manchester City</i> (r)	Furness Withy
Manchester.....	July 28–31	<i>Manchester Regiment</i> (r)	Furness Withy
Newcastle.....	July 17–22	<i>Cairnvalona</i>	Furness Withy
Swansea.....	July 24–30	<i>Nandi</i>	Furness Withy
Uruguay—			
Montevideo.....	July 10–15	<i>Brazilian Prince</i>	Furness Withy
Montevideo.....	July 21–22	<i>Mormacmar</i>	Montreal Shipping
Montevideo.....	August 7–11	<i>English Prince</i>	Furness Withy
Montevideo.....	August 12–17	<i>Royal Prince</i>	Furness Withy
Venezuela—			
La Guaira.....	July 21–27	<i>Apollo</i> (r)	Saguenay Terminals
Maracaibo.....	August 9–12	<i>Benny</i> (r)	Saguenay Terminals
La Guaira.....	July 12–13	<i>Brush</i>	Swedish American
Puerto Cabello.....	September 12–13	<i>Shakespeare Park</i>	Saguenay Terminals
West Indies—			
Bermuda.....	July 6–15	* <i>Alcoa Pegasus</i>	Alcoa Steamships
	July 7–15	<i>Canadian Cruiser</i> (r)	Canadian National
	July 20–29	* <i>A Ship</i>	Alcoa Steamships
	July 21–29	<i>Canadian Challenger</i> (r)	Canadian National
	August 3–12	* <i>Alcoa Pennant</i> (r)	Alcoa Steamships
	August 10–17	* <i>Canadian Constructor</i> (r)	Canadian National
	Aug. 27–Sept. 3	<i>Canadian Cruiser</i> (r)	Canadian National
Antigua.....	July 6–15	* <i>Alcoa Pegasus</i>	Alcoa Steamships
Barbados.....	July 7–15	<i>Canadian Cruiser</i> (r)	Canadian National
Grenada.....	July 20–29	* <i>A Ship</i>	Alcoa Steamships
St. Kitts.....	July 21–29	<i>Canadian Challenger</i> (r)	Canadian National
St. Lucia.....	August 3–12	* <i>Alcoa Pennant</i> (r)	Alcoa Steamships
St. Vincent.....	August 10–17	* <i>Canadian Constructor</i> (r)	Canadian National
Trinidad.....	Aug. 27–Sept. 3	<i>Canadian Cruiser</i> (r)	Canadian National
Dominica.....	July 6–15	* <i>Alcoa Pegasus</i>	Alcoa Steamships
	July 7–15	<i>Canadian Cruiser</i> (r)	Canadian National
	July 20–29	* <i>A Ship</i>	Alcoa Steamships
	July 21–29	<i>Canadian Challenger</i> (r)	Canadian National
	August 3–12	* <i>Alcoa Pennant</i> (r)	Alcoa Steamships
	August 10–17	* <i>Canadian Constructor</i> (r)	Canadian National
	Aug. 27–Sept. 3	<i>Canadian Cruiser</i>	Canadian National
Jamaica.....	July 20–25	<i>Sparreholm</i>	Swedish American

Departures from Montreal—Concluded

Destination	Loading Date	Vessel	Operator or Agent
West Indies—(Con.) Bahamas..... Jamaica.....	July 14	<i>Canadian Conqueror</i>	Canadian National
	July 24	<i>Canadian Highlander</i>	Canadian National
	July 31	<i>Canadian Observer</i>	Canadian National
	August 10	<i>Canadian Victor</i>	Canadian National
	August 18	<i>Canadian Leader</i>	Canadian National
	August 24	<i>Canadian Conqueror</i>	Canadian National
British Guiana.....	July 6-15	* <i>Alcoa Pegasus</i>	Alcoa Steamships
	July 7-15	<i>Canadian Cruiser (r)</i>	Canadian National
	July 20-29	* <i>A Ship</i>	Alcoa Steamships
	July 21-29	<i>Canadian Challenger (r)</i>	Canadian National
	August 3-12	* <i>Alcoa Pennant (r)</i>	Alcoa Steamships
	August 10-17 Aug. 27-Sept. 3	* <i>Canadian Constructor (r)</i> <i>Canadian Cruiser (r)</i>	Canadian National Canadian National

Departures from Quebec

Destination	Loading Date	Vessel	Operator or Agent
Argentina— Buenos Aires..... Buenos Aires.....	July 21-22	<i>Brazilian Prince</i>	Furness Withy
	August 11-12	<i>Royal Prince</i>	Furness Withy
Brazil— Rio de Janeiro..... Santos.....	July 21-22	<i>Brazilian Prince</i>	Furness Withy
	August 11-12	<i>Royal Prince</i>	Furness Withy
Netherlands— Amsterdam..... Rotterdam.....	July 16-18	<i>Kota Inten</i>	Furness Withy
	July 31-Aug. 1	<i>Tabinta</i>	Furness Withy
Uruguay— Montevideo..... Montevideo.....	July 21-22	<i>Brazilian Prince</i>	Furness Withy
	August 11-12	<i>Royal Prince</i>	Furness Withy

Departures from Halifax

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

Destination	Loading Date	Vessel	Operator or Agent
Cuba— Havana..... Santiago..... Santiago.....	July 7-8	<i>Danaholm</i>	Swedish American
	July 8-10	* <i>Lake Traverse</i>	Pickford and Black
Iceland— Reykjavik.....	July 13-15	<i>Trollafoss</i>	F. K. Warren
Mexico— Veracruz.....	July 7-8	<i>Danaholm</i>	Swedish American
Newfoundland— St. John's..... St. John's..... St. John's..... St. John's..... St. John's..... St. John's..... St. John's..... St. John's..... St. John's..... St. John's.....	July 12-14	<i>Mary Sweeney</i>	Newfoundland Canada
	July 14-15	<i>Atlantic Charter</i>	Montreal Shipping
	July 16-19	<i>Fort Amherst</i>	Furness Withy
	July 20-23	<i>Nova Scotia</i>	Furness Withy
	July 23-26	<i>Fort Townshend</i>	Furness Withy
	July 24-25	<i>Atlantic Charter</i>	Montreal Shipping
	July 26-28	<i>Mary Sweeney</i>	Newfoundland Canada
	August 3-6	<i>Newfoundland</i>	Furness Withy
	July 6-8	<i>Mary Sweeney</i>	Newfoundland Canada
	July 19-21	<i>Mary Sweeney</i>	Newfoundland Canada
St. Pierre et Miquelon.....	July 13-15	<i>Atlantic Charter</i>	Montreal Shippi g
	July 24-25	<i>Atlantic Charter</i>	Montreal Shippi g

Departures from Halifax—Concluded

Destination	Loading Date	Vessel	Operator or Agent
United Kingdom—			
Liverpool.....	July 20-23	<i>Nova Scotia</i>	Furness Withy
Liverpool.....	August 3-6	<i>Newfoundland</i>	Furness Withy
Southampton.....	July 15	<i>Aquitania</i>	Cunard Doanldson
Southampton.....	August 6	<i>Aquitania</i>	Cunard Donaldson
Southampton.....	August 27	<i>Aquitania</i>	Cunard Donaldson
West Indies—			
Bermuda.....	(July 8-16	* <i>Lady Nelson</i> (r)	Canadian National
	July 16-27	* <i>Lady Rodney</i> (r)	Canadian National
	July 23-26	<i>Fort Amherst</i>	Furness Withy
	August 22-31	* <i>Lady Nelson</i> (r)	Canadian National
Jamaica.....	(September 4-12	* <i>Lady Rodney</i> (r)	Canadian National
	(July 7-8	<i>Danaholm</i>	Swedish American
Antigua.....	(July 8-10	* <i>Lake Traverse</i>	Pickford and Black
	Barbados.....		
Grenada.....	July 8-16	* <i>Lady Nelson</i> (r)	Canadian National
St. Kitts.....	July 16-27	* <i>Lady Rodney</i> (r)	Canadian National
St. Lucia.....	August 22-31	* <i>Lady Nelson</i> (r)	Canadian National
St. Vincent.....	September 4-12	* <i>Lady Rodney</i> (r)	Canadian National
Trinidad.....			
Dominica.....	(July 8-16	* <i>Lady Nelson</i> (r)	Canadian National
Montserrat.....	July 16-27	* <i>Lady Rodney</i> (r)	Canadian National
	August 22-31	* <i>Lady Nelson</i> (r)	Canadian National
	(September 4-12	* <i>Lady Rodney</i> (r)	Canadian National
British Guiana.....	(July 8-16	* <i>Lady Nelson</i> (r)	Canadian National
	July 16-27	* <i>Lady Rodney</i> (r)	Canadian National
	August 22-31	* <i>Lady Nelson</i> (r)	Canadian National
	(September 4-12	* <i>Lady Rodney</i> (r)	Canadian National

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..	(July 19	<i>Silverwalnut</i> (r)	Dingwall Cotts	
	August 11	<i>Overijsel</i>	Dingwall Cotts	
Beira.....	September	<i>Silversandal</i>	Dingwall Cotts	
Africa-South—				
Cape Town.....	July 19	<i>Silverwalnut</i> (r)	Dingwall Cotts	
				Port Elizabeth.....
				East London.....
Durban.....	September	<i>Silversandal</i>	Dingwall Cotts	
Argentina				
Buenos Aires.....	July 31	<i>Siranger</i>	Empire Shipping	
Rosario.....				
Australia—				
Sydney.....	July 20	<i>Helmspey</i>	Canadian Australasian	
Sydney.....	July 14-16	<i>Nimbus</i>	Empire Shipping	
Melbourne.....				
Adelaide.....				
Adelaide.....	Early August	<i>Wangaratta</i>	Empire Shipping	
Belgium—				
Antwerp.....	July 8	<i>Magnolia State</i>	Anglo Canadian	
Antwerp.....	July 10	<i>Seattle</i> (r)	Gardner Johnson	
Antwerp.....	August 2	<i>Paraguay</i> (r)	Gardner Johnson	
Antwerp.....	August 15	<i>Brest</i>	Empire Shipping	

Departures from Vancouver—Continued

Destination	Loading Date	Vessel	Operator or Agent
Ceylon—			
Colombo.....	July 9-10	<i>Island Mail (r)</i>	American Mail Line
Colombo.....	July 10	<i>Höegh Silverspray</i>	Dingwall Cotts
Colombo.....	July 18	<i>Saparoea</i>	Dingwall Cotts
Colombo.....	July 26	<i>Borneo</i>	Dingwall Cotts
Colombo.....	August 10	<i>Japara</i>	Dingwall Cotts
Colombo.....	August 16-17	<i>Washington Mail</i>	American Mail Line
Colombo.....	August 18	<i>Silverguava</i>	Dingwall Cotts
Chile—			
Valparaiso.....	July 31	<i>Siranger</i>	Empire Shipping
China—			
Shanghai.....	July 20-21	<i>American Mail</i>	American Mail Line
Tsingtao.....			
Taku Bar.....	August 20-21	<i>India Mail</i>	American Mail Line
Shanghai.....	August 4-5	<i>Narrandera</i>	Empire Shipping
Taku Bar.....			
Shanghai.....	July 30-31	<i>Canada Mail</i>	American Mail Line
Shanghai.....	August 12-13	<i>Oregon Mail (r)</i>	American Mail Line
Colombia—			
Barranquilla.....	July 24	<i>Don Aurelio (r)</i>	Empire Shipping
Buenaventura.....			
Fiji Islands—			
Suva.....	August 7	<i>Thor I</i>	Empire Shipping
France—			
Le Havre.....	July 8	<i>Magnolia State</i>	Anglo Canadian
Le Havre.....	August 15	<i>Brest</i>	Empire Shipping
Germany—			
Bremen.....	July 8	<i>Magnolia State</i>	Anglo Canadian
Hamburg.....			
Greece—			
Piraeus.....	Mid-July	<i>George D. Gratsos</i>	Empire Shipping
Piraeus.....	Mid-August	<i>A Ship</i>	Empire Shipping
Hong Kong.....	(July 14	<i>Castleville</i>	Balfour Guthrie
	July 20-21	<i>American Mail</i>	American Mail Line
	July 30-31	<i>Canada Mail</i>	American Mail Line
	August 14	<i>Francisville</i>	Balfour Guthrie
	August 20-21	<i>India Mail</i>	American Mail Line
India and Pakistan—			
Bombay.....	July 10	<i>Höegh Silverspray</i>	Dingwall Cotts
Karachi.....	August 10		Dingwall Cotts
Karachi.....	August 18		Dingwall Cotts
Bombay.....	July 26	<i>Borneo</i>	Dingwall Cotts
Madras.....			
Calcutta.....			
Madras.....	July 9-10	<i>Island Mail</i>	American Mail Line
Calcutta.....	July 18	<i>Saparoea</i>	Dingwall Cotts
Calcutta.....	August 6-7	<i>Washington Mail</i>	American Mail Line
Calcutta.....	September 5	<i>Höegh Merchant</i>	Dingwall Cotts
Italy—			
Genoa.....	Mid-July	<i>George D. Gratsos</i>	Empire Shipping
Naples.....	Mid-August		<i>A Ship</i>	Empire Shipping
Japan—			
Yokohama.....	July 18-24	<i>Lake Winnipeg</i>	Empire Shipping
Yokohama.....	July 20-21	<i>American Mail</i>	American Mail Line
Yokohama.....	July 30-31	<i>Canada Mail</i>	American Mail Line
Yokohama.....	August 12-13	<i>Oregon Mail (r)</i>	American Mail Line
Yokohama.....	August 13-19	<i>Lake Kootenay</i>	Anglo Canadian
Yokohama.....	August 19-25	<i>Lake Sumas</i>	Canada Shipping
Yokohama.....	August 19-25	<i>Lake Athabasca</i>	Anglo Canadian
Yokohama.....	August 19-25	<i>Lake Pennask</i>	Anglo Canadian
Yokohama.....	August 20-21	<i>India Mail</i>	American Mail Line

Departures from Vancouver—Concluded

Destination	Loading Date	Vessel	Operator or Agent
Malaya— Penang..... Port Swettenham...	July 9-10	<i>Island Mail</i> (r)	American Mail Line
	July 14	<i>Castleville</i>	Balfour Guthrie
	July 18	<i>Saporoea</i>	Dingwall Cotts
	August 6-7	<i>Washington Mail</i>	American Mail Line
	August 14	<i>Francisville</i>	Balfour Guthrie
	August 18	<i>Silverguava</i>	Dingwall Cotts
Morocco— Casablanca.....	Mid-July..	<i>George D. Gratsos</i>	Empire Shipping
Netherlands— Rotterdam.....	July 8	<i>Magnolia State</i>	Anglo Canadian
	August 15	<i>Brest</i>	Empire Shipping
New Caledonia— Noumea.....	August 7	<i>Thor I</i>	Empire Shipping
New Zealand— Auckland..... Wellington.....	July 27	<i>Helmspey</i>	Canadian Australasian
Persian Gulf.....	July 10	<i>Høegh Silverspray</i>	Dingwall Cotts
	July 15	<i>Lawak</i>	Dingwall Cotts
	August 10	<i>Japara</i>	Dingwall Cotts
Philippines— Manila..... Iloilo..... Cebu.....	July 9-10	<i>Island Mail</i> (r)	American Mail Line
	July 14	<i>Castleville</i>	Balfour Guthrie
	July 20-21	<i>American Mail</i>	American Mail Line
	July 30-31	<i>Canada Mail</i>	American Mail Line
	August 6-7	<i>Washington Mail</i>	American Mail Line
	August 12-13	<i>Oregon Mail</i> (r)	American Mail Line
	August 14	<i>Francisville</i>	American Mail Line
Manila.....	August 4-5	<i>Narrandera</i>	Empire Shipping
Manila..... Cebu.....	July 10	<i>Høegh Silverspray</i>	Dingwall Cotts
	July 18	<i>Saporoea</i>	Dingwall Cotts
	July 26	<i>Borneo</i>	Dingwall Cotts
	August 10	<i>Japara</i>	Dingwall Cotts
	August 18	<i>Silverguava</i>	Dingwall Cotts
Manila..... Iloilo.....	September 5	<i>Høegh Merchant</i>	Dingwall Cotts
Singapore.....	July 9-10	<i>Island Mail</i> (r)	American Mail Line
	July 14	<i>Castleville</i>	Balfour Guthrie
	July 18	<i>Saporoea</i>	Dingwall Cotts
	August 6-7	<i>Washington Mail</i>	American Mail Line
	August 14	<i>Francisville</i>	Balfour Guthrie
Society Islands— Papeete..... Papeete.....	July 29	<i>Helmspey</i>	Canadian Australasian
	August 7	<i>Thor I</i>	Empire Shipping
Sweden— Stockholm..... Gothenburg.....	August 2	<i>Paraguay</i> (r)	Gardner Johnson
United Kingdom— Liverpool..... Manchester..... Liverpool..... London..... London..... London..... London..... London..... London..... London.....	Early August	<i>Pacific Enterprise</i>	Furness Withy
	July 8	<i>Magnolia State</i>	Anglo Canadian
	June 27-July 15	<i>Lake Canim</i>	Anglo Canadian
	July 9-14	<i>Lake Tatla</i>	Canada Shipping
	July 10	<i>Seattle</i> (r)	Gardner Johnson
	August 1-6	<i>Lake Cowichan</i>	Anglo Canadian
	Aug. 18-Sept. 1	<i>Lake Nipigon</i>	Empire Shipping
	August 2	<i>Paraguay</i> (r)	Gardner Johnson
	August	<i>Corrientes</i>	Balfour Guthrie
	Uruguay— Montevideo.....	July 21	<i>Siranger</i>	Empire Shipping

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.

Buenos Aires—W. B. McCULLOUGH, Commercial Secretary (Agricultural Specialist), Canadian Embassy, Bartolomé Mitre 478.

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.

Sydney—Dr. W. C. HOPPER, Commercial Secretary for Canada (Agricultural Specialist). City Mutual Building, Hunter and Bligh Streets. Address for letters: Post Office Box 3952V.

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, Forescom Building. 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. Metropole, 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—E. H. MAGUIRE, Acting Commercial Secretary, Canadian Embassy, Bank of London and South American 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 Sharia Kasr el Nil. Address for letters: Post Office Box 1770.

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

France

Paris—J. P. MANION, Commercial Secretary, Canadian Embassy, 3 rue Scribe. Territory includes Algeria, French Morocco and Tunisia.

Paris—J. H. TREMBLAY, Commercial Secretary (Agricultural Specialist), Canadian Embassy, 3 rue Scribe.

Territory includes Belgium, Denmark, France and the Netherlands.

Germany

Frankfurt—B. J. BACHAND, Canadian Economic Representative, % Allied Contact Section, H.Q. EUCOM, Frankfurt, A.P.O. 757, U.S. Army.

Cable address, *Canadian Frankfurt/Main*.

Foreign Trade Service Abroad—Continued

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

New Delhi—RICHARD GREW, Commercial Secretary, Office of the High Commissioner for Canada, Post Office Box 114.

Bombay—C. R. GALLOW, 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—A. P. BISSONNET, Acting Commercial Secretary, Canadian Legation, via Saverio Mercadante 15-17. Address for letters: Casella Postale 475. (Telephones—471-597 and 470-708.)

Territory includes Malta, Yugoslavia and Libya.

Jamaica

Kingston—R. V. N. GORDON, Acting Canadian Government Trade Commissioner, Canadian Bank of Commerce Chambers. Address for letters: Post Office Box 225.

Territory includes the Bahamas and British Honduras.

Mexico

Mexico City—D. S. COLE, Commercial Counsellor, Canadian Embassy, Edi-

ficio 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—R. CAMPBELL SMITH, 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, The Cotton Exchange, McLeod Road. Address for letters: Post Office Box 531. Territory includes Afghanistan.

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.

Singapore

Singapore—PAUL SYKES, Canadian Government Trade Commissioner, Room D-2, Union Building. Address for letters: Post Office Box 845.

Territory includes Federation of Malaya, North Borneo, Brunei, Sarawak, Siam and Netherlands East Indies.

Foreign Trade Service Abroad—Concluded

South Africa

Johannesburg—S. V. ALLEN, Commercial Secretary 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, Kenya, Nyasaland, Tanganyika and Uganda.

Cable address, Cantracom.

Cape Town—S. G. TREGASKES, Acting 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.

Switzerland

Berne — YVES LAMONTAGNE, Commercial Counsellor, Canadian Legation, Thunstrasse 95.

Territory includes Austria, Czechoslovakia and Hungary.

Trinidad

Port-of-Spain—A. W. EVANS, Acting 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.

London—W. B. GORNALL, Commercial Secretary (Agricultural Specialist), Office of the High Commissioner for Canada, Canada House, Trafalgar Square, S.W.1.

Cable address, Cantracom, London.

London—R. D. ROE, Commercial Secretary (Timber Specialist), Office of the High Commissioner for Canada, Canada House, Trafalgar Square, S.W.1.

Cable address, Timcom, 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—J. H. ENGLISH, Commercial Counsellor, Canadian Embassy, 1746 Massachusetts Avenue, N.W.

Washington—G. R. PATERSON, Agricultural 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.

Chicago—EDMOND TURCOTTE, Consul-General for Canada, Suite 800, Chicago Daily News Building, 400 West Madison Street.

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. Address for letters: Canadian Consulate General, 8° Piso, Edificio America, 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 June 21	Nominal Quotations June 28
Argentina.....	Peso	Off.	·2977	·2977
		Free	·2495	·2075
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	Off.	·0046	·0046
		Free	·0032	·0032
French Empire—African.....	Franc	....	·0079	·0079
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
Malaya.....	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.....	Pound	....	·3571	·3571
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