FOREIGN TRADE

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In This Issue

Regular Features

COVER SUBJECT—British aircraft carrier loading grain in Halifax, from which 7,459,750 bushels were shipped during the past year, compared with 7,183,720 bushels in 1947. This port, which is open the year round and approached directly from the ocean by a channel with a minimum depth of fifty feet at low tide, has a 2,200,000-bushel elevator maintained by the National Harbours Board. Its loading capacity is 75,000 bushels an hour.

National Film Board Photo.

Canadian Commodity Trade Well Over Five-Billion-Dollar Mark

Imports, valued at $2,636·9 millions last year, were highest on record—Value of exports reached peacetime peak of $3,075·4 millions — Purchases from United Kingdom increased substantially, and favourable trade balance reduced to lowest figure since 1940.

CANADA'S commodity trade with all countries during the past year was valued at $5,747 millions, which is the highest figure on record. The five-billion-dollar mark was passed in 1944 and again in 1947, but the upward trend was carried still further in 1948. While the value of Canadian exports, amounting to $3,075·4 millions, was exceeded in 1944 and 1945, that of Canadian imports rose to a new peak of $2,636·9 millions. With foreign exports of $34·6 millions, a favourable balance of trade with all countries of $473·1 millions was achieved.

Of particular significance at this time are the large purchases by Canada from the United Kingdom, which contributed goods valued at $299·5 million to the total, this being a new record in the history of Canada's trade with that country. Exports to Great Britain declined in value from the peacetime peak reached in 1947. On balance, however, this Dominion is in a favourable position on the basis of commodity exports and imports. The figures issued by the Dominion Bureau of Statistics do not indicate the value of shipments for which payment was authorized by the Economic Co-operation Administration, in Washington. Nor does this favourable balance with the United Kingdom take into consideration credits made available by this country to Great Britain. The gap between exports and imports has been narrowed, and at $389·2 millions is the shortest since 1940, when Canada's favourable trade balance with the United Kingdom was $386·9 millions.

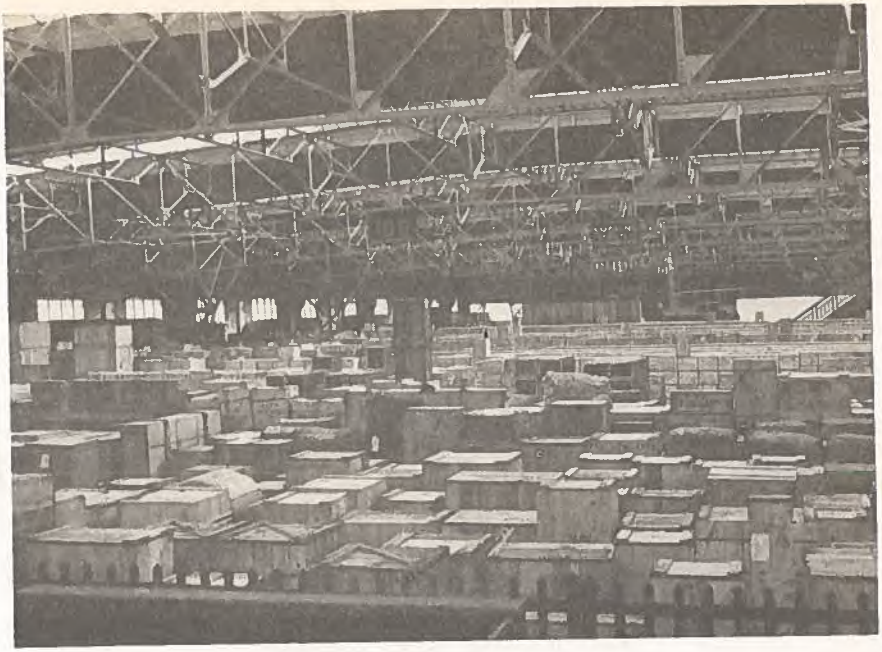
Canadian Trade with United States Sets Record

Canada's total trade with the United States was valued at $3,327·9 millions, which represents a new record. Exports to that country rose to a peak of $1,501·0 millions, compared with $1,034·2 millions in 1947, but imports were slightly lower, the respective figures being $1,805·8 millions and $1,974·7 millions. The unfavourable balance of trade with the United States was lowered last year to $283·6 millions from $918·1 millions in 1947.

Countries from which Canada imported substantially more goods last year than in 1947 are: Newfoundland, Jamaica, Trinidad, British Guiana, Gold Coast, Nigeria, British East Africa, Aden, Singapore and the Federation of Malaya, Australia, Fiji, Puerto Rico, Brazil, Costa Rica, Mexico,

Canadian Trade with all Countries

	Average 1935-39	1938	1943	1944	1945	1946	1947	1948
Imports for consumption ...	684.6	677.5	1,735.1	1,758.9	1,585.8	1,927.3	2,573.9	2,636.9
Domestic exports	884.5	837.6	2,971.5	3,440.0	3,218.3	2,312.2	2,774.9	3,075.4
Foreign exports	12.5	11.1	29.9	43.1	49.1	27.0	36.9	34.6
Total trade .	1,581.6	1,526.1	4,736.4	5,242.0	4,853.2	4,266.4	5,385.7	5,747.0
Balance of trade .	+ 212.5	+ 171.2	+1,266.3	+1,724.2	+1,681.6	+ 411.9	+ 237.8	+ 473.1



Great Britain—Export cargo in transit shed at Southampton.
Southern Railway Photo.

Peru, Dominican Republic, Venezuela, Belgium, Czechoslovakia, Denmark, France, Germany, Italy, the Netherlands, China, Egypt, Indonesia and Japan.

On the basis of trade returns, Canada purchased substantially less goods last year from the following countries: Barbados, India and Pakistan, Argentina, Guatemala, Norway, Sweden, Iraq, the Netherlands Antilles, the Philippines and Turkey.

Canadian Trade with United States

	Average 1935-39	1938	1943	1944	1945	1946	1947	1948
Imports for consumption ...	418.7	424.7	1,423.7	1,447.2	1,202.4	1,405.3	1,974.7	1,805.8
Domestic exports	321.3	270.5	1,149.2	1,301.3	1,197.0	887.9	1,034.2	1,501.0
Foreign exports	10.4	8.3	17.4	33.2	30.5	20.6	22.4	21.2
Total trade	750.5	703.5	2,590.3	2,781.8	2,429.9	2,313.9	3,031.3	3,327.9
Balance of trade	− 87.0	− 146.0	− 257.0	− 112.7	+ 25.0	− 496.7	− 918.1	− 283.6

Canadian Trade with United Kingdom

	Average 1935-39	1938	1943	1944	1945	1946	1947	1948
Imports for consumption ..	124.0	119.3	135.0	110.6	140.5	201.4	189.4	299.5
Domestic exports	353.6	339.7	1,032.6	1,235.0	963.2	597.5	751.2	686.9
Foreign exports	1.1	1.7	4.6	3.0	8.2	1.3	2.5	1.8
Total trade .	478.9	460.7	1,172.2	1,348.7	1,112.0	800.2	943.0	988.2
Balance of trade.	+ 230.8	+ 222.1	+ 902.3	+1,127.5	+ 830.9	+ 397.4	+ 564.3	+ 389.2

Canadian Imports, by Areas

Country	December 1938	December 1947	December 1948	January—December 1938	January—December 1947	January—December 1948
COMMONWEALTH COUNTRIES	(Millions of Dollars)					
United Kingdom and Europe	7·0	20·3	24·6	119·3	189·5	299·6
America	1·0	4·0	3·0	22·5	43·0	53·4
Africa	0·6	1·7	0·4	4·8	20·8	28·6
Asia	1·7	5·7	6·6	23·5	71·9	75·3
Oceania	1·0	3·0	5·9	16·0	29·2	47·3
TOTAL COMMONWEALTH COUNTRIES	11·3	34·7	40·5	186·1	354·4	504·1
FOREIGN COUNTRIES						
United States and Possessions	29·2	141·9	159·7	425·0	1,976·4	1,809·5
Latin America	0·6	11·6	16·9	16·0	159·1	221·3
Europe	2·3	3·4	12·8	39·9	57·6	71·4
Other Foreign	0·9	2·6	2·1	10·5	26·4	30·7
Total Foreign Countries	33·0	159·5	191·5	491·4	2,219·6	2,132·8
TOTAL IMPORTS FOR CONSUMPTION	44·3	194·2	232·0	677·5	2,573·9	2,636·9

Canadian Imports, by Countries

Country	December 1938	December 1947	December 1948	January—December 1938	January—December 1947	January—December 1948
COMMONWEALTH COUNTRIES	(Thousands of Dollars)					
Europe:						
United Kingdom	7,033	20,254	24,633	119,292	189,370	299,502
Ireland	1	3	9	27	76	85
Gibraltar	....	....	....	....	....	....
Malta	....	....	1	2	12	5
Total Europe	7,034	20,257	24,643	119,321	189,458	299,592
America:						
Newfoundland	67	396	793	2,194	9,427	11,091
Bermuda	2	3	27	69	57	139
Barbados	90	120	206	2,132	7,776	6,387
Jamaica	159	888	456	6,192	6,371	9,557
Trinidad and Tobago	50	444	36	2,352	5,654	9,027
Bahamas	108	94	208	2,383	615	648
Leeward and Windward Islands		27	14		199	308
British Honduras	33	47	196	102	584	834
British Guiana	449	1,978	1,053	7,113	12,358	15,380
Falkland Islands	....	....	....	....	....	....
Total America	958	3,997	2,989	22,537	43,041	53,371
Africa:						
Northern Rhodesia		1	4		29	19
Union of South Africa	480	414	293	1,991	4,228	3,816
Other British South Africa		....	....		....	....
Southern Rhodesia	....	7	3	3	181	484
Gambia	....	....	....	....	....	....
Gold Coast	2	7	2	631	6,493	9,751
Nigeria	....	....	....	362	2,149	4,939

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

Canadian Imports, by Countries—*Continued*

Country	December			January—December		
	1938	1947	1948	1938	1947	1948
	(Thousands of Dollars)					
COMMONWEALTH COUNTRIES—Conc.						
Sierra Leone	....	1	....	11	18	5
Other British West Africa	....	....	....	....	....	....
British Sudan	....	6	2	27	26	36
British East Africa	95	1,293	52	1,735	7,683	9,543
Total Africa	577	1,729	356	4,760	20,807	28,593
Asia:						
India	611	2,293	2,131	8,181	42,250	33,400
Pakistan			135			1,306
Burma*	6	....	....	273	3	....
Ceylon	292	1,263	829	3,679	11,653	11,182
Aden	....	....	1,706	9	....	5,531
British Malaya	722	1,939	1,579	10,278	16,908	21,878
Other British East Indies	5	29	....	127	30	52
Hong Kong	77	159	202	785	982	1,866
Palestine	2	1	17	131	31	49
Total Asia	1,715	5,684	6,599	23,463	71,857	75,264
Oceania:						
Australia	667	1,225	4,564	9,044	14,222	27,415
New Zealand	127	710	216	4,562	10,831	11,603
Fiji	162	1,090	1,156	2,394	4,178	8,275
Other Oceania	....	....	....	16	....	....
Total Oceania	956	3,025	5,936	16,016	29,231	47,293
TOTAL COMMONWEALTH COUNTRIES	11,240	34,693	40,523	186,099	354,394	504,114
FOREIGN COUNTRIES						
United States and Possessions:						
United States	29,188	141,663	159,395	424,731	1,974,679	1,805,763
Alaska	23	48	152	102	744	1,323
American Virgin Islands	....	5	10	....	16	46
Guam	....	....	....	....	....	....
Hawaii	6	126	35	145	709	796
Puerto Rico	....	65	107	6	270	1,583
Total United States and Possessions	29,217	141,907	159,699	424,984	1,976,418	1,809,511
Latin America:						
Argentina	64	292	240	2,149	17,961	5,746
Bolivia	....	....	....	8	8	....
Brazil	52	964	1,818	769	13,888	20,559
Chile	44	27	7	179	339	332
Colombia	154	641	1,070	6,903	9,197	8,668
Costa Rica	1	120	64	76	727	3,109
Cuba	35	1,238	3,311	440	23,751	22,606
Dominican Republic	....	708	397	....	8,186	17,270
Ecuador	2	32	48	28	207	889
Guatemala	5	680	699	85	9,488	8,209
Hayti	....	4	25	62	227	176
Honduras	....	287	510	38	6,999	6,182
Mexico	23	2,353	1,213	576	16,980	27,258
Nicaragua	....	....	1	....	87	172
Panama	....	23	22	16	2,107	1,226
Paraguay	....	10	9	59	232	230
Peru	150	37	176	3,005	407	1,989
Salvador	1	49	17	17	1,342	1,166
Uruguay	4	11	9	137	321	714
Venezuela	48	4,103	7,252	1,469	46,688	94,758
Total Latin America	583	11,579	16,888	16,016	159,142	221,259

*See Foreign Countries from January 1, 1948.

Country	December			January—December		
	1938	1947	1948	1938	1947	1948
FOREIGN COUNTRIES—Concluded	(Thousands of Dollars)					
Europe:						
Albania	...	...	...	2	...	...
Austria	...	8	12	83	89	281
Belgium	457	337	1,833	6,181	10,120	13,661
Bulgaria	...	...	...	...	...	...
Czecholsovakia	55	167	416	2,528	3,645	4,809
Denmark	9	341	7,248	174	1,455	9,585
Estonia	1	...	...	20	...	4
Finland	4	1	9	68	30	39
France	473	688	1,054	6,105	8,755	12,648
Germany	448	14	125	9,930	498	1,729
Greece	2	9	5	29	95	144
Hungary	12	...	5	161	50	103
Iceland	...	...	36	3	30	76
Italy	195	279	381	2,631	3,872	6,981
Latvia	2	...	...	15	...	1
Lithuania	...	...	...	...	...	2
Netherlands	218	138	554	3,756	3,530	5,831
Norway	52	33	61	733	4,999	1,103
Poland	20	...	1	261	3	22
Portugal	28	68	62	272	1,409	1,177
Azores and Madeira	15	34	14	179	655	364
Roumania	6	...	...	44	1	19
Soviet Union	4	...	...	257	181	4
Spain	47	286	209	793	3,003	2,586
Sweden	89	270	235	2,114	3,184	2,763
Switzerland	193	681	509	3,488	11,941	7,444
Yugoslavia	14	...	1	64	23	5
Total Europe	2,344	3,354	12,770	39,891	57,568	71,381
Other Foreign Countries:						
Abyssinia	...	...	7	2	9	38
Afghanistan	...	...	...	...	...	...
Belgian Congo	...	36	24	1	815	1,644
Burma*	...	...	...	...	...	6
China	178	86	146	2,466	2,304	3,912
Greenland	...	...	...	512	...	...
Egypt	17	...	9	547	205	1,490
French Africa	5	...	...	65	252	112
French East Indies	7	...	...	218	1	9
French Guiana	...	...	...	...	...	...
French Oceania	...	...	...	1	18	...
French West Indies	...	...	6	1	19	57
Madagascar	2	...	2	36	18	28
St. Pierre and Miquelon	...	3	3	10	15	11
Iraq	108	654	...	303	1,502	799
Tripoli	...	...	...	...	...	...
Other Italian Africa	...	...	...	...	3	...
Indonesia	51	19	16	786	200	2,261
Japan	471	192	1,152	4,643	350	3,144
Korea	...	...	...	1	...	...
Liberia	10	...	...	38	25	7
Morocco	2	1	15	69	36	346
Netherlands Antilles	...	1,084	477	...	8,648	7,286
Netherlands Guiana	...	24	43	...	519	873
Iran	12	...	5	84	299	959
Philippine Islands	11	459	84	386	8,063	6,442
Portuguese Africa	...	17	...	1	392	77
Portuguese Asia	...	...	...	2	...	...
Siam	...	...	...	10	28	79
Canary Islands	1	...	2	14	2	7
Spanish Africa	...	...	...	...	...	...
Syria	1	2	2	13	30	28
Turkey	25	42	120	251	2,672	1,064
Total Other Foreign	901	2,619	2,113	10,460	26,425	30,679
TOTAL FOREIGN COUNTRIES	33,046	159,461	191,470	491,353	2,219,550	2,132,831
TOTAL IMPORTS	44,286	194,154	231,993	677,451	2,573,944	2,636,945

*See British Countries prior to 1948.

Canadian Imports, by Commodities

Commodity	December 1938	December 1947	December 1948	January—December 1938	January—December 1947	January—December 1948
	(Millions of Dollars)					
Main Groups—						
Agricultural, Vegetable Products	8·9	28·5	35·0	125·1	356·3	349·9
Animals and Animal Products	1·4	5·4	15·0	25·2	86·9	84·7
Fibres, Textiles and Products	5·5	28·8	28·3	87·4	390·6	350·6
Wood, Wood Products and Paper	2·4	5·4	6·3	32·1	89·5	73·7
Iron and Products	11·3	59·0	66·9	162·6	762·4	782·3
Non-Ferrous Metals and Products	2·6	11·1	14·1	38·4	160·9	155·8
Non-Metallic Minerals, Products	6·7	37·6	46·2	121·7	452·2	606·2
Chemicals and Allied Products	2·2	8·6	10·3	35·2	113·1	118·4
Miscellaneous Commodities	3·3	9·9	9·9	49·6	162·1	115·3
TOTAL IMPORTS FOR CONSUMPTION	44·3	194·2	232·0	677·5	2,573·9	2,636·9
	(Thousands of Dollars)					
Agricultural, Vegetable Products—						
Fruits	1,481	5,055	6,349	20,948	77,477	59,561
Nuts	248	1,471	3,820	3,499	22,050	31,027
Vegetables	411	693	925	6,051	24,822	7,523
Grains and products	1,248	4,205	5,110	17,274	36,453	30,565
Sugar and products	1,231	5,305	5,738	20,581	57,420	71,752
Cocoa and chocolate	161	28	695	2,065	7,415	16,460
Coffee and chicory	290	1,619	2,257	3,932	14,382	23,914
Tea	717	2,105	1,454	9,570	20,655	17,739
Beverages, alcoholic	1,023	1,765	2,583	6,970	13,727	15,692
Gums and resins	91	440	818	1,404	6,183	6,214
Oils, vegetable	404	970	781	11,870	25,642	20,912
Rubber and products	986	2,753	2,784	11,290	28,730	31,607
Tobacco	196	236	275	2,251	3,184	3,170
Vegetable products, other	395	1,831	1,455	7,418	18,139	13,784
TOTAL	8,880	28,478	35,043	125,121	356,278	349,919
Animals and Animal Products—						
Fish and fishery products	171	463	383	2,491	5,073	5,520
Furs and products	277	2,066	2,903	5,651	22,451	24,568
Hides and skins, raw	259	824	828	2,936	12,011	8,351
Leather, unmanufactured	192	520	400	2,612	6,574	4,985
Leather, manufactured	92	433	337	2,352	7,459	5,425
Animal oils, fats, greases	62	112	699	938	13,728	11,872
Animals and products, other	309	977	9,450	8,247	19,613	23,981
Total	1,363	5,395	14,999	25,227	86,909	84,702
Fibres, Textiles and Products—						
Cotton, raw and linters	924	6,722	6,000	13,237	60,481	56,829
Cotton products	1,025	5,647	6,176	16,298	119,413	78,518
Flax, hemp, jute and products	503	2,206	1,779	8,543	37,873	27,259
Silk and products	519	354	307	6,832	7,421	3,843
Wool, raw and unmanufactured	539	2,657	3,334	9,638	30,070	47,744
Wool products	960	4,822	5,171	15,547	54,393	67,322
Artificial silk and products	337	2,300	2,732	3,734	34,493	29,680
Textile products, other	702	4,062	2,752	13,615	46,446	39,425
TOTAL	5,510	28,771	28,251	87,443	390,589	350,619
Wood, Wood Products and Paper—						
Wood, unmanufactured	285	498	1,260	5,050	16,628	11,484
Wood, manufactured	312	1,030	1,105	4,296	17,958	13,766
Paper	528	1,417	1,354	7,520	23,027	17,213
Books and printed matter	1,274	2,409	2,593	15,277	31,935	31,268
TOTAL	2,399	5,354	6,312	32,143	89,548	73,730
Iron and Its Products—						
Iron ore	8	439	584	2,830	12,717	15,507
Scrap	173	706	1,080	857	4,197	10,454
Castings and forgings	116	557	645	2,574	8,598	9,793
Rolling mill products	1,892	7,461	8,457	25,470	77,970	83,929
Pipes, tubes and fittings	156	1,272	2,235	1,972	13,464	18,598
Wire and chain	148	697	1,431	1,992	9,413	12,653

Canadian Imports, by Commodities—*Concluded*

Commodity	December			January—December		
	1938	1947	1948	1938	1947	1948
	(Thousands of Dollars)					
Iron and Its Products—Conc.						
Farm implements and machinery	512	8,576	12,698	20,320	105,405	139,993
Hardware and cutlery	146	765	973	2,147	10,388	10,144
Household machinery	156	1,206	897	2,613	16,276	11,043
Mining, metallurgical machinery	305	935	2,066	5,261	12,150	22,541
Business, printing machinery	338	2,562	2,316	5,804	22,187	24,476
Other non-farm machinery	1,472	13,070	12,566	23,238	155,399	159,031
Tools	105	734	902	2,172	11,454	10,999
Autos, freight and passenger	1,016	939	2,510	12,720	69,540	27,303
Automobile parts	3,061	8,857	7,585	24,722	98,432	101,261
Other vehicles, chiefly iron	48	793	586	2,459	15,681	11,568
Engines and boilers	475	4,036	3,708	7,789	43,882	50,285
Cooking and heating apparatus	122	720	657	1,670	13,647	6,828
Iron products, other	1,072	4,631	4,972	15,944	61,558	55,850
Total	11,321	58,957	66,868	162,554	762,359	782,255
Non-Ferrous Metals and Products:						
Aluminium and products	283	1,740	1,104	4,899	17,183	17,662
Brass, Copper, and products	230	795	1,203	3,170	13,121	12,146
Tin	139	4	1,583	2,258	6,820	7,936
Precious metals (except gold)	191	997	1,758	2,776	12,996	16,010
Clocks and watches	165	590	366	2,252	9,026	5,302
Electrical apparatus, n.o.p.	991	5,038	5,195	13,054	68,773	62,127
Non-ferrous products, other	588	1,911	2,894	9,987	33,008	34,628
Total	2,586	11,075	14,103	38,396	160,926	155,812
Non-Metallic Minerals, Products:						
Clay and products	457	2,085	2,855	7,660	24,059	30,773
Coal	2,731	11,561	15,588	35,826	138,950	186,388
Coal products	270	1,546	1,338	3,346	14,739	19,839
Glass and glassware	535	1,669	1,935	6,670	28,626	25,925
Petroleum, crude	1,323	11,753	15,599	40,972	127,459	191,980
Petroleum products, n.o.p.	752	6,724	6,211	14,635	79,735	109,802
Stone and products	332	1,114	1,304	6,880	18,357	20,084
Non-metallic products, other	349	1,162	1,577	5,733	20,273	21,391
Total	6,749	37,614	46,207	121,721	452,198	606,182
Chemicals and Allied Products:						
Acids	58	249	299	1,694	3,510	3,926
Cellulose products	141	416	427	1,719	5,457	4,451
Drugs and medicines	180	661	1,264	3,389	11,653	13,164
Dyeing and tanning materials	309	753	945	4,313	10,415	10,117
Fertilizers	408	522	584	3,873	6,585	6,298
Paints and varnishes	197	1,013	1,116	3,774	13,441	14,277
Inorganic chemicals, n.o.p.	365	1,078	1,809	7,908	13,787	18,481
Synthetic resins and products	105	1,202	1,053	980	16,304	15,012
Chemical products, other	422	2,685	2,834	7,556	31,933	32,654
Total	2,185	8,577	10,330	35,206	113,085	118,380
Miscellaneous Commodities:						
Films	97	234	284	1,318	2,828	3,624
Toys and sporting goods	136	365	354	2,446	7,639	4,331
Refrigerators and parts	7	509	493	1,080	12,134	5,816
Musical instruments	123	207	280	1,236	4,712	3,357
Scientific equipment	313	1,424	1,593	4,352	17,330	17,594
Aircraft and parts	39	730	805	2,883	12,284	7,854
Works of art	183	102	265	2,287	1,691	1,865
Canadian Tourists' purchases	608	229	7	8,715	15,870	316
Parcels of small value	392	1,239	1,272	4,428	24,529	9,590
Wax, mineral and vegetable	25	103	191	441	2,536	2,211
Miscellaneous consumer goods	397	631	683	5,251	14,009	7,052
Miscellaneous	445	2,403	1,697	9,133	23,848	25,401
Canadian goods returned	253	545	663	2,269	7,228	7,988
Non-commercial articles	276	1,212	1,290	3,801	15,414	18,348
Total	3,292	9,932	9,879	49,640	162,053	115,346

South African Output of Footwear Expected to Increase This Year

Good trade conditions generally prevailed in past year—More emphasis placed on efforts to increase domestic consumption—Manufacturers striving to maintain export markets gained during war years—Import and exchange controls limit purchases of Canadian footwear.

By S. G. Tregaskes, Acting Commercial Secretary for Canada

CAPE TOWN, January 28, 1949.—Footwear production is expected to increase this year, a characteristic of the industry for more than three decades. Good trade conditions prevailed during the greater part of 1948, retailers' stocks have been maintained at more normal levels, and larger quantities of materials have been exported. In general, also, more emphasis has been placed on efforts to increase consumption in the home market.

In 1947 and early 1948, the South African footwear industry suffered a fall in production, caused partially by heavy overstocking on the part of distributors and by the reappearance in the shops of a greater volume of British, American and Canadian shoes. Severe unemployment, with many operators working only part time, resulted in the loss of many skilled operators.

South African Footwear Production

Year	Leather boots and shoes	Canvas shoes	Slipper leather and fabric uppers
1933	4,870	281	319
1935	6,154	1,823	896
1937	6,978	3,280	1,125
1939	8,010	3,538	1,685
1941	9,486	3,238	1,556
1942	10,714	3,002	1,636
1943	11,006	1,698	1,487
1944	11,813	1,152	1,850
1945	12,489	1.407	1,883
1946	12,924	1,800	1,900
1947	9,108	1,972	2,000
1948	11,000	*2,000	*2,000

*Estimates only.

Production of canvas shoes has declined, due, it is believed, to the increased standard of living of the coloured and native worker, which has enabled this section of the population to favour the leather types of footwear.

South African Footwear Production by Types in 1946

Welted footwear	2,000,000
Staple welted	1,000,000
Blake sewn	1,250,000
Rivetted and stitched	1.800,000
Stitchdown	3,600,000
Stuck on	2,200,000
Slip lasted	550,000
Slippers, all types	1,900,000
All others (including canvas, vulcanized sole)	2,500,000
Total (approximate)	16,800,000

Approximately fourteen thousand employees are engaged in the footwear industry, concentrated in the five main production areas of the Union. This total labour force is comprised of approximately 25 per cent white male labour, 23 per cent white female labour, 47 per cent coloured and native male labour, and 4 per cent coloured and native female labour. Approximately 13,300 employees are engaged as actual operatives in the industry and 700 as clerical and administrative staff.

Expansion Plans Indicate Confidence in Footwear Industry

Plans are under way for the development of new footwear factories, as well as substantial additions to the ninety plants in operation. One new footwear factory is being erected and plans have been completed for extensions to four existing plants.

In 1946, six of the ninety factories each produced over 500,000 pairs of leather footwear per annum and 39 factories each produced between 50,000 and 200,000 pairs per annum.

The leather and footwear industry in the Union has recognized the importance of scientific research in its endeavours to supply quality products for all price ranges. In 1942, the industry established and financed the Leather Industries Research Institute, and the Union government, recognizing the importance of the Institute to this branch of secondary industry, granted a subsidy on its foundation. The Institute makes available to all contributing factories the results of its research, not only on footwear and fitting problems but also of its research on leather and tannages and every problem directly related to the tanning footwear and ancillary industries.

Since 1943, exports of leather boots and shoes, canvas shoes and slippers have exceeded imports. The war years provided manufacturers with an expanding outlet in the Pan-African market, when imports from overseas were drastically curtailed. In 1945, for example, the Union exported 1,486,000 pairs of footwear, including nearly 900,000 pairs of civilian leather boots and shoes, to more than twenty-one countries. In that year, the Union's principal markets were South-West Africa (165,000 pairs), Southern Rhodesia (389,000), Northern Rhodesia (109,000), Belgian Congo (265,000), French Equatorial Africa (71,000), Madagascar (69,000) and Syria (58,000). Efforts are being made to maintain these export markets. Particular attention is being given to the Central African territories and the Rhodesias as the logical and immediate export markets for the South African industry. For a time following the imposition of import control in September, 1947, these markets were temporarily closed to Union shoe exporters.

In 1946, the Leather Industries Research Institute of South Africa completed a survey of the footwear manufacturing industry in the Union to the end of 1945. Two of the statistical tables published in this survey are of particular interest to Canadian footwear manufacturers interested in export trade to South Africa, as they illustrate the trend away from the use of imported footwear in favour of the local product.

Imports of Footwear as a Percentage of Estimated Domestic Consumption

Year	Leather boots and shoes Per cent	Infants' shoes Per cent	Canvas shoes Per cent	Slippers Per cent
1933	9	100	83	53
1935	6	100	38	32
1937	6	100	24	24
1939	3	94	21	14
1941	*	77	1	9
1942	*	66	*	6
1943	*	49	*	*
1944	*	28	*	*
1945	*	11	*	*

*Negligible quantities.

Indices of Trends in Per Capita Consumption of Footwear

(1925-29 Average=100)*

Three-year moving average	Leather boots and shoes	Leather boots and shoes and canvas shoes
1933-35	90	102
1934-36	86	113
1935-37	102	123
1936-38	103	124
1937-39	106	127
1938-40	105	126
1939-41	107	127
1940-42	108	122
1941-43	110	118
1942-44	111	114

*Based on total population of European racial origin and non-European population in urban areas only. Canvas shoes have been given half the weight of leather boots and shoes.

Per Capita Consumption of Leather Boots, Leather and Canvas Shoes

Period	Leather boots and shoes		Leather boots and shoes, plus 50 per cent canvas shoes*
	Total European population	Total European, plus non-European in urban areas	Total European, plus non-European in urban areas
1925-29	3.47	2.02	2.13
1930-34	2.95	1.65	2.07
1935-39	3.89	2.11	2.65
1940-44	4.16	2.20	2.51

*One pair of leather boots and shoes is assumed to be equivalent to two pairs of canvas shoes.

The above tables portray the declining percentage of imported footwear in relation to total domestic consumption, although the per capita consumption of footwear has increased for the same years. The trend away from the use of imported footwear, while marked prior to the war, was accentuated during the war years when imports from overseas were negligible. The quality of the local product, especially in the lower and middle price ranges of footwear, has improved. The introduction of import and currency controls on November 5, 1948, will make it increasingly difficult for Canadian footwear manufacturers to export to the South African market. By these controls, dollar exchange is to be made available to importers during the period July 1, 1948, to June 30, 1949, on the basis of fifty per cent of their imports from hard-currency countries during the year 1947-48. It may be concluded, therefore, that imports of Canadian footwear in 1949 will be on a more limited scale than in 1948, and will be confined to infants' shoes, high-grade men's and women's slippers, and leather shoes based on more advanced Canadian styling and top quality rather than on a purely competitive price basis.

Galvanized Steel Transmission Towers Required by New Zealand

The New Zealand State Hydro-Electric Department, Wellington, New Zealand, has called for tenders on contract No. 105, for galvanized steel transmission towers for Otahuhu-Whakamaru-Bunnythorpe 220 kv. line. Tenders close with the Secretary, Tenders Committee, State Hydro-Electric Department, Wellington, New Zealand, at 4 p.m. on May 17, 1949. Interested Canadian firms may obtain copies of the specifications on application to J. A. Malcolm, New Zealand Government Trade Commissioner, Room 609, Sun Life Building, Montreal, Canada.

Meeting of Buyers and Sellers Is Main Function of Trade Fairs

Market for men professionally concerned in buying and selling established to fill an authentic demand—Function and value measured by attendance of buyers—Trade fairs must not only charm the world's buyers, but must also bring them back from year to year.

(Editor's Note—The following article, on "The Function of Trade Fairs", is reproduced by permission from the London *Times*' "Survey of the British Industries Fair". It should prove of particular interest to firms planning participation at the Canadian International Trade Fair, being held in Toronto from May 30 to June 10, 1949.)

ALTHOUGH in many fairs today the element of public merrymaking has long outlived any other, a fair is by origin a large-scale market. That is, a fixed time and place for the meeting of buyers and sellers. By the same token, a trade fair is a market for men professionally concerned in buying and selling. This distinction is upheld in all reputable trade fairs today, in that retail buying by the general public is prohibited. But, apart from this replacement of public trading by the professional etiquette of samples and orders, trade fairs share in a commercial tradition which is probably as old as civilization itself.

Historically speaking, then, the easiest answer to the question of the value of trade fairs is the fact that they have existed at all. Sited at the intersections of time-honoured trade routes, the great European fairs of the past grew up almost automatically in response to an authentic demand. Many of them developed naturally from merchants' rendezvous to national centres of exchange, as at Nijni-Novgorod, where the year's output of Russian manufacturers was largely regulated by prices quoted at the fair. In more recent times, the rate of business at the seasonal fairs of Leipzig used to be described as a reliable barometer of Germany's whole economic atmosphere.

The appeal to history, however, is clearly not enough today. Times have changed—and with them transport, communications, and indeed all the governing factors of modern trade. How do trade fairs, admittedly once an integral element of international commerce, fit into the picture today?

A Trade Fair is an Exhibition With a Difference

The situation has been more than a little confused by the emergence since the later nineteenth century of national or international exhibitions. It is impossible to speak about trade fairs for long without having to disentangle them from exhibitions (or expositions, as they are commonly called across the Atlantic). Nor is there any easy line of demarcation, since both their forms and their functions overlap at many points; but it can safely be said that a trade fair, though it obviously is a kind of exhibition, is showing its samples for a precise commercial purpose, for the benefit of the trade buyer and in particular the oversea buyer. An exhibition, on the other hand, makes no limit of its audience; it is a national spectacle, educational and even cultural in its appeal rather than commercial, though good business is likely to result from a successful exhibition, even where it is not explicitly sought. Conversely, there is bound to be a certain air of national prestige about any important trade fair. And indeed why not—so long as this does not usurp the place of honest trade?

Thus, in theory, the general public have no place at a trade fair, but in practice it becomes very difficult to exclude them. Quite apart from the sordid consideration of their gate-money, they have a strong claim to be present at what, in the case of the British Industries Fair, for instance, represents the focal point of their own productive efforts since the war. The management of every trade fair is faced with this dilemma and has to find its own solution. The British Industries Fair in London compromises by admitting the general public on only three of its twelve days' span.

Function and Value of Trade Fair Measured by the Buyer

None of this should obscure the fact that it is the buyer alone by whom both the function and the value of a trade fair are to be measured. Through the buyer a kind of natural selectivity expresses itself in trade fairs; without evidence of his regular and lively patronage, no manufacturer could be induced to exhibit for long. Of all the statistics in which a trade fair may take pride, the most significant are the numbers and nationalities of its visiting buyers.

This natural selectivity operates among trade fairs today, whether they have an ancient European history behind them or came into existence as a result of the special conditions generated by the two world wars of this century. Many current European fairs were born in circumstances of unnatural emergency. The British Industries Fair, for example, was promoted in 1915 primarily to encourage the domestic production of articles and components formerly imported from Germany or Austria. That it is still functioning in 1949 can be explained by the fact that buyers, especially foreign buyers, have found it worth their while to continue visiting it. The same is true of those Continental fairs whose original merit consisted chiefly in the opportunity they offered for the restoration of oversea contacts and agencies disrupted by war.

The essential purpose of trade fairs, then, is the provision of special facilities for buyers, and their contribution to international trade is best evaluated by this canon. As far as exhibitors are concerned, participation in a trade fair must be to some extent an act of faith. For the proverbially hard-headed manufacturer, no very satisfactory account can be rendered of actual business done at a fair. Many orders which can in fact be attributed to an exhibit do not come in until long after the show is over. The position is rather analogous to that in advertising, of which the results are not often immediately recognizable.

No such faith, of course, is required of the buyer—he can be certain within a few hours of passing the barrier whether the expense and trouble of his trip are being justified. What are the special advantages offered him by trade fairs? In the first place, representative samples from a variety of firms producing his line of goods are brought together in a single, convenient space. The saving of time and expense is obvious, especially where an industry is not localized and its individual firms widely scattered. Moreover, the buyer may be introduced in this way to a broader range of new firms, and, of course, the competitive stimulus provided by close juxtaposition and direct comparison is all to his advantage. Trade fairs tend to throw up all that is best and newest, whether in technology or commercial enterprise.

Personal Contacts May be Renewed

They offer, too, an excellent opportunity for renewing and confirming personal contacts after the frustration or tedious second-best of correspondence. Altogether they can provide a quick but comprehensive survey of the essence of a manufacturing industry, as well as a preview of its trends; they can make available an up-to-date exchange of problems and information (for both a manufacturer's and a buyer's views may be salutarily modified at a good trade fair—its atmosphere is peculiarly conducive to the broadening of horizons). That buyers themselves should meet together is an additional advantage and there is no need today to emphasize the merits of promoting a genuine international atmosphere, even though this is strictly a social by-product.

Such are some of the considerations which enlist the support of buyers. It is the function of trade fairs to make these considerations a matter of permanent fact. Sceptics may suppose that there is nothing a trade fair can achieve which the efficient buyer and seller cannot do for themselves. Even if this were true, it is doubtful whether anything could be achieved quite so amicably and expeditiously. But is it even true? There is a sort of seasonal climax, a point of concentrated and competitive endeavour about a trade fair to which the individual showroom can never quite aspire. There is no place here for meretricious display, for the merely spectacular or the merely familiar—buyers are traditionally impervious to the irrelevant. In itself, a trade fair symbolizes that marriage of function and design which is the ideal of industry. It must charm the world's buyers, but, unlike an exhibition, it must bring them back next year. They are its customers and it is still a sound axiom of business that the customer is always right.

Goods Despatched Under ECA Listed

The seventh report of the Public Advisory Board, which covers the activities of the European Recovery Program up to and including December 31, 1948, gives the following information on "reported shipments" under E.C.A, i.e., goods which have actually been despatched. This indicates a marked increase in the proportion of procurement authorizations shipped in the month of December.

	Total authorizations	Reported shipped	Per cent
	(Millions of dollars)		
Food, Feed and Fertilizer—			
Bread grains	256.4	239.3	93
Fats and oils	12.6	8.1	64
Coarse grains	7.3	4.9	67
Meat	52.5	41.2	78
Dairy products	10.0	10.0	100
Oilcake, meal, etc.	3.5	1.7	49
Fertilizer	2.8	1.8	64
Fruits and vegetables	0.4	....	..
Miscellaneous	8.8	0.7	8
Fuel—			
Petroleum and products	0.1	0.1	100
Raw Materials and Semi-finished Products—			
Non-ferrous metals and products	127.0	88.3	69
Chemicals and related products	2.5	1.8	72
Iron and steel mill products	2.0	....	..
Fabricated basic textiles	1.6	....	..
Lumber and lumber manufactures	33.6	20.6	61
Pulp and paper	33.3	24.4	73
Metallic ore and concentrates	7.7	3.2	41
Hides, skins and leather	2.0	0.4	20
Non-metallic minerals	4.7	2.6	55
Machinery and vehicles	21.8	7.7	35
Miscellaneous	2.9	0.1	5
Total	593.5	456.9	77

Costly Consignment of Canadian Cattle Carried by Air to Chile

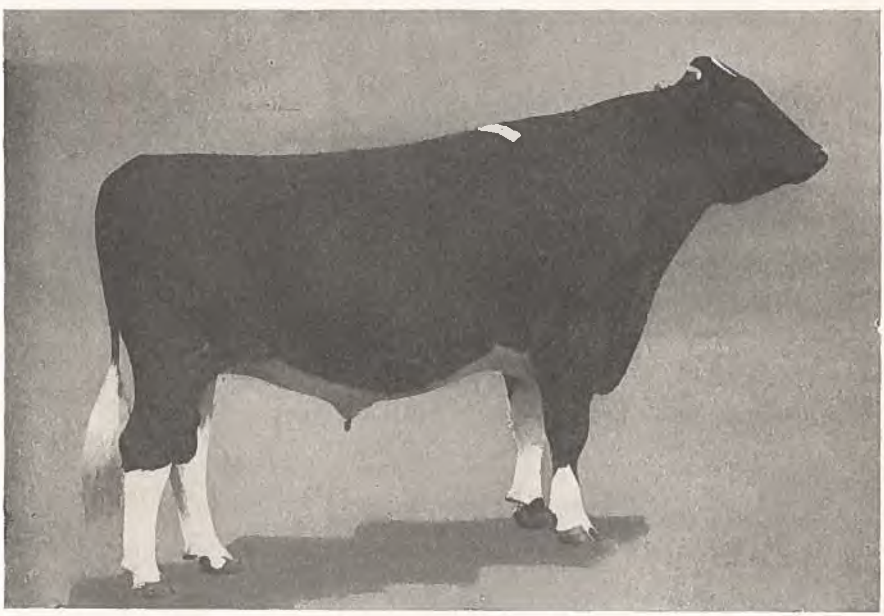
Fifteen head of Holstein-Friesians, purchased recently for $59,000, will join other Canadian purebreds in famous herd —Top price was $13,000, paid for twice Reserve All-Canadian "Sonniwilk Sovereign" — First of two shipments scheduled to leave Malton Airport on Tuesday.

FIFTEEN head of purebred Canadian Holstein-Friesian cattle, recently purchased in this country for $59,000, will leave shortly by air for Chile, where they will join a famous herd that owes part of its reputation to purebred livestock obtained from Canada in 1940 and 1946. The first shipment is scheduled to leave Malton Airport, near Toronto, next Tuesday, with the second heading south on March 15. It is estimated that the overall cost of the consignment, landed in Santiago, Chile, will be $79,340. The purchase was made by Jose Barros, who is recognized as one of the foremost breeders of Holstein cattle and merino sheep in Chile.

The top price was $13,000, paid for the twice Reserve All-Canadian, *Sonniwilk Sovereign,* which was owned by James R. Henderson, of Kingston, Ont. This four-year-old bull has been classified as XXX, and was Grand Champion at the Winter Fair, in Ottawa, last year. He is a son of the noted *Sovereign,* and will be accompanied by a daughter that was declared Junior Champion at the Ottawa Winter Fair, and was bought for $1,500 by Sr. Barros.

Glenafton Laurel Phoebe, one of the *Marksman* daughters, was purchased for $7,500, this being the highest price paid for a female in the

Chile—*Glenafton Rag Apple Alert,* All-Canadian and All-American three-year-old champion bull in 1947 and two-year-old in 1946, which was flown from Malton Airport, near Toronto, to Santiago last May. It was sold for $11,500. This Holstein-Friesian bull was part of a shipment claimed to be the most valuable ever to leave Canada by air. Fifteen additional purebred Holstein-Friesian cattle have recently been purchased for shipment by air to Chile.



group. Eight head were secured from J. J. E. McCague, of Alliston, Ont., three of these being daughters and five grand-daughters of the six times All-Canadian *Marksman.*

Another costly female is *Forthlyne Dolleta Inka Posch,* All-Canadian Aged Cow for 1948, which was bought for $5,000 from Hugh W. Ormiston, of Brooklin. This breeder also disposed of *Springdale Lucy Price,* Grand Champion Female at the 1947 Peterborough Show, for $3,000. Raymondale Farm, at Vaudreuil, Que., contributed a three-year-old daughter of the XXX *Ajax,* purchased for $3,000, while Orvan Chambers, of Wilfrid, Ont., sold a pair of heifers for shipment to Chile, one for $2,600.

Sr. Barros, who has a 1,600-acre ranch with some 200 purebreds and 300 grade cattle, secured seven females and two bulls from the first shipment of Canadian Holsteins made to Chile in 1940. The cows are still alive. Favourably impressed with the quality of these cattle, he bought eighteen head in 1946. The shipment of his recent purchases by air is unique, in that it is seldom so many older animals are transported by aircraft for so great a distance. *Sonniwilk Sovereign* alone weighs 2,700 pounds, and is one of the largest bulls ever to be loaded for shipment by air.

Output of Scottish Coal Mines Short of Target in Past Year

Production totalled 23,700,000 tons as against objective of 25,000,000 tons set by National Coal Board—One thousand more workers employed and output per man-shift improved, but labour disputes reduced total production—Supplies for domestic consumers more adequate than in 1947.

By J. L. Mutter, Canadian Government Trade Commissioner

GLASGOW, January 20, 1949.—Failure of the Scottish Division of the United Kingdom coal-mining industry to achieve the production target of 25,000,000 tons for 1948, set by the National Coal Board, has given rise to considerable disappointment, especially as there is conclusive evidence that 25,000,000, or even 26,000,000 tons, was not beyond the industry's capacity, having regard to the increase in the number of mine workers over the twelve months and the progressive introduction of new machinery, combined with other technical improvements.

Output of Scottish Coal Mines

Year	Tons	Year	Tons
1939	30,526,900	1944	23,366,300
1940	29,689,500	1945	21,395,000
1941	26,651,700	1946	22,665,500
1942	26,188,800	1947	22,978,000
1943	24,701,800	1948	23,700,000

Reorganizations and new major development projects planned under a ten-year expansion program made, on the whole, only moderate progress during 1948. Shaft sinkings generally were delayed by the slow delivery of sinking equipment, and many new schemes did not advance much beyond the early-planning stage, so that there is as yet no indication of their influence on total output figures.

At the end of 1948, wage-earners on colliery books numbered 82,400 as compared with 81,900 at the end of 1947, but marginal improvements in manpower were wider. Thus, about 1,000 more men were at work in

November than in November, 1947. There was a slight decrease in the number of face-workers, from 36,360 at the end of 1947 to 36,100 at the close of 1948.

In general, the intake of new recruits rose in all the Scottish coal-mining areas except one, Central West, where mining activity is expected to recede gradually over the next few years, wastage being offset by normal recruitment. The average output per man-shift improved over the twelve months to about 22·25 cwts. as compared with 22 cwts. in 1947 and 22·8 cwts. in 1938. The prewar output was obtained, of course, in a six-shift week. The opinion has been expressed, however, that a corresponding effort in a five-and-a-half-day week, taking no account of increased mechanization, should have produced nearly 25 cwts.

Labour Disputes Reduced Output

Labour disputes again adversely affected the Scottish coal-mining industry, unofficial strikes, the majority of which were in the Central, Ayrshire and Fife areas, resulting in a loss over the year of approximately 180,000 tons. On a dozen occasions in 1948, the weekly loss exceeded 5,000 tons. An even more serious problem, however, and one which nationalization of the industry has not yet succeeded in solving, is that of irregular attendance. Absenteeism among face-workers averaged 11 per cent, while the figure for all workers throughout 1948 was 9·5 per cent. Voluntary absenteeism (that for which there is no valid excuse) accounted for the loss of a tonnage sufficient to have enabled the industry to exceed its target.

Average earnings of underground employees for the first quarter of the year were 172s. 7d. a week, and in the third quarter 167s. 3d., while surface workers received 121s. 6d. and 124s. 11d. respectively in the same periods. Wages cost per ton of saleable output rose to 28s. 6·7d. in the third quarter of 1948 from 24s. 2·7d. in 1947. It is stated that prospects for any substantial reduction in operating costs rest mainly on an improvement in individual effort. This, it is claimed, could be attained readily by task re-assessment, regular attendance, abolition of unofficial strikes, better individual performances and hence more efficient use of increased mechanization.

Distribution in the domestic market of available coal supplies was accomplished to the general satisfaction of consumers, who began the year with substantially higher stocks than in 1947. More favourable weather in the spring kept down the level of consumption, and there was no repetition of the large-scale interruption of supplies which took place during the fuel crisis in 1947. Furthermore, adverse weather conditions during the summer did not result in an increase of raw fuel consumption for domestic and general industrial purposes, gas and electricity being preferred for temporary additional heating requirements. This, however, was reflected in increased demands from gas works and power stations.

Small sizes for coke-ovens were in short supply for the greater part of the year, with deliveries meeting requirements by only the barest of margins. Production of coking coal during the year was approximately 3,000,000 tons, including 1,250,000 tons of "smalls". It is planned to increase production of this type of coal during the next ten years to 3,500,000 tons, of which $1\frac{1}{2}$ million tons would consist of smalls.

Export cargoes and bunkers shipped from Scottish ports in 1948 amounted in the aggregate to 2,232,659 tons, of which 1,319,383 tons were exports and 913,276 tons bunkers. Ireland headed the list of fifteen countries receiving coal from Scotland, taking 364,641 tons, followed by Sweden (287,709 tons), Denmark (214,342 tons), Finland (197,562 tons), and France (89,873 tons).

Siam Institutes Import Controls To Assist Rehabilitation Plan

Aims at reduction of purchases of luxury goods from abroad —Foreign exchange expenditures to be concentrated on equipment and materials for rehabilitation and development —Administration of regulations not likely to be unduly severe—System may remain in force for limited time only.

By Paul Sykes, Canadian Government Trade Commissioner in Singapore

(Editor's Note—Quotations on Canadian goods for export to Siam should be made in United States dollars. The current unofficial exchange rates for United States dollars in Bangkok is U.S. $1.00 equals 19.75 ticals.)

SINGAPORE, January 7, 1949.—Siam recently instituted a system of import controls to reduce purchases of luxury goods from abroad and to concentrate foreign exchange expenditures on equipment and materials for rehabilitation and development. The commodities involved include a number of cosmetics and toilet articles, various fresh, dried and canned foods, passenger cars and motorcycles, spices and savories, toys, prepared fruit drinks, cement, oxygen and oils for the manufacture of paints. Full details are available from the Foreign Trade Service, Ottawa.

Particulars regarding administration of these new import controls are not available except for a notification to the effect that goods ordered prior to December 25, 1948, may be imported after the relative licences have been approved. No applications for other licences will be considered until such pending business has been dealt with, nor is there as yet any clear indication as to the quantities of "prohibited" imports for which licences may be issued, nor the sources from which such purchases may be made. Reliable advice suggests, however, that administration of the regulations is not likely to be unduly severe and that the whole system may remain in force for only a comparatively short time.

The incidence of these controls on Canadian trade to Siam is not likely to be serious except in the case of motor cars, since business in foodstuffs and other "prohibited" items has never reached large dimensions and has, in any case, fallen off considerably during recent months owing to abnormal exchange conditions. As, however, motor cars have for some time constituted a large part of the value of Canadian exports to Siam, records of total shipments to that market may be expected to show slight declines, depending upon the severity of licensing policy and the length of time the scheme remains in force.

Financial Position of Siam is Sound

A recent business visit to Bangkok, Siam's capital and chief commercial centre, bears out reports that the country has made marked progress in recovering from the ill-effects of several years of Japanese domination and in re-establishing its economy on a generally secure and profitable basis. Siam, in these present days of food shortages, has been the only substantial exporter of the rice for which the whole of eastern Asia has been in such urgent need (Burma's production now being negligible). When a large part of such exports earn gold dollars which can be added to the dollar and sterling revenues from export sales of rubber, tin, shellac and various other valuable goods, the country's financial position is becoming very sound.

The exchange position in Siam as between official and unofficial rates for sterling and dollars is exercising a profound effect on the country's

Siam—Ocean terminal, with godowns, at Bangkok. Import controls were recently instituted by Siam to reduce purchases of luxury goods abroad and to concentrate foreign exchange expenditures on equipment and materials for rehabilitation and development.

import trade. Despite the existence of "official" rates based on London or New York, there is a local depreciation in the rate payable for purchases from sterling and dollar countries. The "unofficial" rates today are roughly 20 ticals to the United States dollar and 60 ticals to the pound sterling. This depreciation in the rate payable for sterling operates as a keen incentive to the purchase of import requirements from the United Kingdom and other sterling sources. When it results in an increase in price of 33⅓ per cent in the cost of goods imported from dollar countries, even though the f.o.b. price in each instance may be exactly similar, the present trend towards increased trade with sterling countries can be readily understood.

The foregoing position acts as a serious deterrent to Canadian exports to the Siam market which, according to Canadian foreign exchange regulations, must be paid for in United States dollars. The result has been a decided falling-off in imports from Canada of canned foods, beer, milk products and a number of other lines in which promising trade has been built up during the past two years. Such articles can now be sold to the Siam market, apart from the incidence of import controls, only when competition from sterling sources is unusually weak, either as far as design, quality, regularity of supply or price is concerned.

Purchases of Canadian Aluminum Have Increased

A more encouraging feature of Canadian trade to Siam is the increase in sales of aluminum in various forms. Previous business in sheets for spinning and stamping and in foils for wrapping, decoration, etc., has recently been extended to include ingots for treatment in a number of small rolling mills. Another valuable item of business has been the sale of a large quantity of sulphate of alumina for water purification purposes. Other Canadian products in which continued and improved trade can be expected are newsprint and other papers, tires, various chemicals, fertilizers, electrical equipment and some types of machinery.

Canadian firms interested in trade to Southeast Asia should not overlook the opportunities, however limited, offered by the Siam market. The names of various import firms interested in developing or extending connections with Canadian manufacturers and exporters and suggestions regarding current market opportunities can be obtained from the Foreign Trade Service, Ottawa, or the Canadian Government Trade Commissioner, Singapore.

Sheep-Raising is Leading Branch Of Agriculture in New Zealand

Total number of sheep and lambs in 1947 approximately 32,700,000—Country ideally suited to the industry—New Zealand ranks seventh in number of sheep and fourth as a wool-producer among world countries.

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

WELLINGTON, December 15, 1948.—Sheep-raising contributes more to the national income of New Zealand than any other branch of agriculture. Dairying is in second place. In 1947, there were about 32,700,000 sheep and lambs in New Zealand and about 32,900 sheep-owners. About 22,200 owners had 1,000 sheep or less, 10,000 owned from 1,000 to 5,000, and about 700 had flocks in excess of 5,000. The number of sheep has been relatively stable since the beginning of the century. Of the total sheep, about 20,500,000 are breeding ewes.

Any visitor travelling over most of the main highways cannot but be impressed with the importance of sheep in New Zealand; they seem to be everywhere in large numbers. The rich green carpet of grass covering the rolling landscape and, in some cases, the high hills appears to be ideally suited to the production of mutton and wool. There is considerable variation in the carrying capacity of the country. At the one extreme is high country in the South Island with about one sheep to ten acres and, at the other, improved pastures, heavily top dressed with superphosphate, with six or more sheep to the acre. The value of sheep farming land varies between 2s. and £50 per acre.

It is estimated that about 32 million acres of a total occupied area for primary production of 43 million acres are used in sheep production. The average for all New Zealand is therefore about one sheep to the acre. About 67 per cent of the Dominion's sheep are cross-breds in which the Romney strain predominates. About 19 per cent are of the Romney breed, 7 per cent half-bred, 3 per cent Corridale, 2 per cent Merino, and the other 2 per cent is made up mostly of the Southdown, Border Leicester, English Leicester, Lincoln, Ryeland, Shropshire, Cheviot, Suffolk and Dorset Horn breeds. There are about 600,000 purebred, or stud, sheep in New Zealand.

Sheep Farms in Lower Hill-country Most Important

High hill-country sheep farms, which are mainly in the South Island, cover about 10,000,000 acres and carry about one sheep to every four acres. This land, which is generally steep, is of low fertility and covered mainly by native tussock grasses In some years there are heavy snowfalls in these areas, which cause considerable mortality among the flocks. Practically all the income of these farms is from wool.

New Zealand—Pastoral scene in the Manawatu District, North Island. Sheep-raising contributes more to the national income of New Zealand than any other branch of agriculture.

At least 20 million acres are found in the lower hill-country farms, which are located on the North and South Islands. These farms are most important, as they are a source of supply of stock to the low-country fattening farms. On the average, these lower hill-country farms carry between one and two sheep to the acre. On many of these farms cattle are used as the only practical method of crushing and eating off ferns and other roughage which are left by the sheep and would otherwise increase rapidly. Most of these cattle are sold as stores to farmers on the better-quality land for fattening.

The sheep fattening farms are located on land of high fertility, either natural or induced by top-dressing with fertilizers. This land is used for fattening stock or for dairying, according to the net returns from different products. The country is generally low-lying, varying from flat to undulating. Climate varies from relatively warm and moist in parts of the North Island to fairly cold and dry in the South Island. This influences the type of feed produced, as in the North it is the practice to rely almost entirely on grass from improved pastures sown in English grasses and clovers and regularly top-dressed, while in the South it is essential to grow special crops for fattening. The average range of carrying capacity is from three to six sheep per acre.

In the North Island, cross-bred, predominantly Romney, ewes are almost universally used. These ewes from hill-country farms are purchased by private treaty or more commonly at the annual ewe fairs in January or February. The ewes are now nearly always mated with Southdown rams. This results in the most acceptable type of lamb carcass. Lambing percentages are usually high, averaging from 110 to 120 per cent. The lambs for slaughter are sold on the farms direct to representatives of the meat-freezing companies.

Unlike the North Island, where lambs are fattened on grass, the fattening farms on the South Island may in some areas be irrigated or grow alfalfa because of prolonged dry spells. Considerable areas of special crops such as rape, for lamb fattening are grown. Roots, hay and chaff are also used as feed for ewes. The ewes available from the hill country in the South Island are more mixed in type than those in the North Island. English Leicester and Border Leicester rams are used to a considerable extent, but the Southdown is tending to replace other breeds. Lambing percentages are lower and lines of fat lambs are not so even or so valuable, pound for pound, as in the North Island.

Mixed Sheep-raising and Dairying Practised

In addition to the high and low hill-country and the fattening farms, there are a small number of sheep farms which are combinations of other types. There are also some farms on which dairying and sheep production are practised. Finally there are stud, or pure-bred, sheep farms, which are the fountain-head for the supply of rams. These farms are highly specialized and are situated on first-class land. In addition to supplying the needs of New Zealand flock-owners, pure-bred stock has been shipped to every major sheep-producing country in the world. In the North Island, two breeds, the Romney and the Southdown, are of major importance, while in the South Island there are a number of breeds of relatively equal importance.

New Zealand Ranks Fourth as Wool-producer

Although a small country, New Zealand is the seventh most important country from the standpoint of sheep numbers and fourth in wool production. Australia, Argentina and the United States annually produce more wool. In the export of wool, New Zealand is third in importance, and its only serious competitors in the production and export of crossbred wool are Argentina and Uruguay.

New Zealand produces about one million bales of wool annually, each averaging 320 to 325 pounds. About 90 to 95 per cent of this wool is sold at auctions in New Zealand through wool brokers. The second most important method of disposing of wool is shipment direct to the United Kingdom for sale at the London wool auction sales. This method probably represents only about 2 to 5 per cent of the total sales. Only small quantities are disposed of in other ways.

About 95 per cent of the New Zealand wool clip is exported. Exports of wool for the twelve months ended December 31, 1947, amounted to 1,170,492 bales valued at £32,933,086. About 55 per cent of this wool was shipped to the United Kingdom, 13 per cent to France, 11 per cent to the United States, and 5 per cent to Canada.

New Zealand Exports of Wool in 1947, by Countries

	Bales	£N..Z.
United Kingdom	643,890	17,351,413
India	4,847	156,250
Canada	57,706	1,703,760
Australia	29,605	707,053
Belgium	44,012	1,225,314
Denmark	12,126	440,858
Finland	676	29,313
France	156,399	3,955,653
Germany	345	10,520
Greece	367	14,565
Italy	12,984	447,812
Netherlands	40,136	1,182,779
Norway	2,161	73,416
Portugal	446	15,398
Russia	15,264	498,567
Sweden	8,771	281,544
Switzerland	7,376	272,369
Egypt	796	23,836
Morocco	6,207	162,923
United States	126,637	3,379,796
Other countries	379	9,947
Total	1,170,492	31,933,086

Present Argentine Trade Balance May Be Maintained Indefinitely

Period of large favourable trade balances ceased in 1946—Average value per ton of exports has increased steeply, while that for imports has declined—Effect of drastic restrictions imposed in August, 1947, not evident during first six months of 1948.

By R. E. Gravel, Assistant Commercial Secretary for Canada

(Editor's Note—This is the second of two articles on economic conditions in Argentina during 1948, prepared for *Foreign Trade.*)

BUENOS AIRES, January 14, 1949.—Available statistics indicate the the period of large favourable trade balances ceased with that of 1946, and in all probability the present condition of equilibrium will be maintained for some time. It is noted that the average value per ton of Argentine exports has increased fairly steeply, whereas that of Argentine imports has actually declined, after a sudden jump in 1947. If the value per ton of exports during the first half of 1948 had been the same as in 1947, Argentina would have experienced an unfavourable balance of trade.

Foreign Trade of Argentina

	Exports		Imports	
	000,000 pesos	000 metric tons	000,000 pesos	000 metric tons
1944	2,360	6,147	1,007	3,957
1945	2,498	6,426	1,154	4,255
1946	3,973	8,199	2,332	8,341
1947	5,505	9,306	5,348	11,104
1948*	3,153	5,095	3,030	6,796

*First six months of 1948.

The effect of the drastic restrictions imposed by the authorities, commencing in August, 1947, is not clearly evident during the first six months of 1948. This is due to the fact that a great number of the import permits issued prior to the establishment of controls did not expire until the end of April, and many goods imported under those permits would not have been cleared in Argentina until June or July. However, both exports and imports from the dollar area have been steadily dwindling and, except for special purchases by I.A.P.I., the government purchasing agency, are now very low.

It may be concluded that the favourable balance maintained by Argentina is in a sense fictitious, since it reflects high prices rather than real exporting power. It has now become apparent that Argentina's high prices cannot be maintained and that the demand for Argentine produce, especially grains, will slacken, or may already have done so. It is, therefore, by no means certain that a favourable balance would be shown for the second half of 1948, were figures available.

Doubts concerning the maintenance of Argentina's exporting power are prompted by the government's agricultural policy in general, and about grains and oil seeds in particular. The decline in areas sown to the leading grains is an indication that exportable surpluses will decline. As a result, the government is almost bound to desire high prices to compensate lack of volume. There is, however, every indication that purchases will fall off, in favour of cheaper supplies from other sources. The question which inevitably rises is by what means will Argentina earn the foreign exchange with which to purchase the equipment needed for the industrialization program.

Argentina Extends System of Trade Agreements

During the year, the system of trade agreements designed to facilitate the marketing of Argentine produce in exchange for needed manufactures and processed materials was extended by treaties with Holland, Finland, Sweden and Yugoslavia. The Argentine-Brazilian trade agreement was extended to December 31, 1948, pending the signature of a new payments agreement which came into force on November 16, and which provides for settlement in cruzeiros instead of "trade agreement" dollars. Similarly, a payments agreement with Uruguay was negotiated under which settlements are effected in Argentine pesos. A supplementary financial agreement was signed with Spain, providing for the granting of an additional credit by Argentina totalling 1,750 million Argentine pesos, to be drawn on over a period of five years and providing also for the erection of grain elevators, cold storage warehouses, etc., for handling Argentine merchandise in a free port to be created near Cadiz.

The Andes agreement was signed with the United Kingdom in February. Under its provisions, Great Britain agreed to purchase 1,272,000 metric tons of maize (alternatively 300,000 tons of this may be barley), 85,000 metric tons of wheat offals, 20,000 tons of linseed oil, 100,000 tons of oil cakes and oil meals, 400,000 long tons of frozen meats, and 6,500 tons of canned corn, meat, edible and industrial tallows, meat extract and lard. In return, Great Britain undertook to ship 2,585,160 cubic metres of petroleum products, 1,000,000 tons of coal, 126,000 tons of steel, tinplate, zinc, tin, asbestos and agricultural machinery, etc., and about 50,000 tons of chemical products. The United Kingdom paid in advance to Argentina, for account of I.A.P.I., £100,000,000 representing the approximate sterling value of the British purchases and unshipped balances of pre-existing contracts, together with an additional payment of £10,000,000 as a contribution towards increased Argentine costs of production. The contracted prices of the various products have not been disclosed. The Argentine agreed to grant permits to import British goods, the importation of which had been restricted, up to an aggregate value of £10,000,000.

Under the same agreement, the Argentine government agreed to, and subsequently paid £150,000,000, representing the purchase price of the British-owned railroads in Argentina, which were officially taken over by Argentina on March 1, 1948. For some considerable time, the railways have been operating at a loss and, after the transfer, a government spokesman revealed that further increased operating costs were resulting in a deficit of over 300 million pesos per annum. Cheap fares and seasonal tickets for longer than one-month terms have been eliminated; readjustment of freight and passenger rates is being studied.

A new department of transport was created in July, 1948, and assumed the functions formerly allocated to the national transport board, and was given power to manage and operate all railways, co-ordinate road, air, sea and river transport and supervise the Argentine merchant marine and commercial air service.

The various railway systems taken over from British interests have been renamed and steps are being taken to standardize the gauge of all lines.

The number of foreign industrial concerns which have been established in Argentina since the war, complete with machinery and personnel, amounts to 107, representing a capital investment of 193,361,985 pesos and employing

Argentina—Avenida 9 de Julio, in Buenos Aires.

25,007 technicians and workmen. The majority of these enterprises constitutes a useful addition to the group of "necessary" industries, as distinct from those which produce luxury goods or items of a trivial nature.

Classification of "Immigrant" Industrial Plants

No.	Nature	Personnel
27	Building contracts	14,243
5	Building materials	359
11	Sawmills and timber working	815
5	Chemicals	488
3	Paper	1,010
12	Textiles	2,789
1	Flax processing	39
1	Alfalfa drying, etc.	13
1	Wool scouring	150
31	Metallurgical	2,824
1	Optical	25
1	Transport	1,026
8	Sundry	681

There are 31 metallurgical plants which cover a variety of different branches of the industry. Some of these plants will compete with established domestic enterprises. The Camara de Industrias Metalurgicas has addressed a note to the President of the Comisión Nacional de Radiocación de Industrias, indicating that the introduction of industrial plants from abroad may cause over-production, as established concerns already supply all the requirements of the market. It also pointed out that many Argentine concerns, especially those which are connected with the five-year plan, are planning for, or have actually started, enlargement of their plants in order to meet future requirements and the arrival of competitors has had a somewhat disheartening effect. Foreign concerns are allowed certain unfair advantages over local firms. They are permitted to import all their machinery duty-free, whereas local firms who wish to obtain new equipment have no such exemption. Foreign concerns are also allowed to import raw materials in large quantities.

Mining remains in part the Cinderella of Argentina's industries, especially in view of the estimated mineral resources in the Republic. It is also likely that some time must elapse before the enormous potential of Argentina's mineral wealth begins to be realized. The relative paucity of proper scientific surveys, and the fact that most of the known and suspected mineral resources are situated in distant and still somewhat inaccessible parts of the country are factors which will necessarily retard progress for some years. Industrial decentralization program must progress in some manner before the "extractive" side can have even nearly sufficient markets to make production economical. It is obvious that the transport of ores or unworked minerals over distances amounting to 1,000 kilometres and more always will have a heavy incidence on the cost of the processed article.

General Labour Unrest Prevalent in Past Year

During the war, there has been general labour unrest, involving strikes and slow-downs throughout industry and commerce, and disputes have largely been settled in favour of the worker. In industry, absenteeism and reduced effort have been fomented by higher wages and shortages of labour, despite the constant influx from agricultural districts.

The authorities have frequently appealed for more sustained effort and higher production. Immigration on a large scale might help by increasing productive capacity, but for the first nine months of 1948, only 83,000 immigrants entered the country, including those transferred with their industrial plants.

Early in December, the Minister of Finance broadcast a short address concerning the country's finances in which he revealed a budget surplus of 100 million pesos for the current year as compared with 548 million pesos for last year.

Many Shocks During Year for Argentine Economy

The year 1948 has been unquestionably one of shocks for Argentina's economy. The principal factors have been: the disappointment of the Marshall Plan for those who believed that it would enable them to place their own prices on Argentina's produce; the suspension of payment on the country's overseas liabilities; the increasingly severe restrictions on foreign trade and the consequent rise of the uncontrolled dollar rate from a level of 4·50 pesos in April to nearly 11 pesos in October; the devaluation of 20 per cent in several of the exchange rates maintained by the Central Bank; the spectacular increase in wages in many industries, including the most important one of building construction where it reached 40 per cent; the increase in the currency circulation and in credit, until the sudden attempt to change the position in November; the rapid rise in land values; and the almost uninterrupted increase in share quotations on the stock exchange.

G. H. Rochester Appointed Timber Controller

Gordon H. Rochester has been appointed Timber Controller, succeeding in this position Mr. W. E. Uren, who will continue his duties as Chairman of the Dominion Coal Board.

Mr. Rochester, who has been serving as Assistant Timber Controller, will remain as Chief of the Wood and Paper Section, in the Export Division. As Timber Controller, he will be responsible for the regulation of lumber exports, which are still under control to ensure that sufficient supplies are retained in Canada for domestic requirements.

Production in French West Indies Of Foodstuffs Declined Last Year

Sugar production for Guadeloupe was only 27,000 metric tons, instead of estimated 60,000 metric tons—Martinique produced only 20,000 metric tons, instead of estimated 30,000 metric tons—Social disturbances responsible for drop in production—Prices higher in 1947.

By G. A. Boyd, Honorary Commercial Agent for Canada

(Figures in metric tons of 2,204 pounds)

POINTE-A-PITRE, January 10, 1949.—Food commodity production was less last year than in 1947, with the exception of bananas. Actual sugar production, which had been estimated at 60,000 tons for Guadeloupe and 30,000 tons for Martinique, was only 27,000 tons and 20,000 tons respectively. The difference between estimated and actual production was caused by two reasons, both of a social nature. A late start in grinding operations in Guadeloupe, due to disputes concerning wage rates and the price per ton of cane to be paid share croppers and farmers as well as a six-week work stoppage during operations, resulted in a drop in the percentage of extraction of processed canes and more than one-third of the crop being left uncut.

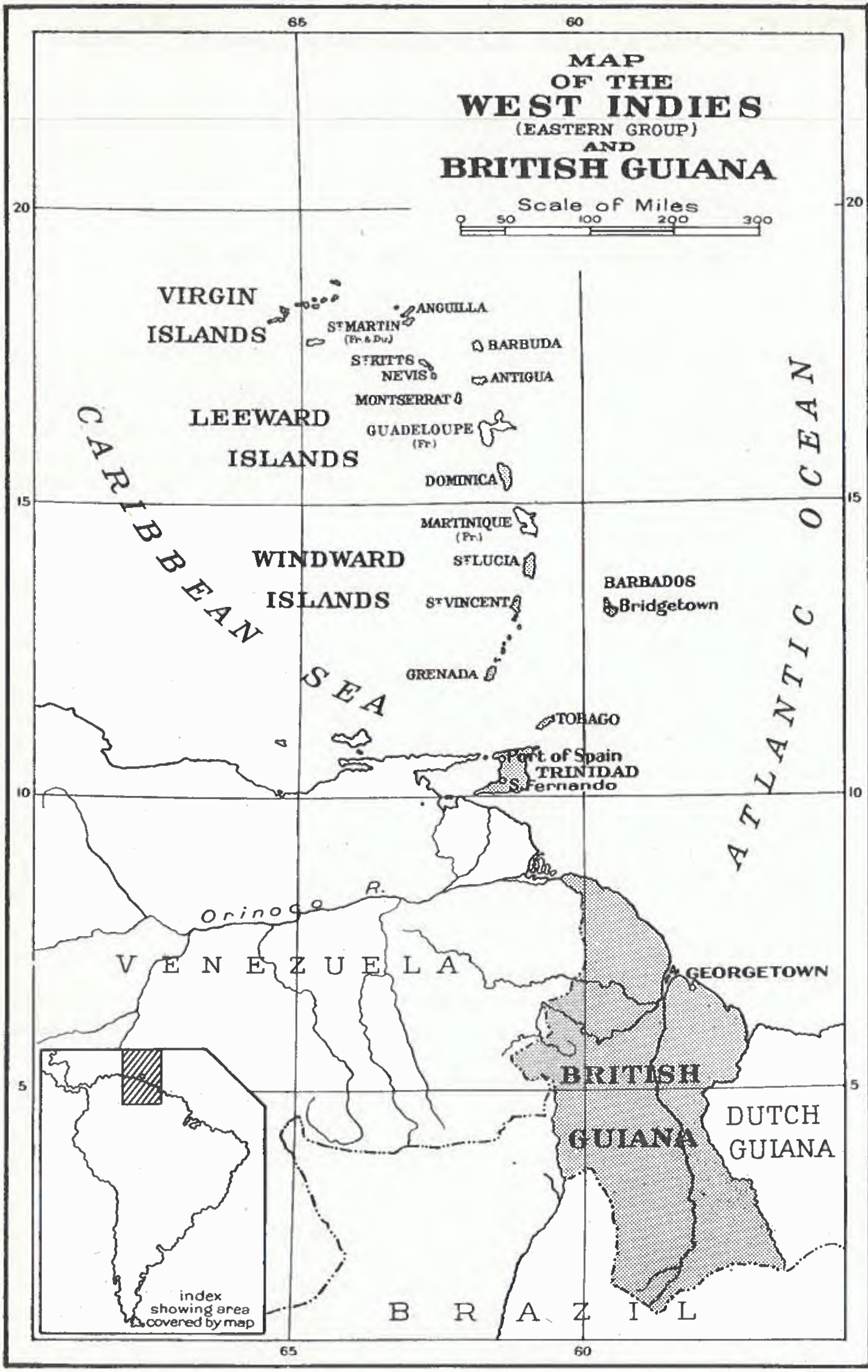
In Martinique, most of the mills began grinding at the proper time, from the 1st to the 15th of February, but intermittent work stoppages, ranging in length of time from an entire shift to a few days, made impossible the procurement of maximum industrial yield (the sugar extraction per unit of canes processed). Of the 47,000 tons of sugar produced, only about 30,000 tons were exported, the remaining 17,000 having been retained for local use, either in its original form, or for use in the manufacture of preserves, soft drinks, liqueurs and chocolate.

Prices were higher in 1947 and the value of the crop was in excess of 2,250 million francs, which was 750 million francs in excess of the 1947 figure but only about $10,000,000, or $3,000,000 less than the dollar value for the preceding year, due to the further depreciation of the franc.

Banana Prices High Most of Year

Rum production was about 40,000,000 litres, 5,000,000 litres less than in 1947, 30,000,000 litres of which were exported. Total value was in excess of 2,700 million francs, about 450 million francs above the figure for sugar. Dollar value was about $12,500,000.

The production of bananas continued to increase during 1948 and totalled 90,000 metric tons for both Guadeloupe and Martinique in the proportion of 50,000 tons and 40,000 tons, respectively. Prices were high throughout the year, until mid-November, when they declined from the peak of 92 francs to 40 francs, landed in France. This latter price does not even cover the cost of cutting and shipping the fruit by the producer. The drop in price is due to the abundance of oranges with which the French market has been flooded since November and a very substantial increase in supplies of bananas from the Cameroons and French Guinea, the cost of production in, and freight rates from, both of which place French West Indies bananas at a distinct disadvantage. Despite the low price which prevailed at the end of the year, the value of this crop was in excess of 4,000 million francs, or about $20,000,000.


MAP
OF THE
WEST INDIES
(EASTERN GROUP)
AND
BRITISH GUIANA
Scale of Miles
0 50 100 200 300
65
60
20
15
10
5
VIRGIN ISLANDS
ANGUILLA
ST MARTIN (Fr. & Du.)
BARBUDA
ST KITTS
NEVIS
ANTIGUA
MONTSERRAT
LEEWARD ISLANDS
GUADELOUPE (Fr.)
DOMINICA
MARTINIQUE (Fr.)
WINDWARD ISLANDS
ST LUCIA
BARBADOS
Bridgetown
ST VINCENT
GRENADA
CARIBBEAN SEA
ATLANTIC OCEAN
TOBAGO
Port of Spain
TRINIDAD
S. Fernando
Orinoco R.
VENEZUELA
GEORGETOWN
BRITISH GUIANA
DUTCH GUIANA
BRAZIL
index showing area covered by map

Production of coffee, cocoa and vanilla crops continues to decline, to such an extent in the case of coffee, for example, that Guadeloupe, which formerly had a surplus for export, now must import to cover its requirements. The price of vanilla has fallen to an unprecedented low of about $3.50 per kilogram, compared with more than $9.00 last year. There is some revival in the cultivation of coffee and cocoa, stimulated by the high prices now obtaining for these commodities.

Production of preserves made from local fruit declined very substantially in 1948 to about 3,500 tons as against 13,000 tons in 1947. In fact, guavas and mangoes were the only fruits processed, and a large proportion of the total volume manufactured still remains unsold. The serious decline in this industry is due to imperfections in preparation, unattractiveness of packaging and greater supplies by French metropolitan producers, due to improvement in sugar allocations. It is feared that preserves of local manufacture may no longer be considered a factor in the economy of the French West Indies.

Liqueurs of local manufacture must also be discounted as an element in the purchasing power of these departments, the French producer now being in a position to meet consumption needs with a product of superior quality.

The value of last year's exports is estimated at about 10,500 million francs against 5,900 million francs last year, or $48,000,000 compared with about $50,000,000.

In terms of francs, the value of imports in 1948 was substantially higher than in 1947. The tendency to buy more from France continued. In fact, imports from hard-currency countries were restricted almost exclusively to basic foodstuffs, particularly flour. Consumer goods constituted the principal items in the flow of imports. The better qualities of dress goods and footwear are in improved supply, but cotton goods are still very scarce. Hardware and builders' supplies are more plentiful, but are still far short of meeting demand. Prices are at least 100 per cent higher than those of last year.

Labour Situation Poor Last Year

The labour situation was bad last year. The sole objective of the executive of the local Confederation of Labour, dominated by the communist element, seemed to be that of hampering all phases of activity. If the majority had not refused in many instances to obey strike orders, conditions would have been much worse than they were. Already there are indications that all will not be well in labour circles in 1949. Since Guadeloupe and Martinique are assimilated as departments of France, the fixing of wage scales is not within the province of the local authorities. These are fixed by the French Ministry of Labour.

According to a decree recently published in the French *Official Gazette*, wage rates obtaining in the Paris region, less 30 per cent, are to apply in these departments. Local labour leaders have served notice on the employers that they will not condone what they term discriminatory treatment. Unfortunately, in regard to Guadeloupe, the Prefect seems to have encouraged them in their stand, and a delay in the starting of sugar grinding operations is in prospect again this year. The Prefect of Martinique, on the other hand, has shown firmness in dealing with the unions. He refuses even to discuss the question, claiming that the problem is not within his jurisdiction.

Another problem is that of integral application in these departments of the French social security laws. There can, of course, be no question of equal treatment for residents of France and of these departments within the provisions of such laws.

The election of two members each from Guadeloupe, Martinique and French Guiana to the Council of the Republic (formerly the Senate) was held last November. Moderates were elected with handsome majorities in all three Departments.

A number of building projects were started in 1948, the most ambitious of which was that of "Garden City", a government project to provide adequate housing facilities for senior civil servants, despite almost prohibitive building costs. The housing shortage that was reported last year still shows very little sign of improving.

Guadeloupe was host to the West Indian Conference in 1948. The exchange of views covered a wide field, from tourism to the creation of a Caribbean Industrial Bank. It is too early to determine what practical outcome will result from these discussions, not always on a high level.

Prospects for 1949 are, therefore, not as bright for the French West Indies as they were for 1948. The cane crop is good, however, and provided it can be harvested under fairly favourable conditions, there is reason to expect that sugar production will attain 80,000 metric tons, and rum 30,000,000 litres. Prices promise to be better than in 1948. Banana production should reach 100,000 tons, and prices are expected to improve over present levels.

On the whole, there is reason to expect that purchasing power will be about equal to the 1948 level, thus permitting the French West Indies to meet the cost of essential commodities. Real estate prices show a tendency to decline, possibly due to the prevalence of a tighter money market and the feeling that further devaluation of the franc is not to be feared.

The rise in the cost of living has not yet been arrested, but in this respect also signs are not lacking that some improvement may be anticipated. Discussions over wages are soon to be held between management and labour. If protracted, they will this year again have as their corollary diminishing returns in all phases of the economy at a time when the country can ill afford them.

Repeat Order Placed by Hong Kong for Dairy Cattle From British Columbia

Fifty heifers, consisting of Holstein-Friesians, Ayrshires, Jerseys and Guernseys, en route from Vancouver to strengthen milk supply of island colony in summer months.

CANADIAN dairy cattle, shipped to Hong Kong last year, established such a favourable impression in the island colony that a repeat order was recently placed. Fifty heifers are now on their way across the Pacific aboard the *S.S. Tahfis,* the consignment consisting of twenty-two Holstein-Friesians, eighteen Ayrshires, five Jerseys and five Guernsey cattle. All are grade animals, though a number are registered as purebreds.

Milk supplies of Hong Kong were strengthened last year, when 105 head of dairy cattle were received from Canada. The purchase was sponsored by authorities in the Colony, in order that a continuous supply of fresh milk might be maintained during the summer months. Delivery was made to the Dairy, Farm, Ice and Cold Storage Company, Limited, which was so favourably impressed with the livestock that arrangements were made to secure a second shipment from Canada. Although Canadian cattle were imported by Far Eastern countries before the war, the consignment received last year by Hong Kong was the first consisting of purebreds to leave for the Orient, as a result of private trade, since 1939.

Hong Kong—Unloading the first consignment of dairy cattle to arrive from Canada since the conclusion of hostilities.

DIRECTORY INFORMATION

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

Trade Fair News

Information of particular interest to firms planning participation in the Canadian International Trade Fair, being held in Toronto from May 30 to June 10, 1949, will be published from week to week in this column.

Booking of space in the household furnishings section indicates that Canadian and United Kingdom firms will be the heaviest exhibitors. A firm from the Federation of Malaya, displaying a line of rattans, rattan products, malacca canes and kindred tropical products, is exhibiting at the Fair for the first time. Another initial exhibitor is from French Morocco, displaying a line of household furnishings.

Floor coverings are to be displayed by many firms, the Canadians featuring linoleums and similar coverings, while the United Kingdom firms lean more towards woven rugs and carpets.

Metal and plastic kitchen utensils and equipment are being displayed by several Canadian firms in a variety of combinations. In a strong bid for the market, a British firm is showing a line of sinks and cabinets of stainless steel and vitreous enamel.

The British china firms are returning, as are the Czechoslovakian glass and crystal exhibitors. Included in this section are ten Canadian and British firms, exhibiting at the Trade Fair for the first time.

Wood and plastic wood furniture is being displayed by Canadian firms for the second year.

The Siamese are coming back to display their Niello silver jewellery, handwoven sarongs, precious and semi-precious stones and other handicraft. This year's exhibit is under the aegis of a semi-government organization formed as a direct result of last year's successful display.

A British firm has taken a large display space to exhibit jewellery and silver-plated flatware. Other British firms in this section are displaying flat and hollow-ware of silver, cigarette cases and boxes and candlesticks. The Czechoslovakian ornament manufacturers will be seen again in this section.

A large Canadian clock manufacturer is showing a complete line of clocks, ranging from small travelling clocks to grandfather clocks. The Swiss watchmakers have taken a large footage and, it is hoped, will show their latest development, the "wrist alarm watch".

Dresser sets, travelling sets, silver-plated hollow-ware, baby brushes, cigarette cases and boxes and so forth will be displayed by Canadian firms.

Initial applications indicate that the Food and Beverages Section will form one of the major categories. Twenty-three firms from seven countries have contracted for space in this classification. Distillers of Scotch whisky are represented with six important firms entering for the first time. The Canadian rye whisky distillers are exhibiting again, with some increase in space over last year's displays noted.

Representation by Canadian brewers and wine growers last year is being increased, with several new firms appearing. A substantial group of British brewers is interested in acquiring enough space to erect a replica of an English "pub" in which to display their products.

South Africa is displaying its dried-fruit products for the first time in a new bid for the Canadian market. Czechoslovakia is already in, in this section, along with Luxembourg, France, the British West Indies and Hong Kong.

Canada has the preponderance of exhibitors in space and numbers of firms, followed by the United Kingdom.

The electrical appliances range from nuclear scalpers and geiger counters to refrigerators and power-driven animal clippers. A Scottish firm is exhibiting its line of domestic refrigerators for the second year and is joined by a newcomer in the radio and electronics field. Seven Canadian firms are showing their products for the first time with one repeater adding to his previous display in the shape of an automatic shoe-shine machine.

The musical instruments division of this section is dominated by piano and organ manufacturers, including two newcomers.

Export Deliveries From Bizonal Germany Reached Record High During November

Level was \$67·4 millon, 9 per cent higher than monthly average export for 1948-49 ERP year—Import deliveries up by \$103 million over previous month—Month's export deliveries brought 1948 total at November 30 to \$727·2 million.

By B. J. Bachand, Canadian Economic Representative

Frankfurt, January 21, 1949.—Export deliveries from Bizonal Germany during November climbed to a record level of \$67·4 million, 9 per cent higher than the monthly average export for the 1948-49 ERP year. According to the report of the Joint Export-Import Agency for the month, import deliveries for November increased over the previous month to a figure of \$103 million. Of the latter, 68·4 million was the landed cost of Category "A" or non-commercial import arrivals (including food, seeds, fertilizer and petroleum products) financed by appropriated funds from the United States and the United Kingdom. The remainder, \$34·6 million, was the value of Category "B", or commercial imports.

The month's export deliveries brought the 1948 total, through November 30, to \$527·2 million. The cumulative value of the import deliveries for the eleven months was \$1,269 million, of which approximately \$892·6 million was for 8,839,381 metric tons of Category "A" goods, and the remainder Category "B". The Bizonal Area thus had an adverse balance of trade to the extent of \$742·2 million, with its exports paying for 41·5 per cent of its imports. For the year 1947, exports from the United States and United Kingdom zones financed only about one-quarter of their imports.

Another favourable aspect indicated in the report is that in November, for the third successive month, "general" exports (manufactured goods and miscellaneous raw materials) continued to be the influential factor in the increasing volume of total exports. This type of export deliveries reached a value of \$29·7 million, or 44 per cent of the total, during the month, and a cumulative figure of \$189·5 million, or 35·8 per cent of the total for the eleven months.

The United Kingdom continued to hold its place as the leading buyer nation of Bizonal goods, having bought \$11·8 million worth in November. This made a total of \$81·9 million for the period January 1 to November 30, or 15·5 per cent of the United States and United Kingdom zones' output for that period, and almost achieving a balance of trade. The only other country approximating a balance of trade with Bizonal Germany was Sweden, with exports to Bizonia valued at \$21·3 million and imports of \$20·2 million.

Canada Greatly Reduced Number of Items Requiring Export Permits Last Year

Relaxations in export controls have resulted in reduction from 520 items to 275 items—Over 50 commodities removed from control on February 8, 1949—Export control regulations consolidated.

THROUGH relaxations in export control regulations, the number of items requiring export permits has been reduced from 520 to 275 since January 1, 1948. In the latest relaxation, effective February 8, 1949, the following items were removed from export control:

Group 1—Agricultural and Vegetable Products

Corn flour or corn starch.
Fibre flax seed.
Field crop seeds—
Beans (field) except registered and certified grades.
Peas (field) except registered and certified grades.
Fruits—
Jam, jelly and marmalade.
Peaches in airtight metal containers, or frozen.
Pears in airtight metal containers.
Plums (including Italian prunes and Italian prune plums), in airtight metal containers.
Malt syrup and malt syrup powder.
Malt, extract of.
Vegetables—
Baked beans and pork and beans, in airtight metal containers.
Beans (green and wax) in airtight metal containers or frozen.
Corn, in airtight metal containers, or frozen.
Field peas (including split peas).
Pea beans (navy or white beans).
Peas in airtight metal containers or frozen.
Tomatoes, tomato paste, pulp and puree, and tomato juice in airtight metal containers.
Vegetable oils and fats, edible and inedible, processed or crude—linseed.
Vegetable oil seeds and vegetable and other oil-bearing raw materials—flax seed, oil variety.

Group 2—Animals and Animal Products

Animal, fish and marine mammal oils, fats and greases, edible and inedible—
Fish liver oils—cod.
Marine mammal oils—sperm.
Fish and fishery products—halibut, fresh or frozen; livers, fish.
Honey, processed honey, and imitations of honey.

Group 5—Iron and Steel (including Alloy Steel) and their products

Iron and steel—iron ore and concentrates.
Replacement parts and accessories for passenger automobiles, chassis and engines.
Automobile tire-service equipment and parts.
Axes.
Bicycles.
Bicycle parts and accessories.
Blanks for tool bits.
Bolts, nuts, screws, rivets and washers.
Cutlery.
Electrical machinery, apparatus and parts and electrical appliances—irons, radios, toasters, vacuum cleaners.
Engines, diesel and semi-diesel, marine, stationary and portable.
Parts for engines, diesel and semi-diesel, marine, stationary and portable.
Engines, internal combustion, n.o.p.
Parts for engines, internal combustion, n.o.p.
Engines, steam.
Equipment for the production of tetraethyl lead, aviation gasoline and aviation lubricating oil.
Fasteners, dome, snap, zipper or other.
Flax machines of all kinds.
Hacksaw blades, hand and power.

Hardware, saddlery and harness.
Household machinery and parts.
Lamps and lanterns.
Lawn mowers.
Motorcycles.
Motorcycle parts and accessories.
Replacement parts and accessories for motor trucks, and buses, chassis and engines.
Needles.
Office machinery and appliances, and parts therefor.
Safes and vaults, and equipment and parts therefor.
Scales, balances and weights.
Skates.
Steel wool.

Group 6—Non-ferrous Metals and their products
Electrical equipment and parts—wire, bare.
Screen cloth, industrial and domestic.

Group 7—Non-metallic Minerals and their products
Glass—Cullet (broken glass), including ground glass; glass, plate, window and sheet.

Group 8—Chemical and allied products
Caustic soda (sodium hydroxide).
Dextrine and combinations of starch and dextrine using 20 per cent or more corn.
Glue, n.o.p., over $25.
Glycerin.
Molasses and syrups produced from cane or beet, not intended for human consumption, over $25.
Soda ash (sodium carbonate).
Streptomycin, in all forms.
Vitamins and viosterols—medicinal fish oil and fish liver oil.

Effective February 8, 1949, export control was reimposed on carbon black to eliminate the possibility of having Canada used as a channel for shipments from the United States to European countries.

Copies of the new consolidated export permit regulations may be obtained by writing the Export Permit Branch, Department of Trade and Commerce, Ottawa.

India Invites Tenders for Hydro-Electric Equipment

Tenders are invited by the Irrigation Branch, Public Works Department, Government of the United Provinces, India, for hydro-electric equipment required for power stations 1 and 2 of the Yamuna Hydro-Electric Scheme, including hydraulic turbines, generators, switchgear, transformers and other accessories.

Tenders close with the Chief Engineer, United Provinces, Public Works Department, Irrigation Branch, Lucknow, United Provinces (India), at 1 p.m. of April 15, 1949. Certain schedules call for quotations to cover both hydraulic and electrical equipment as well as erection at site. Among the main items of apparatus are the following:

Hydraulic Turbines—Six vertical shaft adjustable blade (Kaplan), propeller type, rated 11,500 h.p. each.

Generators—Six 10,000 kv.a., ·85 p.f., 11,000-volt, 3-phase, 50-cycle.

Transformers—Six 400 kv.a., 3-phase, 50-cycle, delta-star 11,000/400/-230 volt; six 10,000 kv.a., 3-phase, 50-cycle, delta-star 11,000/33,000 volt; two 20,000 kv.a., 3-phase, 50-cycle, star-star 22/132 kv.

Switchgear—Complete with control boards, etc., are required for 400 volts, 11 kv., 33 kv., and 132 kv.

A limited number of bound copies of these invitations for tenders, which include data, schedules, specifications and drawings, are held by the Department of Trade and Commerce in Ottawa, and are available to interested Canadian manufacturers in order of applications received, at a cost of $6.00 per copy.

Currency and Labour Problems Influence French Economy

Franc devalued in January, 1948, and official free market for the dollar opened—Attempt made to disrupt economic life of nation by series of chain strikes—External debt considerably increased.

By J. P. Manion, Commercial Secretary for Canada

(Editor's Note—This is the second in a series of reports on economic conditions in France during 1948, prepared for *Foreign Trade.*)

PARIS, January 22, 1949.—France's relatively placid political evolution in 1948 fails to reveal the many economic undercurrents which marked the year. Certain visible signposts, however, such as the devaluation of the franc and labour strife, charted the economic course.

On January 26, 1948, the franc was devalued from 125 francs to the dollar to 214·39 francs to the dollar. This was followed by the opening of an official free market for the dollar, and gave rise to a complex exchange arrangement by which there were actually three rates of exchange for the American dollar. The "free" market was pegged at about 304 francs to the dollar, and it was decreed that commercial transactions should take place at the mean rate of exchange between 214 and 304, or at about 256 francs to the dollar. However, government purchases of coal, wheat, petroleum and other necessities were accounted for at 214 to the dollar, while financial transactions, including remittances and the payment of freight, were paid for at the "free" market rate. No free market was opened for soft currencies, and the result was that all transactions in those currencies were paid for at a rate equal to their conversion rate against the dollar at 214. These currencies, including sterling, were therefore discounted to the extent of about 21 per cent.

This cumbersome system continued until October 17, when, chiefly at the instance of the United Kingdom, a realignment took place. The values of soft currencies, or others not treated on the "free" market, were brought to the level of the mean rate of exchange for American dollars, and all transactions at the 214 rate of exchange were eliminated.

In the meantime, anti-inflationary devices were the object of experiment on the domestic front, and for a time were successful. All 5,000-franc notes were withdrawn from circulation on January 29. This had the effect of reducing circulation by about 15 per cent to 765,000 million francs, but was only temporary in its effect, since circulation had again risen to 980,000 million just before Christmas. By the same operation, deposits were sharply increased, only to fall towards the end of the year to 175,000 million francs.

Many Strikes Occurred in Past Year

On the labour front, there was definite evidence early in the year of a general communist-inspired attempt to disrupt the economic life of the nation by "chain" strikes, following one upon the other. On September 23, a general 15 per cent increase in wages was granted throughout the country to balance to some extent the rising cost of living. Then on October 4, the most costly strike of the year broke out in the nationalized coal mines, purportedly to protest against the government's avowed intention of reducing costs by discharging administrative personnel. There can be no doubt that the political purpose of the strike was to frustrate the otherwise remarkable recovery in production being effected as a result of Marshall Aid. The strike is estimated to have lost between four and five million tons of coal, or roughly 10 per cent of the year's production, and has forced France to reorientate her import policy to include more coal and thus reduce her imports of reconstruction goods.

On the other hand, the strike had a salutary effect on public opinion. Even the dock-workers, who had intended to go out on strike in support of the coal miners and as a follow-up to the New York dockers' strike, thought better of it in the face of an angry nation, and the remainder of the year passed away quietly enough.

In the course of the year, commercial agreements, including compensation and payments arrangements, were concluded with Italy (March 18), Spain (May 1), Poland (May 26), Portugal, Egypt and the Netherlands (June 10), Czechoslovakia (August 6), and the Bizone (November 18).

The public finance statistics of France are available only to the end of August, 1948, and will not correctly reflect the situation at the end of the year. They should nevertheless permit some estimate of the situation to be made. With respect to the public debt, it seems desirable to indicate not only the difference between the present situation and the prewar position, but also the short-term increase which has taken place since December, 1947.

Public Debt of France

	Aug. 31, 1939	Dec. 31, 1947	Aug. 31, 1948
		(Million francs)	
Internal debt—			
Long-term bonds	242,374	556,743	571,395
Perpetual debt	55,036	182,137	182,162
Short- and medium-term	99,182	813,521	849,659
Bank loans	36,042	665,196	776.524
Total	432.634	2,117,597	2,379,740
External debt	13,108	381,476	695,917
Grand total	445,742	2,499,073	3,075,657

There are one or two significant conclusions which may be drawn from the above table. Long-term bonds and the perpetual debt would be the normal form of investment on the part of individuals confident of their nation's finances. Yet, although the foreign exchange value of the franc is over six times lower than it was in 1939, the combined total of these two items has gone up by only 2½ times since that period, showing a net reduction in its value of about 60 per cent.

Government Forced to Use Institutional Investment for Deficit Financing

The government, therefore, has been obliged to have recourse to "institutional" investment, by means of short- and medium-term issues, and to bank loans, for a large part of its deficit financing. Short- and medium-term financing has gone up by almost ten times, and bank loans by over 20 times for a combined increase of 1,200 per cent during the prewar period. Taking the foreign exchange value of the franc as a criterion, this would mean a doubling of the real value of such financing over a ten-year period. This increase does not take into account any benefit which the government may have obtained from the increase in circulation.

The increase in the external debt may be partially accounted for by loans from the International Monetary Fund, the World Bank, and the Export-Import Bank. There also may be counted such credits as have been advanced under lend-lease, the Canadian credit, and loans under ECA. It is significant that the largest part of the external debt, 551,000 million francs out of the total of 695,000 million francs, is repayable on an annuity basis, which is the form of repayment generally adopted for government-to-government transactions. The total is nevertheless over two billion, which appears to be more than can be accounted for from sources which come immediately to mind.

Agricultural Production in Italy Reached Higher Level Last Year

Output estimated at 90 per cent of prewar—Fewer imports necessary to meet total requirements — Italian diet has improved — Many problems must be solved before real progress achieved.

By A. P. Bissonnet, Assistant Commercial Secretary

(Editor's Note—This is the first in a series of articles on economic conditions in Italy, prepared by Mr. Bissonnet for publication in *Foreign Trade.*)

ROME, January 12, 1949.—Italian agriculture achieved a level of production in 1948 superior to that of 1947 and quoted as being as high as 90 per cent of prewar output. Food, therefore, was available in greater quantity and fewer imports were necessary to meet total requirements. Before the war, 92 per cent of the calories consumed were produced within the country. This figure dropped to 35 per cent immediately following the war, and then improved to 70 per cent in 1947 and to 80 per cent in 1948. The individual was thus being better fed: in 1938 the average calory consumption per day was 2,637, in 1947 it was 2,280, and was 2,500 in 1948.

Agricultural Production in Italy

	1936-39 Average	1947	1948	1948 as per cent of 1936-39
Wheat (bushels)	277,534,000	171,715,000	227,395,000	81.9
Corn (bushels)	116,837,000	75,729,000	92,823,000*	79.4
Rice (tons)	729,000	607,000	548,000*	75.2
Other cereals (tons)	907,000	708,000	807,000	89.0
Sugar beet (tons)	3,206,000	2,187,000	3,146,000*	98.1
Citrus fruits (tons)	723,000	629,000	681,000	94.2
Olive oil (tons)	225,000	128,000	253,000	112.0
Tobacco (tons)	42,000	44,000	75,000	179.8
Wine (hectolitres)	38,000,000	31,858,000	33,471,000*	87.8

*Estimated.

It will be noted that an increase is shown in the all-important wheat crop, and increases in production of legumes and hemp were also affected. Vegetables, grapes, oranges and tangerines remained at about the same level as in 1947, while a decrease is noted in the output of all kinds of fresh and dried fruit, and olives. Livestock increased slightly during 1947 and 1948, and at present the total is five per cent less than that of prewar.

Many Problems Must be Solved

Despite the relatively improved agricultural situation, due to increased crop yields in 1948, many problems must be solved before any real progress may be made. The farming methods employed, the processing of production, and the distribution of farm products are all tremendously outdated by

North American standards. Efforts to introduce new methods are being made upon the recommendation of the E.C.A. mission. Hybrid corn, for example, is being introduced into the country for the first time, and it is hoped that production will be increased, eventually, by 50 per cent. However, the introduction of modern agricultural practices is being retarded by the small size of the average farm, the great variety of crops and the ignorance of farm labour, as well as resistance to the use of labour-saving devices, and the shortage of capital. All of these factors must be contended with, together with the many political problems which arise if substantial progress is to be made in the ensuing years.

Trade and Tariff Regulations

Ceylon Permits Imports of Paper and Certain Leather Footwear

Bombay, January 25, 1949.—(FTS)—Applications for the importation into Ceylon of paper, children's and ladies' leather footwear from any source may now be submitted for consideration. The application should be accompanied by a firm offer.

Catalogues Subject to Surcharge in Costa Rica

Guatemala City, February 8, 1949.—(FTS)—Catalogues and other advertising matter have been classified in the second category of the Costa Rican exchange priority schedule and are, as a consequence, subject to a surcharge of 30 per cent of the duty-paid value if imported by parcel post or freight. It is, therefore, recommended that all such advertising material be sent to Costa Rica as printed matter, thus avoiding the surcharge.

Benelux Countries to Continue Suspension of Certain Import Duties

Brussels, February 3, 1949.—(FTS)—The Benelux countries, consisting of Belgium, Netherlands and Luxembourg, have continued to suspend or reduce the duties on a number of commodities for another year, beginning January 1, 1949, according to a Belgian decree, published in the official *Moniteur Belge* of December 25, 1948. (See *Foreign Trade* of January 24, 1948, for the suspensions and reductions in effect during the year 1948.)

Included in the list of items on which the duty continues to be suspended, of special interest to Canada, are: Fresh, salted, dried, smoked or cooked meat; canned meats; cheese; wheat flour; linseed oil; sardines preserved in oil; canned salmon; infants' or invalids' food; wood simply sawn lengthwise; veneering sheets; and bags or sacks for packing.

The following is a list of items of interest to Canada on which the reduced duty is continued until December 31, 1949:

		Normal duty	Reduced duty
Newsprint	ad val.	10%	6%
Cotton yarn, not put up for retail sale	ad val.	6%	3%
Slippers and house footwear	ad val.	24%	15%
Leather footwear	ad val.	24%	15%
Rubber footwear	ad val.	24%	15%
Bicycle parts	ad val.	12%	6%

The complete list of suspended and reduced duties is available in the Foreign Tariffs Section, Department of Trade and Commerce.

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 offices in the areas concerned:

Ottawa—Foreign Trade Service, Department of Trade and Commerce

Calgary—Board of Trade.
Charlottetown—Board of Trade.
Edmonton—Canadian Manufacturers' Association.
Fredericton—Chamber of Commerce.
Halifax—Board of Trade.
Hamilton—Chamber of Commerce.
Kitchener—Chamber of Commerce.
Moncton—Board of Trade.
Montreal—Montreal Board of Trade.
Quebec City—Board of Trade.
Regina—Chamber of Commerce.
Saint John—Board of Trade.
Saskatoon—Board of Trade.
Sherbrooke—Chamber of Commerce.
Toronto—Canadian Manufacturers' Association.
Vancouver—H. W. Brighton, Department of Trade and Commerce, 355 Burrard Street.
Victoria—Department of Trade and Industry.
Welland—Board of Trade.
Windsor—Chamber of Commerce.
Winnipeg—Canadian Manufacturers' Association.

G. A. Browne, Acting Canadian Government Trade Commissioner in Karachi, returned home on leave last month, and commenced a tour of Canada in Vancouver on January 21. Mr. Browne opened Canada's trade office in Karachi in September, 1947.

Welland—February 19.
Brantford—February 21.
Kitchener—February 22.
Ottawa—February 23-24.
Montreal—March 21-April 2.
Quebec City—April 4-5.

Ocean Fleet Registered at Port Alfred, Quebec

Port Alfred, Que., is now the port of registry for eleven ships operated by the Saguenay Terminals, Limited, as it is their northern terminus and destination of bauxite ore from British Guiana for the aluminum plant at Arvida. Units of the fleet have been renamed, as follows:

Old Name	New Name
Eastwood Park	*Sunavis*
Turret Cape	*Sunchief*
Bloomfield Park	*Sundale*
Wentworth Park	*Sundial*
Highland Park	*Sunjewel*
Simcoe Park	*Sunmont*
Shakespeare Park	*Sunprince*
Grafton Park	*Sunray*
Fort Columbia	*Sunrell*
Fort Panmure	*Sunvalley*
Peribonka	*Sunwalt*
Wellington Park	*Sunwhit*

The *S.S. Sunwalt* is registered in the United Kingdom.

Ocean-Going Sailing Schedules

Information contained in the following list of sailings is furnished by steamship companies and agents concerned. This is the latest available, and is subject to change after *Foreign Trade* has gone to press.

The loading date and name of ship are not indicated in some instances, as information available is not sufficiently definite to mention the ship concerned. The name of the operator is given, however, and exporters should seek further details from the operator or agent concerned.

Ships loading within ten days of the publication date of this issue are not included.

Departures from Halifax

*Sails from Saint John about three days earlier.

†Calls at Saint John a few days later.

(r) Indicates refrigerated cargo space.

Destination	Loading Date	Vessel	Operator or Agent
Argentina—			
Buenos Aires	March 9–13	*Bowgran*	Cunard Donaldson
Buenos Aires	March 10–15	*Mormactide*	Montreal Shipping
Buenos Aires	March 26–30	*Royal Prince*	Furness Withy
Belgium—			
Antwerp	Feb. 26–Mar. 5	*Vasaholm*	Swedish American
Antwerp	March 10–19	*Rouen*	Furness Withy
Brazil—			
Rio de Janeiro, Santos	March 9–13	*Bowgran*	Cunard Donaldson
	March 10–15	*Mormactide*	Montreal Shipping
	March 26–30	*Royal Prince*	Furness Withy
Celebes—			
Macassar	March 12–16	*Tarakan*	Cunard Donaldson
China—			
Shanghai	March 5–15	*Oceanside*	March Shipping
Colombia—			
Barranquilla	March 4–8	†*Brush*	Swedish American
Barranquilla	March 24–28	†*Polykarp*	Swedish American
Cuba—			
Santiago, Havana	March 1–3	*Lake Traverse*	Pickford and Black
	March 8–12	†*Krageholm*	Swedish American
	March 21–24	†*Tunaholm*	Swedish American
Santiago	March 25–29	*Dufferin Bell*	Pickford and Black
Denmark—			
Copenhagen	Feb. 26–Mar. 5	*Vasaholm*	Swedish American
Dominican Republic—			
Ciudad Trujillo	March 1–3	*Lake Traverse*	Pickford and Black
Ciudad Trujillo	March 25–29	*Dufferin Bell*	Pickford and Black
Finland—			
Helsinki	Feb. 26–Mar. 5	*Vasaholm*	Swedish American
France—			
Le Havre	Feb. 26–Mar. 5	*Vasaholm*	Swedish American
Le Havre	March 10–19	*Rouen*	Furness Withy
Marseilles	Mar. 5–10	*Capo Arma*	Furness Withy

Destination	Loading Date	Vessel	Operator or Agent
Germany—			
Bremen, Hamburg	Feb. 26–Mar. 5	*Vasaholm*	Swedish American
Haiti—			
Port au Prince	March 25–29	*Dufferin Bell*	Pickford and Black
Hong Kong	March 5–15	*Oceanside*	March Shipping
India and Pakistan—			
Karachi, Bombay, Calcutta	March 5–15	*Oceanside*	March Shipping
Indonesia—			
Batavia, Soerabaya, Belawan-Deli, Cheribon, Samarang	March 12–16	*Tarakan*	Cunard Donaldson
Batavia, Soerabaya, Belawan-Deli	February 22–26	*Santa Clara Victory*	Isthmian Steamships
Italy—			
West Coast Ports	March 5–10	*Capo Arma*	Furness Withy
Malaya—			
Penang, Port Swettenham	February 22–26	*Santa Clara Victory*	Isthmian Steamships
	March 12–16	*Tarakan*	Cunard Donaldson
Mexico—			
Veracruz, Tampico	March 8–12	†*Krageholm*	Swedish American
	March 21–24	†*Tunaholm*	Swedish American
Netherlands—			
Amsterdam, Rotterdam	Feb. 26–Mar. 5	*Vasaholm*	Swedish American
Netherlands Antilles—			
Curaçao	March 4–8	†*Brush*	Swedish American
Curaçao	March 24–28	†*Polykarp*	Swedish American
Newfoundland—			
St. John's	February 22–25	*Fort Amherst*	Furness Withy
St. John's	February 23	*Island Connector*	Clarke Steamships
St. John's	February 24–27	*Fort Townshend*	Furness Withy
St. John's	February 24–26	*Nova Scotia* (r)	Furness Withy
St. John's	Feb. 26–Mar. 1	*Wellington Kent*	Newfoundland Canada
St. John's	March 2–5	*Keltic*	Shaw Steamships
St. John's	March 3–6	*Fort Amherst*	Furness Withy
St. John's	March 4	*Island Connector*	Clarke Steamships
St. John's	March 4–7	*Blue Cloud*	Montreal Shipping
St. John's	March 7–10	*Wellington Kent*	Newfoundland Canada
St. John's	March 10–13	*Fort Townshend*	Furness Withy
St. John's	March 14	*Island Connector*	Clarke Steamships
St. John's	March 14–17	*Newfoundland* (r)	Furness Withy
St. John's	March 15–18	*Wellington Kent*	Newfoundland Canada
St. John's	March 18–21	*Blue Seal*	Montreal Shipping
St. John's	March 23	*Island Connector*	Clarke Steamships
St. John's	March 27–30	*Blue Peter II*	Montreal Shipping
Norway—			
Oslo, Kristiansand, Stavanger, Bergen	Feb. 26–Mar. 5	*Vasaholm*	Swedish American
Poland—			
Gdynia, Gdansk	Feb. 26–Mar. 5	*Vasaholm*	Swedish American
Puerto Rico—			
San Juan	March 4–8	†*Brush*	Swedish American
San Juan	March 24–28	†*Polykarp*	Swedish American

Departures from Halifax—*Concluded*

Destination	Loading Date	Vessel	Operator or Agent
Saudi Arabia—			
Jeddah	February 22–26	*Santa Clara Victory*	Isthmian Steamships
St. Pierre-Miquelon	March 2–5	*Keltic*	Shaw Steamships
	March 18–21	*Blue Seal*	Montreal Shipping
Singapore	February 22–26	*Santa Clara Victory*	Isthmian Steamships
	March 12–16	*Tarakan*	Cunard Donaldson
Sweden—			
Gothenburg, Malmo, Norrkoping, Stockholm	Feb. 26–Mar. 5	*Vasaholm*	Swedish American
United Kingdom—			
Avonmouth, Swansea	March 17–21	*Bristol City*	Furness Withy
Bristol, Swansea	March 7–15	*Boston City*	Furness Withy
Liverpool	March 11–16	*Ascania* (r)	Cunard Donaldson
Liverpool	March 14–17	*Newfoundland* (r)	Furness Withy
London	March 27–31	*Samaria* (r)	Cunard Donaldson
Southampton	March 17	*Aquitania*	Cunard Donaldson
Southampton	April 7	*Aquitania*	Cunard Donaldson
Uruguay—			
Montevideo	March 9–13	*Bowgran*	Cunard Donaldson
Montevideo	March 10–15	*Mormactide*	Montreal Shipping
Montevideo	March 26–30	*Royal Prince*	Furness Withy
West Indies—			
Jamaica	March 1–3	*Lake Traverse*	Pickford and Black
Jamaica	March 8–12	†*Krageholm*	Swedish American
Jamaica	March 21–24	†*Tunaholm*	Swedish American
Jamaica	March 25–29	*Dufferin Bell*	Pickford and Black
Jamaica, Bahamas	March 14	*Canadian Cruiser*	Canadian National
Antigua, Barbados, Bermuda, British Guiana, Dominica, Grenada, Montserrat, St. Kitts, St. Lucia, St. Vincent, Trinidad	Feb. 22–Mar. 3	*Alcoa Runner*	Alcoa Steamships
	March 4	**Lady Nelson* (r)	Canadian National
	March 8–17	*Alcoa Pilgrim*	Alcoa Steamships
	March 22–31	*A Ship*	Alcoa Steamships
	April 8–17	*A Ship*	Alcoa Steamships
Venezuela—			
La Guaira, Maracaibo, Puerto Cabello	March 4–8	†*Brush*	Swedish American
	March 24–28	†*Polykarp*	Swedish American

Fats and Oils Removed from Export Control

Washington, February 14, 1949.—(FTS)—Fats and oils have been removed from world allocation, in accordance with a decision reached by the International Emergency Food Committee, of which Canada and the United States are members. Validated licences will no longer be required for the exportation of fats, oils and oil-bearing seeds to countries other than those under area control. Export controls on inedible fats and oils were removed on February 7, 1949.

Departures from Saint John

*Sails from Halifax a few days earlier.
†Calls at Halifax a few days later.
(r) Indicates refrigerated cargo space.

Destination	Loading Date	Vessel	Operator or Agent
Africa-East—			
Lourenço Marques...	March 17	*Grelrosa*	Elder Dempster
Lourenço Marques...	March 25	*Forest*	Shipping Limited
Lourenço Marques...	April 1–12	*Cottrell*	Elder Dempster
Lourenço Marques.. Beira..............	March 28	*Cargill*	Elder Dempster
	April 25	*Chandler*	Elder Dempster
Lourenço Marques.. Beira.............. Mombasa..........	Feb. 16–Mar. 3	*Thorscape*	Kerr Steamships
Africa-South— Cape Town......... Port Elizabeth...... East London........ Durban............	Feb. 16–Mar.3	*Thorscape*	Kerr Steamships
	March 17	*Grelrosa*	Elder Dempster
	March 25	*Forest*	Shipping Limited
	March 28	*Cargill*	Elder Dempster
	April 1–12	*Cottrell*	Elder Dempster
	April 25	*Chandler*	Elder Dempster
Australia— Brisbane........... Sydney............ Geelong............ Melbourne.......... Adelaide...........	Late March	*Ottawa Valley*	Montreal Australia New Zealand Line
Belgium—			
Antwerp............	March 1	*Prins JohanWillem Friso*	Shipping Limited
Antwerp............	March 6–12	*Marchcape*	Montreal Shipping
Antwerp............	March 10	*Hedel*	Shipping Limited
Antwerp............	March 18–28	*Beaconsfield*	Cunard Donaldson
British Honduras—			
Belize..............	March 14–18	†*Sunprince*	Saguenay Terminals
Canal Zone—			
Cristobal...........	March 14–18	†*Sunprince*	Saguenay Terminals
China—			
Shanghai............	April 1–2	*City of Sydney*	McLean Kennedy
Colombia—			
Barranquilla........	Feb. 28–Mar. 2	†*Sundial*	Saguenay Terminals
Costa Rica—			
Port Limon.........	March 14–18	†*Sunprince*	Saguenay Terminals
Cuba—			
Havana.............	Feb. 28–Mar. 5	*Star of Suez* (r)	Federal Commerce
Havana.............	March 20–25	*Federal Mariner*	Federal Commerce
Dominican Republic—			
Ciudad Trujillo.....	Feb. 28–Mar. 2	†*Sundial*	Saguenay Terminals
Ciudad Trujillo.....	March 14–18	†*Sunprince*	Saguenay Terminals
Egypt— Alexandria......... Port Said.......... Port Sudan.........	March 18–21	*John Bakke*	Kerr Steamships
France—			
Le Havre...........	March 1	*Prins Johan Willem Friso*	Shipping Limited
Le Havre...........	March 10	*Hedel*	Shipping Limited
Gemany—			
Hamburg...........	March 1	*Prins Johan Willem Friso*	Shipping Limited
Hamburg...........	March 6–12	*Marhcape*	Montreal Shipping
Hamburg...........	March 10	*Hedel*	Shipping Limited
Hamburg	March 18–28	*Beaconsfield*	Cunard Donaldson

Destination	Loading Date	Vessel	Operator or Agent
Greece—			
Piraeus	March 7–14	*Italo Marsano*	Montreal Shipping
Guatemala—			
Puerto Barrios	March 14–18	†*Sunprince*	Saguenay Terminals
Haiti—			
Port au Prince	Feb. 28–Mar. 2	†*Sundial*	Saguenay Terminals
HongKong	April 1–2	*City of Sydney*	McLean Kennedy
India and Pakistan—			
Chittagong, Karachi, Bombay, Madras, Calcutta, Cochin	Feb. 22–Mar. 3	*Martha Kleppe*	McLean Kennedy
	March 22–30	*City of Delhi*	McLean Kennedy
Madras	April 1–2	*City of Sydney*	McLean Kennedy
Ireland—			
Dublin	March 11–15	*Ramore Head*	McLean Kennedy
Italy—			
Genoa, Naples	March 7–14	*Italo Marsano*	Montreal Shipping
Mediterranean—			
Central and Western Areas	March 7–14	*Italo Marsano*	Montreal Shipping
Mexico—			
Veracruz, Tampico	Feb. 28–Mar. 5	*Star of Suez* (r)	Federal Commerce
	March 20–25	*Federal Mariner*	Federal Commerce
Netherlands—			
Rotterdam	March 6–12	*Marchcape*	Montreal Shipping
Rotterdam, Amsterdam	March 1	*Prins Johan Willem Friso*	Shipping Limited
	March 10	*Hedel*	Shipping Limited
	March 18–28	*Beaconsfield*	Cunard Donaldson
Netherlands Antilles—			
Curaçao	March 14–18	†*Sunprince*	Saguenay Terminals
New Zealand			
Auckland, Wellington, Lyttleton, Dunedin, Bluff	March 6–14	*Stafford*	Montreal Australia New Zealand Line
Northern Ireland—			
Belfast	March 6–10	*Lord Glentoran*	McLean Kennedy
Belfast	March 26–30	*Torr Head*	McLean Kennedy
Norway—			
Oslo, Kristiansand, Stavanger, Bergen	Early March	*Lyngenfjord*	March Shipping
Palestine—			
Tel-Aviv, Haifa	March 4	*Absirto*	Shipping Limited
Philippines—			
Manila	April 1–2	*City of Sydney*	McLean Kennedy
Portugal—			
Lisbon	March 7–14	*Italo Marsano*	Montreal Shipping
Saudi Arabia—			
Jeddah	March 18–21	*John Bakke*	Kerr Steamships

Departures from Saint John—*Concluded*

Destination	Loading Date	Vessel	Operator or Agent
Singapore	April 1–2	*City of Sydney*	McLean Kennedy
United Kingdom—			
Avonmouth	March 5–13	*Dorelian* (r)	Cunard Donaldson
Swansea	March 25–31	*Norwegian* (r)	Cunard Donaldson
Glasgow	March 5–13	*Lismoria* (r)	Cunard Donaldson
Glasgow	Mar. 30–Apr. 6	*Moveria* (r)	Cunard Donaldson
Liverpool	Feb. 28–Mar. 5	*Vasconia* (r)	Cunard Donaldson
Liverpool	March 6–10	*Lord Glentoran*	McLean Kennedy
Liverpool	March 11–15	*Ramore Head*	McLean Kennedy
Liverpool	March 13–20	*Asia* (r)	Cunard Donaldson
Liverpool	March 26–30	*Torr Head*	McLean Kennedy
London	March 1–7	†*Beaverlake* (r)	Canadian Pacific
London	March 2	*Fort Musquarro*	Cunard Donaldson
London	March 5–12	*Arabia* (r)	Cunard Donaldson
London	March 10–17	*Valacia* (r)	Cunard Donaldson
Manchester	March 2–5	*Manchester Regiment* (r)	Furness Withy
Manchester	March 9–12	*Manchester Progress* (r)	Furness Withy
Manchester	March 16–19	*Manchester Commerce* (r)	Furness Withy
Newcastle	Feb. 28–Mar. 5	*Cairnvalona*	Furness Withy
Leith	Mar. 27–23	*Cairnavon*	Furness Withy
Venezuela			
La Guaira	Feb. 28–Mar. 2	†*Sundial*	Saguenay Terminals
Maracaibo	March 14–18	†*Sunprince*	Saguenay Terminals

Departures from Vancouver

Ships listed under "Departure 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	March 23	*Silverteak*	Dingwall Cotts
Lourenço Marques	April	*Silversandal*	Dingwall Cotts
Lourenço Marques	May	*Radja*	Dingwall Cotts
Africa-South—			
Cape Town / Port Elizabeth / East London / Durban	March 23	*Silverteak*	Dingwall Cotts
	April	*Silversandal*	Dingwall Cotts
	May	*Radja*	Dingwall Cotts
Argentina—			
Buenos Aires	March 1	*Falkanger*	Empire Shipping
Buenos Aires	April 4	*Ravnanger*	Empire Shipping
Australia—			
Sydney / Melbourne / Adelaide	March 17–18	*Parrakoola*	Empire Shipping
Sydney	March 18	*Aorangi*	Canadian Australasian
Belgium—			
Antwerp	March 28	*Vire*	Empire Shipping
Antwerp	March 28	*Paraguay* (r)	Gardner Johnson
Antwerp	April 6–9	*Golden Gate*	Gardner Johnson
Brazil—			
Rio de Janeiro	March 1	*Falkanger*	Empire Shipping
Santos	April 4	*Ravnanger*	Empire Shipping

Departures from Vancouver—*Continued*

Destination	Loading Date	Vessel	Operator or Agent
Ceylon—			
Colombo...........	March 18	*Silverash*	Dingwall Cotts
Colombo...........	April 10	*Höegh Merchant*	Dingwall Cotts
Chile—			
Antofagasta........	March 1	*Falkanger*	Empire Shipping
Valparaiso..........	April 4	*Ravnanger*	Empire Shipping
China—			
Shanghai...........	March 4-5	*India Mail*	Canadian Blue Star
Shanghai...........	March 26-27	*Vingnes*	Empire Shipping
Colombia—			
Barranquilla.......	March 13	*Glimmaren*	Empire Shipping
Buenaventura......	March 27	*Don Anselmo*	Empire Shipping
Costa Rica—			
Puntarenas..........	March 13	*Glimmaren*	Empire Shipping
Puntarenas..........	March 27	*Don Anselmo*	Empire Shipping
El Salvador—			
La Libertad........	March 13	*Glimmaren*	Empire Shipping
La Libertad........	March 27	*Don Anselmo*	Empire Shipping
Fiji—			
Suva...............	March 3	*Thor I*	Empire Shipping
Suva...............	March 18	*Aorangi*	Canadian Australasian
France—			
Le Havre..........	March 28	*Vire*	Empire Shipping
Marseilles..........	March 23	*Tritone*	Empire Shipping
Germany—			
Hamburg...........	March 28	*Paraguay* (r)	Gardner Johnson
Hamburg...........	April 6-9	*Golden Gate* (r)	Gardner Johnson
Guatemala—			
San Jose...........	March 13	*Glimmaren*	Empire Shipping
San Jose...........	March 27	*Don Anselmo*	Empire Shipping
Hawaii—			
Honolulu...........	Feb. 18-Mar. 2	*Lake Atlin*	Anglo Canadian
Hong Kong.........	March 4-5	*India Mail*	Canadian Blue Star
India and Pakistan—			
Madras............ Calcutta...........	April 6	*Silverwalnut*	Dingwall Cotts
Calcutta........... Bombay...........	March 18	*Silverash*	Dingwall Cotts
Karachi........... Bombay...........	April 18	*Höegh Merchant*	Dingwall Cotts
Indonesia—			
Batavia........... Samarang......... Soerabaya......... Cheribon..........	April 6	*Silverwalnut*	Dingwall Cotts
	April 10	*Höegh Merchant*	Dingwall Cotts
Italy—			
Genoa............. Leghorn........... Naples............. Venice.............	March 23	*Tritone*	Empire Shipping
Japan—			
Yokohama.........	March 4-5	*India Mail*	Canadian Blue Star
Malaya—			
Penang............ Port Swettenham..	March 18	*Silverash*	Dingwall Cotts

Departures from Vancouver—*Concluded*

Destination	Loading Date	Vessel	Operator or Agent
Netherlands—			
Rotterdam / Amsterdam	March 28	*Vire*	Empire Shipping
New Caledonia—			
Noumea	March 3	*Thor I*	Empire Shipping
New Hebrides—			
Port Vila	March 3	*Thor I*	Empire Shipping
New Zealand—			
Auckland	March 18	*Aorangi*	Canadian Australasian
Persian Gulf	April 10	*Höegh Merchant*	Dingwall Cotts
Peru—			
Callao	March 1	*Falkanger*	Empire Shipping
Mollendo	April 4	*Ravnanger*	Empire Shipping
Philippines—			
Manila / Iloilo / Cebu	March 4–5	*India Mail*	Canadian Blue Star
Manila	April 6	*Silverwalnut*	Dingwall Cotts
Iloilo	April 10	*Höegh Merchant*	Dingwall Cotts
Manila	March 18	*Silverash*	Dingwall Cotts
Cebu	March 26–27	*Vingnes*	Empire Shipping
Samoa—			
Apia	March 3	*Thor I*	Empire Shipping
Singapore	March 18	*Silverash*	Dingwall Cotts
Society Islands—			
Papeete	March 3	*Thor I*	Empire Shipping
Sweden—			
Stockholm	March 28	*Paraguay* (r)	Gardner Johnson
Gothenburg	April 6–9	*Golden Gate* (r)	Gardner Johnson
Trieste	March 23	*Tritone*	Empire Shipping
United Kingdom—			
Hull	Feb. 23–Mar. 7	*Lake Winnipeg*	Anglo Canadian
London	March 28	*Paraguay* (r)	Gardner Johnson
London	April 6–9	*Golden Gate* (r)	Gardner Johnson
Manchester	Feb. 15–Mar. 2	*Lake Chilliwack*	Empire Shipping
Manchester	March 9	*English Prince*	Furness Withy
Unstated Ports	March 10–15	*Lake Babine*	Empire Shipping
	Mar. 25–Apr. 10	*Lake Chilco*	Anglo Canadian
Uruguay—			
Montevideo	March 1	*Falkanger*	Empire Shipping
Montevideo	April 4	*Ravnanger*	Empire Shipping
Venezuela—			
Puerto Cabello / La Guaira / Maracaibo	March 13	*Glimmaren*	Empire Shipping
	March 27	*Don Anselmo*	Empire Shipping

Canadian Firms Invited to Participate in Prague Trade Fair

Canadian manufacturers and producers are invited by the management of the Prague International Trade Fair to participate in the Spring Prague Fair to be held from March 13 to 20, 1949. Full information may be obtained from Dr. Miroslav Mareš, Commercial Attaché, Czechoslovak Legation, 171 Clemow Avenue, Ottawa.

Foreign Trade Service Abroad

Cable address:—Canadian, unless otherwise shown.
Note.—Bentley's Second Phrase Code is used by Canadian Trade Commissioners.

Argentina

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

Territory includes Uruguay and Paraguay.

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.

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 Metropòle, Avenida Presidente Wilson 165. Address for letters: Caixa Postal 2164.

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

Chile

Santiago—E. H. MAGUIRE, 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, 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—A. W. EVANS 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 Aden, Anglo-Egyptian Sudan, Cyprus, Ethiopia, Iran, Iraq, Lebanon, Palestine, Saudi Arabia, Syria and Transjordan.

France

Paris—J. P. MANION, Commercial Secretary, Canadian Embassy. Address for letters: 3 rue Scribe.

Territory includes Algeria, French Morocco and Tunisia.

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

Territory includes Belgium, Denmark, France and the Netherlands.

Germany

Frankfurt—B. J. BACHAND, Canadian Economic Representative, Canadian Consulate, Economic Section, 145 Fuerstenbergerstrasse, Frankfurt am Main, A.P.O. 757, U.S. Army.

Cable address, Canadian Frankfurt/Main.

Greece

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

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 11.

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.

Italy

Rome—R. G. C. SMITH, Commercial Secretary, Canadian Embassy, Via Saverio Mercadante 15-17.
Territory includes Malta, Yugoslavia and Libya.

Jamaica

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

Mexico

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

Netherlands

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

Newfoundland

St. John's—R. CAMPBELL SMITH, Commercial Secretary, Office of the High Commissioner for Canada, Water Street.

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.

Wellington—Dr. W. C. HOPPER, Commercial Secretary (Agricultural Specialist), Office of the High Commissioner for Canada, Post Office Box 1660.

Norway

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

Pakistan

Karachi—R. K. THOMSON, 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, Indonesia, North Borneo, Brunei, Sarawak and Siam.

South Africa

Johannesburg—S. V. ALLEN, Commercial Secretary for Canada, Mutual Building, 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.

Foreign Trade Service Abroad—*Concluded*

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—T. G. Major, Canadian Government Trade Commissioner, Colonial Life Insurance Building. Address for letters: Post Office Box 125.

Territory includes Barbados, Windward and Leeward Islands, British Guiana, Dutch Guiana, French Guiana, and the French West Indies.

Turkey

Istanbul—G. F. G. Hughes, Acting Commercial Secretary for Canada, 20 Yeni Carsi Caddesi, Beyoglu.

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—J. L. Mutter, Canadian Government Trade Commissioner, 200 St. Vincent Street.

Territory covers Scotland and Iceland.

Cable address, Cantracom.

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

Territory covers Northern Ireland.

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.

Boston—T. F. M. Newton, Consul of Canada, 532 Little Building, 80 Boylston Street, Boston 16.

Detroit—J. J. Hurley, Consul of Canada, Canadian Consulate, 1035 Penobscot Building, Detroit 26, Michigan.

Chicago—Edmond Turcotte, Consul-General of 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.

San Francisco—H. A. Scott, Consul-General of Canada, 3rd floor, Kohl Building, 400 Montgomery Street, San Francisco.

Venezuela

Caracas—J. A. Stiles, Acting Canadian Government Trade Commissioner. Address for letters: Canadian Consulate General, 8° Piso, Edificio America, Esq. Veroes.

Territory includes Netherlands Antilles.

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 Feb. 7	Nominal Quotations Feb. 14
Argentina	Peso	Off.	·2977	·2977
		Free	·2085	·2085
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	....	·5128	·5128
Cuba	Peso	....	1·0000	1·0000
Czechoslovakia	Koruna	....	·0200	·0200
Denmark	Krone	....	·2083	·2083
Ecuador	Sucre	....	·0740	·0740
Egypt	Pound	....	4·1330	4·1330
Fiji	Pound	....	3·6306	3·6306
Finland	Markka	....	·0073	·0073
France and French North Africa	Franc	Off.	·0038	·0038
		Free	·0031	·0031
French Empire—African	Franc	. .	·0076	·0076
French Pacific Possessions	Franc	....	·0202	·0202
Haiti	Gourde	....	·2000	·2000
Hong Kong	Dollar	....	·2518	·2518
Iceland	Krona	. .	·1541	·1541
India	Rupee	....	·3022	·3022
Indonesia	Florin	....	·3769	·3769
Iraq	Dinar	. .	4·0300	4·0300
Ireland	Pound	...	4·0300	4·0300
Italy	Lira	....	·0017	·0017
Jamaica	Pound	...	4·0300	4·0300
Malaya	Dollar	....	·4701	·4701
Mexico	Peso	. .	·1452	·1451
Netherlands	Florin	. .	·3769	·3769
Netherlands Antilles	Florin	. .	·5302	·5302
New Zealand	Pound	. .	4·0300	4·0300
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	Lira	...	·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	·5618	·5618
Venezuela	Bolivar	....	·2985	·2985