

FOREIGN TRADE

OTTAWA, MAY 14, 1949

Published Weekly by
FOREIGN TRADE SERVICE
Department of Trade and Commerce

In This Issue

Canada—British Board of Trade President Visits Canada	1006
Guatemala—Confidence Restored as Labour Dispute Settled . .	1008
Germany—Regulations Issued by Export Import Agency	1011
Cuba—Record Sugar Crop Sold at Satisfactory Prices	1013
Iceland—Dollar Shortage Restricts Imports from Canada	1017
Ireland—Transport System Will be Reorganized	1021
Australia—Shortages of Material Affect Industrial Expansion . .	1024
Latin America—Important Canadian Supply Source and Market	1030
East Bengal—Principal Producer of High Quality Jute Fibre	1038
Canada—Great Britain Plans Additional Purchases Here	1043
Canada—Exports, by Commodities (January-March, 1949)	1044

Regular Features

Foreign Exchange Quotations	1060
Foreign Trade Service Abroad	1057
Trade Commissioners on Tour	1046
Trade and Tariff Regulations	1047
Transportation—Section	1048
Departures from Montreal	1048
Departures from Quebec	1052
Departures from Halifax	1053
Departures from Vancouver	1053
Services to Newfoundland	1056

COVER SUBJECT—Timber, from the hinterland of Sweden, being driven down one of the swollen rivers to sawmills on the coast, in much the same way as logs from Canadian forests travel down the numerous streams in all parts of the country, later to be converted into planks, pulp and paper. The timber industry of Sweden is of particular importance in Norrland, in the northern part of the country. The pulp and paper industry accounts for approximately 45 per cent of Sweden's total exports.

Price 10 cents

British Board of Trade President Studying Conditions in Canada

Right Hon. Harold Wilson to make tour of this country before attending inaugural ceremonies at Canadian International Trade Fair—Discussed factors affecting Anglo-Canadian commercial relations prior to leaving United Kingdom.

TRADER promotion is the purpose of the visit to Canada of the Right Hon. James Harold Wilson, President of the British Board of Trade, who will be in Ottawa today. After visiting various parts of this country, he will attend inaugural ceremonies at the Canadian International Trade Fair on May 30, in Toronto.

Speaking at a luncheon of the Canadian Chamber of Commerce of Great Britain, held on May 4, in London, Mr. Wilson pointed out that every effort would be made to remove the misunderstanding in Canada concerning the trade policy of the United Kingdom Government. There was no easy solution to this problem of trade between Canada and Great Britain, he declared. "All of us recognize its vital importance, not only for the economies of our two countries, but for its bearing on Anglo-Canadian friendship, and for the very cause of peace itself. An increase in exports to Canada is the only solution. There are those who feel that there is some inherent error in our trading policy which, if put right, would solve the Canadian trade problem. There is a great disposition, which makes itself felt both in Great Britain and Canada, to suggest that if we were to drop our present policy of bilateral trade agreements with European nations and to concentrate instead on the Canadian market, all our difficulties would disappear.

"Resentment is expressed, as it is put, to the export of steel to Scandinavia and Eastern Europe in return for grain, when if this steel were diverted to Canada—whose need for these things we only too fully realize and are doing our best to meet—would enable us to obtain all our requirements from there. But, I cannot too strongly stress that we have not embarked on any system of barter deals of steel against timber, machinery against grain, or tinsplate against salmon. In every case, sales of scarce goods, steel to Sweden or Finland and so on, represent only a small proportion of our total imports of timber and other requirements from those areas. The main weight of goods we have received from them is paid for, not by steel or other commodities marketable in Canada, but by manufactured goods which on the whole we have so far not been able to sell in Canada. If the whole of our steel shipments to timber producing areas of Europe were diverted to Canada, it would not pay for more than a small proportion of our timber needs or what Canada would like to sell. So it is with tinsplate. Criticism has also been made of the contract, signed some time ago with the Soviet Union, for canned salmon and crab. It has been suggested that this tinsplate was sent to Russia to pay for fish which was put inside it. It was not. It was used simply to can fish for which we were paying in sterling as a result of Russia's purchase of sterling area products and to a small extent of engineering goods. But none of these engineering goods was diverted from the Canadian market. In fact, our total exports to the whole of Eastern Europe in 1948 totalled only \$160,000,000, as compared with nearly double that figure to Canada. And, only a very small proportion of what went to Eastern Europe could have been bought by Canada, even if we had cut off all trade with the East.



Great Britain—Houses of Parliament, Westminster.

Courtesy Travel Association.

Bilateral Trade Essential to European Recovery

"Bilateral trade is an essential part of the recovery of Europe. There are many goods which countries will only agree to sell us, goods very urgently needed by them at home, over a period of trading arrangements under which they are confident we for our part will make available certain scarce goods. The British Government does not regard bilateral trading as a permanent instrument of our policy. Our trade is too diverse and variegated to be capable of planning on bilateral lines. Like our Canadian friends, we all look forward to the establishment, as quickly as possible, of a world trading system in which multilateral trade and convertible currency can play their full part. But, the world is sadly out of balance, and much needs to be done before we can reach the goal to which we have all set ourselves."

In conclusion, Mr. Wilson said: "I hope that, throughout Canada as through Britain, there will grow up a realization that our two economies are complementary, and that if they are met together each can contribute equally to the rebuilding of this war-shattered world, to industrial development, and trading advantage in both countries, and to the raising of the standard of life of our peoples to the level we all desire to see."

Government Considers Trading Position Serious

Port-of-Spain, March 23, 1949.—(FTS)—The Department of Agriculture in Barbados estimates that the 1949 sugar yield, including fancy molasses, will reach 150,000 tons as compared with 78,226 tons last year. The season has been exceptionally good with none of the troubles with the cane juice which were experienced in 1948. As a result, the quality of the sugar is excellent. Up to the end of February, 35,016 tons of sugar and 21,000 puncheons of fancy molasses had been made, with grinding operations likely to continue until at least the end of June.

Confidence in Guatemala Restored By Settlement of Labour Dispute

United Fruit Company, Government and union representatives reach agreement to last twelve months—Unfavourable trade balance recorded in past year—Coffee crop satisfactory and prices highest on record—Ban on importation of flour, since removed, affected quality of bread.

By C. Blair Birkett, Canadian Government Trade Commissioner

(Editor's Note—Mr. Birkett is at present on tour in Canada, and will discuss trade conditions in Costa Rica, El Salvador, Guatemala, Honduras and Nicaragua with interested firms.)

GUATEMALA CITY, March 23, 1949.—Settlement of a dispute between the United Fruit Company and the Government of Guatemala has restored a measure of confidence in the economy of this country, though an unfavourable balance of trade was recorded in 1948 for the second year in succession. Wages and conditions of work produced a problem for the United Fruit Company last November that developed serious proportions towards the end of February. After several attempts to force this company to submit to arbitration, common sense prevailed, and an amicable settlement was reached between the company, labour leaders and the Ministry of Economy. The agreement reveals no substantial concessions to the labour unions, but it will be reviewed after twelve months. The past year also produced an unbalanced budget and an unfavourable international balance of payments.

On the credit side, a coffee crop of nearly 1,000,000 bags of a hundred pounds is at least as good as those of previous years. At the prevailing satisfactory prices, this production will help to offset the serious decline in the harvest and shipment of bananas in December, January and February. Coffee prices reached a new high of \$32.50 per quintal, f.o.b. Puerto Barrios, in October and November. At present, the price is \$31.00, which is regarded as firm. About 300,000 bags remain to be sold, most of this consisting of government-owned supplies on its plantations. Owing to financial difficulties, the Department of National and Intervened Farms, which controls the nation's coffee interests, is seeking funds.

Business conditions in Guatemala were generally brisk during the year, culminating in a satisfactory Christmas trade. Since January, however, merchants and importers indicate a falling off from the busy scene a year ago, with noticeably stronger competition in all lines of merchandise. There is also a "wait and see" attitude in evidence with respect to possible price reductions in the United States.

Political Scene Somewhat Confused

The political scene, which is somewhat confused, should be more clearly defined later this year. Fourteen Anti-Arevalists were elected to Congress last December, when a member of an opposition party was elected mayor of Guatemala City for the first time in many years. While this indicates a certain trend, there has been no rumour of any political disturbance since last November. An unfavourable balance of trade, coming at a time of high coffee and banana prices, together with a growing deficit in the Treasury, present problems that will have to be met with energy and skill by the present administration.



Guatemala City, capital of Guatemala, in which settlement of labour dispute with United Fruit Company has restored confidence in economy of country.

Guatemalan exports during the past year were valued at \$50,165,000, and imports at \$68,350,000, which resulted in the creation of an unfavourable trade balance of \$18,185,000. During the previous year, imports exceeded exports by slightly more than \$5,000,000. It would appear that a turning-point has been reached, therefore, as Guatemala had favourable trade balances of from \$2,000,000 to over \$7,000,000 during the war years. However, an appreciable quantity of imports are paid for from funds held in other countries. The large unfavourable balance of last year does not represent such a heavy drain on foreign exchange, therefore, as it would appear.

The Guatemalan Government takes a serious view of its present trading position, and there has been much discussion in Congress concerning possible solutions. It has been suggested that imports should be curtailed from those countries which sell much more to Guatemala than they buy here, even if this involves amending existing trade agreements. Trade with the United States has received much consideration.

The principal sources of supply for Guatemala are: United States, \$52,107,000; Mexico, \$2,865,000; Great Britain, \$1,875,000; Curaçao, \$1,636,000; El Salvador, \$1,562,000; Canada, \$1,470,000; Aruba, \$1,289,000; Switzerland, \$662,000; Belgium, \$581,000; and Peru, \$576,000.

The United States purchased goods valued at \$44,617,000 from Guatemala last year, that country being the principal market. Others were: Canada, \$1,970,000; Great Britain, \$704,000; Belgium, \$654,000; Venezuela, \$409,000; and Italy, \$363,000.

In total trade with Canada, Guatemala achieved a balance in her favour of \$499,969, according to Guatemalan statistics. Canadian statistics show this balance to be much larger. This is due to the fact that the United Fruit Company, in its inter-company trading between Guatemala and the United States, only places a small nominal value on banana exports. On entry into Canada, they are recorded at their proper value which is some 700 per cent higher than that recorded in the Guatemala export returns.

Canada's principal exports to Guatemala in order of importance were flour, newsprint, whisky, machinery (mainly sewing-machines), leather, malt, rubber manufactures, copper and manufactures, paraffin, electrical apparatus, canned fish, and fertilizers. Purchases by Canada were largely confined to bananas and coffee. Other produce, such as chicle, textiles, and timber, accounted for a limited value.

Importation of Flour Prohibited

Importation of flour was prohibited in January last. (This restriction has since been removed.) This was done in response to a plea from the millers of local wheat, who claimed that the Bakers' Union, which early last year was formed to control imports of flour, had not lived up to its contract which requires that locally produced flour be fully consumed along with the imported product. As the result of the prohibition the quality of bread has suffered, and there has been no price reduction, one of the main objectives of the Union.

The Organic Law of the Production Development Institute was passed in 1948. The institute has the following as its objects: Fostering of agricultural and livestock industries; introduction of new and remunerative crops for home consumption and for export; assistance to the setting up, expansion and rationalization of national industries using local raw materials; and the supporting of economic activities directly and indirectly supplying a high level of well-remunerated employment.

The institute is a government organization with an authorized initial capital of \$6,500,000, made up of a cash advance of \$1,500,000 and \$5,000,000 to be realized from the sale of government securities. The directive council is made up of several ministers of departments, labour executives, and businessmen.

Another law of importance passed during the year was the Expropriation Law, which provides that any type of property, real or otherwise, can be expropriated by the state for reasons of public utility, necessity, or for social interest. Compensation is not to exceed an amount 30 per cent more than the declared fiscal value of the property, a value usually well below the true value. The existence of this law has been the subject of much comment regarding the government's part in the dispute between the United Fruit Company and the labour unions. It has been much criticized by local businessmen and foreign interests.

Association of Essential Oil Producers Formed

In May an association of essential oil producers was formed, with government approval, to bring about the orderly production and marketing of citronella and lemon-grass oils. Great hopes were held for a stable price and increased exports, but later in the year the controlling office ran into difficulties. Blight affected crops to a certain extent and the highest price that materialized on the export market was about \$1.05 per pound. The required level for efficient operation of the industry is regarded as \$1.50.

Three American oil companies are at present awaiting the decision of the Guatemalan Government regarding their contracts before commencing operations in the search for oil in the northern territories. Present requirements of the government, such as a 16½ per cent royalty on all production from the discoveries of oil, are considered obstacles to the attraction of the necessary capital. A debate is pending in Congress on the adequate protection and exploitation rights being sought by the interested companies.

Cost of Living Continues to Rise

The latest available figures on costs of living show that the trend is still upward and at an increased rate. Price increases on staple commodities of popular diet, such as corn, beans, and rice, have been of the gravest concern to the government, resulting in removal of duties on imports. Increases have also been observed on all foodstuffs, rents, and other necessities. Over 1948, price indices are reported to have risen 14 to 18 points.

Gold and foreign exchange holdings as of December 31, 1948, were approximately \$46,650,000, which marked a reduction of over \$4,000,000 from the figure in mid-1947. By the end of February, the supply had improved to \$47,168,000. During the year, Congress approved a supplementary budget of \$1,880,000, bringing the 1948-49 figures to \$46,529,195. At December 31, the account was showing a deficit of about \$10,800,000, which is to be met from previous surpluses. The budget estimates for 1949-50 recently sent to Congress total 41,496,265 quetzals, which includes ordinary and extraordinary expenditures.

Export Import Agency Issues Regulations For Recovery Shipments to Germany

Normal procedure set forth by the Import Advisory Committee should be followed for purchases financed through Economic Co-operation Administration, in Washington.

By B. J. Bachand, Canadian Economic Representative

(Editor's Note—Additional information concerning the following procedure was published in the March 26, 1949, issue of *Foreign Trade*. Inquiries on this subject should be directed to the Canadian Trade Commissioner Service, Department of Trade and Commerce, Ottawa.)

FRANKFURT, April 20, 1949.—Regulations governing the purchase of commodities for shipment to Germany, and financed through the Economic Co-operation Administration, in Washington, have been issued by the Joint Export Import Agency, which has indicated that the normal procedure set forth by the Import Advisory Committee should be followed.

On receipt of advice from Washington that a procurement authorization has been issued, the German economic authorities will prepare detailed specifications, which will be submitted in due course to IAC. In the event that procurement is to be made by JEIA, the procedure for central purchases will be followed.

In the event that procurement is made on a decentralized basis, all pertinent details of the procurement authorization, with purchase specifications, will be published in the *Oeffentlicher Anzeiger* or included in the funds allocation certificates.

Marking—The contract must require that all commodities furnished thereunder be marked with the official ECA emblem. If it is not practicable

to mark the commodities themselves in such manner, the contract will provide that the containers in which the commodities are packaged will be so marked.

Transmittal of shipping documents to ECA—The contract must require that at time of loading the shipper will airmail one copy of the ocean or charter party bill of lading or airway bill to ECA, Washington 25, D.C., with a copy to the Controller, ECA Mission % U.S. POLAD, APO 757, % Postmaster, N.Y.

Documentation—The contract must provide for all ECA documentation. The following minimum documentation is required for the cost of any commodity, including ocean freight in CIF transactions:

- (1) Certificate of the seller that two copies of contract and any amendments thereto have been furnished to ECA, Washington 25, D.C., through Department of the Army, Office of the Undersecretary, ERP Group.
- (2) Supplier's certificate in the appropriate form required by ECA regulations.
- (3) Supplier's certificate as to country of origin of the commodity.
- (4) One copy of supplier's detailed invoice showing quantity, description, price and basis of delivery of the commodities or services, and either marked "Paid" by the supplier, or endorsed by an officer of a banking institution, indicating that payment has been made in the amount shown on the invoice.
- (5) One copy of ocean or charter party bill of lading or airway bill.
- (6) Such additional documentation as may be required in the procurement authorization.

The following minimum documentation is required for the cost of ocean transportation under the terms of ocean transportation procurement authorizations. (Applicable to ECA financed cargoes, to the extent that payment is made in dollars in accordance with the custom of the trade, and to non-ECA financed cargoes on United States flag vessels):

- (1) For bulk cargoes shipped under charter party, one copy of charter party. In the case of tanker shipments only, if shipment is not made under charter party, one copy of the contract or affreightment.
- (2) One copy of ocean or charter party bill of lading or airway bill. In the case of tanker shipments only, if the bill of lading is not immediately available, one copy of cablegram from ship's agent showing cargo figures, and a certification by the supplier of the ocean transportation that a copy of the bill of lading will be submitted to ECA Washington 25, D.C., within 90 days from date of loading.
- (3) One copy of the detailed invoice of the supplier indicating the vessel, flag and the dollar cost of ocean freight and related transportation charges, either marked "Paid" by the supplier or endorsed by an officer of a banking institution, indicating that payment has been made in the amount shown on the invoice. If the bill of lading complies with the requirements of this sub-paragraph, no invoice is required. Claims for cost of tanker demurrage may be submitted separately and must be supported by the documentation required by this paragraph.
- (4) Supplier's certificate, in the form required by ECA regulation.

Cuba Sold Record Sugar Crop at Satisfactory Prices Last Year

Zenith in postwar prosperity reached during 1948—Large unexpected purchase by the United States Commodity Credit Corporation resulted in smallest carry-over ever known—Business generally had a good year—Future viewed with cautious optimism.

By A. W. Evans, Commercial Secretary for Canada

HAVANA, March 18, 1949.—The year 1948 marked the zenith of postwar prosperity in Cuba, as the largest sugar crop ever recorded was marketed at satisfactory prices. The unexpected purchase by the United States Commodity Credit Corporation of over a million long tons of the crop resulted in one of the smallest carry-overs ever known. In consequence, business generally had a good year, and unemployment was at a minimum. Government revenues were buoyant, and bank clearings and volume of money in circulation achieved new highs.

As wages chased prices, the cost of living continued to rise, but tapered off at the end of the year. Supplies of all types of goods flooded into one of the few remaining free markets, resulting in the demand for many items being met, and in some cases surpassed. Although food, rent, wearing apparel and cost of services remained at peak levels, in some other lines prices have been slightly reduced, and a definite "buyers' market" is beginning to appear.

Looking to the future, grave problems are apparent. World sugar supplies are increasing while prices are showing a downward trend. Although Cuba will have a substantially smaller crop than last year, it does not appear that she will market as much sugar in the United States. There is also a strong rumour that purchases by the United States Commodity Credit Corporation will account for a much smaller amount than last year.

The price of molasses, which has been bringing a substantial income, has fallen from a high in 1948 of about 20 cents per gallon to the present price of about four cents.

Labour problems are far from solved, and unemployment is increasing as domestic manufacturers, particularly of textiles, begin again to feel the effect of foreign competition.

Sugar Crop Sets New Records

The 1948 sugar crop established a new record of 5,876,761 long tons, compared with the previous one set in 1947 of 5,667,238 tons. The entire crop was sold at good prices, although somewhat below those of the previous year. The American quota, after final adjustments had been made, worked out at 2,549,700 tons, or 43 per cent of the total crop. Sales to other countries accounted for another third, namely, some 1,886,061 tons.

The United States Commodity Credit Corporation purchased 1,275,000 tons for army and relief purposes, and in addition contracted for 150,000 tons of 1948 or 1949 crop sugar to be delivered in January of this year.

Output of black-strap molasses was 332,335,031 gallons, exceeding the previous year's production by over one-third. The greater part of this was marketed at satisfactory prices.



Cuba—Sugar cane being loaded on railway cars for transportation to the mills. The largest sugar crop ever recorded was marketed this year at satisfactory prices, and the sale of over a million long tons to the United States Commodity Credit Corporation resulted in one of the smallest carry-overs.

The crop now being harvested is estimated at five million long tons, which figure may be reduced as the effects of hurricane damage in September and October are finally known.

Controversy between the mill owners and the cane growers, who had demanded a greater share of the return from sugar production, delayed the start on the present crop, and this will also have a deleterious effect as will further labour troubles which have occurred.

Tobacco Industry Adversely Affected by Loss of Markets

The tobacco industry, second in importance in Cuba, continues to suffer adversely from the loss of many of its markets, due to import restrictions, and its operations have further declined.

Canadian exports to Cuba showed a sharp rise from \$7,501,550 in 1947 to \$10,986,791 in 1948, an increase of 46·5 per cent. Chiefly responsible was an increase in available supplies, although the establishment of direct shipping services and the lower tariffs granted at Geneva were all of assistance. However, with supplies more freely available from the United States, the substantial margin of preference which its products receive will become more and more a handicap for Canadian exporters. Although the Geneva Agreements effected a measurable reduction in this preference, in most lines it is still large enough to afford an ample margin of protection. In addition, at the present time, a 20 per cent surcharge on the duties is in force, which does not apply to the United States in most items.

Continued import restrictions imposed by many of Cuba's old customers and the consequent loss of markets caused reduced quotas to be set for the tobacco crop. This resulted in yield falling from 556,249 bales in 1947 to 317,065 bales last year. No official restrictions have been imposed for 1949, but growers are reported to be reducing their plantings.

October's heavy rains delayed seeding, and this will also affect the size of the crop. The domestic demand continues at a high level, but exports dropped slightly. The figure for 1948 was \$32,669,314, which was some \$2,019,636 less than for 1947.

Coffee Yield Below that of Last Year

Coffee production was 718,567 quintals, 50,000 quintals below the previous crop. No imports were necessary to satisfy local consumption, and prices remained at satisfactory levels.

The new crop is estimated to be in the neighbourhood of 700,000 quintals which, with stocks on hand, should meet domestic requirements in the present year. From latest available figures, the above estimate would appear to be a trifle high.

Though a record rice crop, estimated at 85 to 90 million pounds, is being harvested, substantial imports will still be necessary. The above figure is three times the average prewar crop, and rice acreage continues to be extended. Pasture conditions have been good, and, although meat supplies to the Havana market were poor last summer due to low official prices for cattle, adjustment of prices in September has remedied this situation.

The summer corn crop was large, but the bean crop poor, with resultant high prices.

Five million boxes of pineapple were harvested, and exports for the first eight months of the year almost equalled those for the entire twelve months of 1947.

Heavy rains in September and October damaged the winter vegetable crop which was late in maturing.

Balance of Trade Favourable

Available figures show the value of exports again exceeding those of imports, and, when final totals are published, they will indicate a substantial export surplus on merchandise account.

Imports for the first ten months of 1948 were valued at \$441,670,286, compared with \$394,817,708 for 1947. The increase was due mainly to enhanced imports from the United States, which accounted for \$352,306,796 of the record figure.

Exports for 1948 totalled \$709,872,461, slightly below the all-time high of the previous year of \$746,592,325. The drop in value of exports for 1948 was mainly due to the lower average price received for the sugar crop. The above figures compare with the average yearly exports for the period 1935-39 of \$151,859,000.

Shipping services continued to improve during the year, and assisted in swelling the total import value. Of particular interest to the Canadian exporter was the establishment of direct shipping services between Canadian Atlantic ports and Montreal and Cuba.

Tourist Trade Did Not Meet Expectations

While the tourist trade last year did not live up to expectations, it was still substantial. Although shipping and airline services are now excellent, the high cost of living here has been a discouraging factor. An estimated 160,000 tourists visited Cuba in 1948, or about three thousand more than 1947. However, estimated expenditures dropped slightly to \$36,272,450 from \$36,793,650 in the previous year. From various newspaper reports it would appear that the tourist trade this winter is suffering a minor slump.

Nearly 77,500 Cubans went abroad during 1948, and, although their expenditures are estimated as being higher than those of visitors to Cuba, due to greater transportation expenses, the net gain from the tourist trade by Cuba must still have been substantial. This gain could be further increased as Cuba's tourist trade is, undoubtedly, capable of considerable expansion.

Revenues for the past year continued to be buoyant, although somewhat lower than the previous year, standing at \$216,597,948 compared with \$244,462,071 for 1947.

Spending by government has been cut to meet declining revenues, although it would appear that a deficit is in sight for the present fiscal year with expenditures calculated at \$222,999,997. Revenues for the month of January this year showed a decided drop, being \$14,937,076 compared with \$18,056,086 for January, 1948.

National Bank of Cuba Established

Of major interest in the field of banking and finance has been the passage of a law dealing with the establishment of a central bank to be named "The National Bank of Cuba". This bank is expected to commence operations in September of this year.

Bank clearings for 1948 totalled \$2,540,435,798, surpassing the all-time high in 1947 of \$2,321,856,652. This figure is four times the prewar total of \$662,876,530, and is an excellent indication of present prosperity and the high level of business transactions.

Money in circulation at the end of 1948 also represented another record high of \$585,657,536, over one hundred million dollars above that for December, 1947, and almost ten times the equivalent for December, 1939.

High cost of food and other products on world markets, combined with shortages, pushed the cost of living to a new high last year. This curve, however, flattened out slightly at the beginning of 1949, but there is still little sign of any definite recession of prices. Further wage increases were given, which helped to maintain demand at record levels.

Although public works have been severely curtailed by shortages of funds, private building continues to boom, as materials have become more readily available. Building permits issued in Havana Province totalled \$35,000,000 last year compared with \$21,133,483 in 1947, with the figure for January, 1949, slightly over January, 1948.

Future Prospects Clouded

The prospect of lower prices and lower output of sugar is already having an effect on business conditions, although it appears to be generally conceded that 1949 will be another prosperous year. While the value of sales has dropped and inventories are increasing, business remains at high levels.

Lack of hard currency will affect sugar sales to countries other than the United States, and world production is steadily increasing. The latest blow to sugar prospects has been the fall in the price of molasses, which will cause a loss in income of over \$50,000,000 to Cuban sugar producers this year.

Continued unsettled labour conditions tend to discourage the establishment of new industries, although a rayon yarn factory has just commenced operations, while plans are well advanced for the construction of a flour mill and a factory for the production of a fibre from a special type of hibiscus plant. There is no lack of local capital which would immediately become available for investment under reasonably favourable conditions.

Generally speaking, the future is viewed by local businessmen with cautious optimism, and there is a growing tendency to restrict purchases to such supplies as are necessary for immediate requirements. Cuba must be regarded as a highly competitive market, and all quotations should take this factor into account.

Acute Dollar Shortage in Iceland Restricts Imports from Canada

Purchases from the Dominion in 1948 comprise essentials not obtainable elsewhere—United Kingdom was chief destination of exports and principal source of imports—Important trade agreement concluded with Britain—ECA assistance authorized.

By J. L. Mutter, Canadian Government Trade Commissioner in Glasgow

(One krona equals \$0.1541 Canadian)

GLASGOW, April 8, 1949.—Iceland suffered from an acute shortage of dollars during the past year, and imports from countries requiring payment in that currency were rigidly restricted to essentials not obtainable from other sources. Consequently, imports from Canada were valued at only \$1,845,027 as compared with \$2,485,464 in the previous year. The principal items purchased from Canada in 1948 were: Wheat flour, \$725,284; manufactured fertilizers, \$421,088; oatmeal and rolled oats, \$164,160.

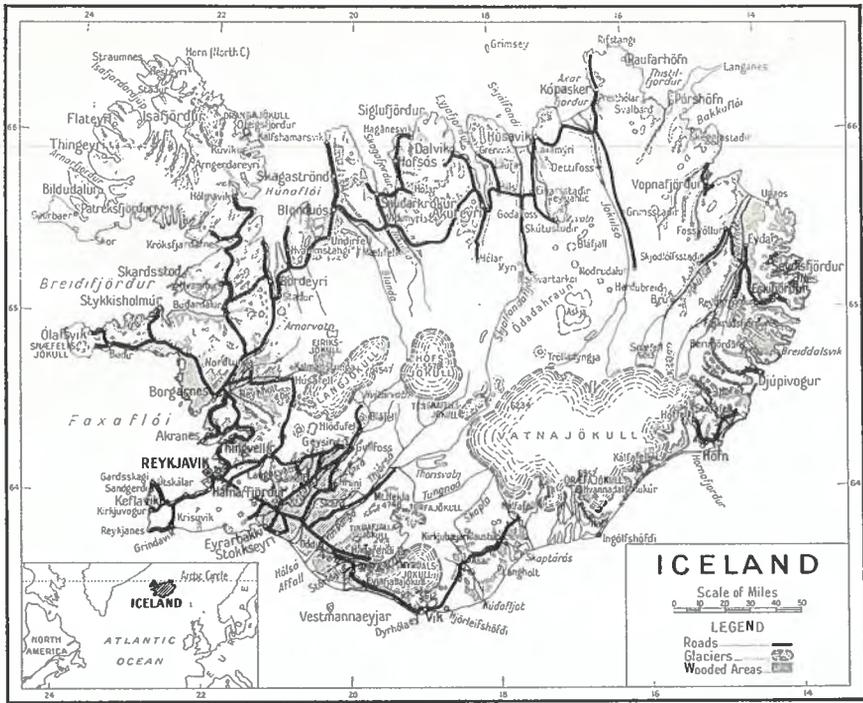
Exports from Iceland to Canada were valued at only \$75,762 last year as compared with \$29,889 in 1947. Raw calf-skins and kips accounted for \$23,829 worth of exports in 1947, but no less than \$65,767 of the 1948 total represented Canadian goods returned to the suppliers. This fact underlines Iceland's grave dollar position and indicates the severity with which the import and exchange controls are being administered. Canadian exporters are warned not to execute orders from Iceland unless their customers can submit firm evidence that they possess both import and exchange permits.

Imports Exceeded Exports

Imports during the past year were valued at kr. 456,719,000 and exports at kr. 395,678,000, which resulted in the creation of an unfavourable trade balance of kr. 61,039,000. This was a material improvement over conditions in 1947, however, when the adverse trade balance was kr. 228,596,000.

Icelandic Exports, by Principal Commodities

	1948		1947	
	Quantity 100 Kilos	Value (f.o.b.) 1,000 Kr.	Quantity 100 Kilos	Value (f.o.b.) 1,000 Kr.
Fresh fish (on ice and frozen)	1,473,658	154,356	866,269	111,758
Herring oil	283,356	74,313	205,267	51,799
Herring and fish meal	391,847	40,671	166,194	16,423
Cod liver oil	80,357	33,666	54,066	22,864
Salted fish (uncured)	147,517	26,681	266,224	46,364
Herring (cured)	109,825	22,794	66,043	13,221
Sheep skins (green salted)	Hundreds 7,462	16,085	Hundreds 2,664	4,901



Map by Canadian Geographical Society

It will be noted that, with the exception of salted fish (uncured), 1948 exports of all fish and fish products were greater, both in quantity and value, than those for the previous year. This is noteworthy in view of the poor summer herring yield and the almost total failure of the winter herring fishing.

Icelandic Exports, by Principal Destinations

	1948	1947
	1,000 Kr.	1,000 Kr.
Total	395,678	290,482
Great Britain	118,748	107,364
Germany	67,574	5,284
Netherlands	34,694	6,067
Czechoslovakia	29,751	14,161
United States	26,349	14,984
Finland	17,630	3,778
France	16,836	12,216
Denmark	15,662	5,299
Sweden	14,808	8,956
Italy	13,004	24,104
Greece	11,914	13,208
Poland	8,924	4,598
Russia	6,142	54,245

Icelandic Imports, by Principal Countries

	1948	1947
	1,000 Kr.	1,000 Kr.
Total	456,719	579,078
Great Britain	135,891	190,350
United States	85,676	121,279
Denmark	40,829	30,777
Venezuela	26,724	12,307
Netherlands	25,055	7,282
Czechoslovakia	22,905	12,856
Sweden	22,143	34,732
Canada	19,746	18,769
Poland	13,937	13,986
Italy	12,925	14,263

Hereunder are shown the quantities and values of the fourteen leading import items, the value of the merchandise contributed by the principal suppliers in 1948:

	1948			1947		
	100 Kilos	1,000 Kr.		1,000 Kr.	100 Kilos	1,000 Kr.
Total (all imports)		456,719				579,078
Ships	223,545	65,607	United Kingdom Denmark United States	35,427 13,126 9,424	188,222	88,796
Machinery and appliances other than electric	34,076	32,369	United Kingdom Sweden United States	9,447 5,197 10,220	45,650	38,392
Fuel oil	1,247,159	28,197	Venezuela	26,549	986,506	19,519
Electrical machinery and appliances	24,858	25,543	United Kingdom United States	10,607 7,124	27,661	26,024
Wood, wood products and cork	231,654	21,939	Finland Sweden	10,841 4,172	337,484	32,683
Hardware	54,574	21,160	United Kingdom United States Czechoslovakia	9,114 3,501 2,763	71,818	22,663
Cereals	213,086	21,147	Canada United States	12,277 8,200	179,104	17,775
Coal and coke	1,220,339	20,619	Poland United Kingdom	14,761 6,787	1,637,505	27,142
Iron and steel	125,494	17,974	United Kingdom United States Belgium	6,672 4,235 3,720	116,482	15,484
Textile fabrics	20,622	17,432	United Kingdom United States	6,598 4,134	13,505	7,270
Vehicles and aircraft .	14,422	15,996	United States United Kingdom	12,223 2,815	64,981	47,120
Textile clothing	6,696	15,109	United Kingdom Holland	5,542 4,540	9,018	22,307
Cement	584,276	11,662	United Kingdom Denmark	5,862 5,341	636,878	11,985
Fats, oils and waxes ...	25,376	10,446	Holland United States	4,038 3,054	24,792	8,899
Total		325,200				386,059

Trade Agreements Concluded with United Kingdom

Early in 1948 a United Kingdom delegation, representing the Ministry of Food and the Board of Trade, visited Iceland to make arrangements for the supply by Iceland to Great Britain during the year of herring oil, herring meal and frozen fish, and for the delivery, by the United Kingdom to Iceland, of supplies of coal, steel and sisal. At that time the Icelandic authorities agreed to issue import licences within the limits of their sterling earnings and, furthermore, to issue import licences to permit the clearance of a substantial part of the British merchandise detained by them in customs. By the terms of this agreement, when officially announced by the Icelandic Government in June, the United Kingdom was to purchase 13,000 tons of herring oil at £97 per ton f.o.b. for the first 4,500 tons (from the production of the previous winter) and at £95 per ton for the remaining

8,500 tons from the current summer production. A price of £100 per ton was fixed on a further optional quantity up to 12,000 tons, if summer production proved sufficient and Iceland's intention to deliver was declared before the end of October. The United Kingdom also agreed to purchase 8,000 tons of frozen fillets at the Icelandic "government-guaranteed price" (basic price, \$452 for cod fillets, adjusted for other kinds of white fish) and 5,000 tons of herring meal from winter production at £35 per ton f.o.b. An option to purchase 40 per cent of Icelandic summer production of herring meal at £32 per ton was also obtained.

In December a further agreement was signed by the British and Icelandic governments covering the sale of fish to the Bizonal Area of Germany. This called for the delivery, between February and October 31, 1949, of 67,000 tons of iced fish to German ports.

In the same month a trade agreement between the Netherlands and Iceland was concluded for an exchange of goods valued at \$5,600,000 during the period ending November 30, 1949. By the terms of this arrangement, Iceland will supply the Netherlands with fish meal, cod liver oil, frozen and salted fillets, fish skins and furs. In return, Iceland will receive from the Netherlands fats and oils (edible and non-edible), coke, wearing apparel, paints, hardware and other miscellaneous items.

Economic Improvement Based on ECA Assistance

On July 16, 1948, it was announced that a loan to Iceland of \$2,300,000 through the Economic Co-operation Administration had been authorized for the purpose of assisting Iceland to finance the purchase of United States machinery, equipment, supplies and attendant services designed to increase the production and processing of fish oils and related products and their exportation. It is understood that, in terms of Iceland's participation in the long-term European Recovery Program, the country contemplates and is planning for considerable expansion of the production of fish and fish products during the next four years.

The fishing fleet (25,000 gross tons in 1948) is to be brought up to 54,000 tons during 1949 and to include eventually some forty new ocean-going steam trawlers of 175 to 180 feet in length. By this means it is hoped, by 1952, to increase fish production by about 150 per cent over the prewar average to 738,000 metric tons annually, of which approximately 330,000 metric tons would be herring and the remainder ground-fish. This would mean, in terms of increases over current production of individual items, in the case of fresh and salted fish 25 per cent; frozen and canned fish, 55 per cent; fish oils, 19 per cent; and fish meals, 7 per cent.

It is reported that Iceland is planning the construction of a fish-oil hardening and refining plant with a capacity of over 15,000 tons per annum, and refrigerating capacity will be built up to handle between 35,000 and 40,000 tons of frozen fillets annually.

British Newsprint Allowance Increased

As from April 24, English newspapers will be allowed to make a further increase in size, bringing the present five-page national daily up to six pages with appropriate increases in other cases. It is hoped that, at the beginning of July next, an increase of about 50 per cent in the permitted paper consumption of old-established periodicals will be possible, and also allowance of newspapers and periodicals, which are at present restricted to eight cwts. of paper in four months, to double this quantity. At present the daily newspaper in Britain alternates from four to six pages.—(*United Kingdom News*)

Transport System in Ireland Will Be Reorganized and Improved

British railway expert appointed to conduct investigations and suggest changes to effect improvements—Lengthy report includes numerous suggestions—Nationalization not recommended—Shipping facilities improving—Air services expanding satisfactorily.

By H. L. E. Priestman, Commercial Secretary for Canada

(Editor's Note—This is the third in a series of four articles on economic conditions in Ireland in 1948, prepared for *Foreign Trade*.)

DUBLIN, February 25, 1949.—Since January 1, 1945, the public transport system of Ireland, to the south and west of Dublin, has been almost entirely in the hands of Coras Iompair Eireann (usually referred to as C.I.E.), which was set up at that time as a statutory body under the Transport Act of 1944. In it were merged the Great Southern Railway Company and the Dublin United Tramway Company. It is empowered to acquire by agreement, subject to the sanction of the Minister for Industry and Commerce, any transport undertaking carried on by any other person. The Board of this body consists of a chairman appointed by the Minister for Industry and Commerce and six other directors representing the common stockholders. The chairman alone constitutes a quorum at Board meetings; no meeting may be held unless he is present, and no decision may be made without his concurrence. The wages, rates and conditions of employment are fixed by statute, and the company is not free to increase charges or to close down railway lines which have proved uneconomic.

C.I.E. has a virtual monopoly of local transportation services in Dublin and of road and rail freight and passenger services throughout the greater part of the twenty-six counties. It carries about 80 per cent of the total traffic conveyed by public services. During 1947, a 2½ per cent debenture to the amount of £1,350,000 was issued and was guaranteed by the Government.

Transport System under Investigation

According to the directors' report for 1947, there was a loss of nearly £1,000,000 on rail operations during the year. The Government appointed Sir James Milne, who has wide experience in connection with British railways, to conduct investigations into the Irish transport system and to offer suggestions for its improvement and reorganization. The report on the result of his survey, in which he had the co-operation of a number of eminent British authorities, has now been published, but there is as yet no indication as to whether the Government intends to act upon it.

The report has met with a mixed reception from the press and the public, the most common criticism being that Sir James is too railway-minded. Ireland has 1,633 miles of roadways per 100,000 of the population, compared with 260 miles in England and Wales, the tendency in recent years being to develop road passenger and freight services in the country districts. No new railway lines have been laid, and consideration has been given the question of closing down several uneconomic branch lines.

Sir James Milne appears to favour the development of a more efficient rail service rather than the door-to-door system of road transport, and he makes a number of suggestions which should help the railways to produce a

more satisfactory balance sheet. He points out that the conditions under which the various form of transport in Ireland operate are inequitable, owing to the unequal incidence of track costs as between rail, canal, and road transport, and draws attention to the "more onerous obligations and restrictions" imposed on public undertakings as compared with other operators. He recommends the setting up of a central highways authority to be responsible for the upkeep of the national system of highways, and that each form of transport should contribute on an equitable basis to their maintenance. He would concede the right of traders to carry their goods in their own transport wagons, with the proviso that this right should be subject to such conditions as would prevent unfair competition with public services.

Nationalization not Recommended

The suggestion of nationalization does not appear in Sir James Milne's report, but his proposals certainly envisage a national approach to the problem. He lays stress throughout on the importance of employing the various forms of transport to the greatest national advantage and of equitably dividing the cost of maintenance of the nation's highways. He disapproves of the principle of the administration of the affairs of a large public undertaking such as C.I.E. almost entirely by one individual and recommends that two additional directors (one of whom should be a representative of labour) be appointed, that responsibility be vested in the Board as a whole, and that the special powers of government directors should be limited to the right to veto capital expenditure. He suggests that "a much more stringent control" should be exercised over the purchase and issue of stores and other expenditure generally.

Sir James recommends that passenger services be improved, that some increase be made in fares and in speeds, that a number of diesel rail cars (which he considers the most suitable for this country) be acquired, that the rolling stock be overhauled, and that, when all obsolete vehicles have been discarded and necessary replenishments acquired, the stock should be called in for repair by a more regular and efficient system than that at present employed. He also draws attention to the urgent necessity of appointing a chief mechanical engineer, since this position has been vacant since 1944. Sir James admits that it is improbable that any reduction in expenditure can be effected until some of the arrears of renewals have been overtaken.

Recovery Will be Gradual

It is clear that any recovery from the present parlous state of C.I.E. can only be gradual, and Sir James suggests that the Government consider the desirability of assisting recovery by affording some relief from the liability to repay sums advanced under the guarantee of debenture interest and by meeting interest during construction on capital works undertaken in the national interest. The renewal programs outlined are likely to cost approximately £7,750,000. Completion of schemes already in hand, and another £2 million for equipment, tools, etc., brings the capital required to approximately £10,500,000. Accrued provisions for depreciation should finance £3,500,000 of this, and the company should be able to find another £1 million from other sources. A further issue of debenture stock will therefore be necessary to finance the remaining £6 million.

The report recommends that C.I.E. should exercise its powers under the Transport Act of 1944 to acquire the Grand Canal Company as a going concern, since full co-ordination of its road and canal services with those of C.I.E. could be more easily attained under common ownership.

Great Northern Railway Included in Survey

The Great Northern Railway (Ireland), the major part of whose operations are within the six counties of Northern Ireland, also claimed the attention of Sir James and his colleagues, since it operates both rail and road services in the northern part of the twenty-six counties. The report states that "some form of concerted action with the Government of Northern Ireland would appear to be necessary" and suggests, as a basis for such action, that the G.N.R. should continue to be responsible for the operation of rail and road services in the areas in which they are now provided, that ownership of the fixed assets of the company situated on either side of the border (between Northern Ireland and the 26 counties) should be taken over by C.I.E. and the Ulster Transport Authority respectively, but that the assets should continue to be used by the G.N.R.

The main point of the report is that transport should be co-ordinated, that the railways should be re-equipped and that costs of the maintenance of highways should be more equitably distributed between different users. It is clear that the problem of establishing an efficient and economic Irish Transport System is one of considerable complexity.

Shipping Facilities Improving

Irish shipping continues to improve its fleet, which has been burdened with many obsolescent vessels acquired during recent years. The *Irish Pine*, the latest addition and the largest vessel in the company's fleet, was built in England and delivered in December. It is 7,500 tons dead-weight and is designed for the North Atlantic cargo service. Four other vessels of 9,000 tons each, also being built in England, will be delivered during the next few months, and the company hopes by 1952 to have a modern fleet of 134,000 tons. At the beginning of 1948 the total tonnage was 50,000 tons.

Air Services in Satisfactory Condition

Aer Lingus, the Irish Airlines Company, continues to maintain its accident-free record, and in the first eight months of 1948 it had already carried 132,444 passengers, a number in excess of that carried in the whole of 1947. During the year the company purchased a number of DC 3's from Scandinavia—it had until then been employing a number of these machines on loan from BOAC—and has successfully converted them to passenger-carrying planes. By doing this work in Dublin, the company contends, it will save about £3,000 on each aircraft. Aer Lingus' effective fleet will then be thirteen passenger craft, five of which will be convertible to all-freight purposes. The purchase of a British Wayfarer is also being considered, as this type of plane is exceptionally well suited for the transport of livestock.

Consequent on the decision of the new Government (which took office in February, 1948) to abandon the project of an Irish transatlantic service, the five Constellations which had been purchased for that purpose were disposed of (at a profit of £65,000 each) shortly afterwards. The Lockheed Aircraft European Service Depot at Shannon Airport was bought by BOAC for transfer to Great Britain. During 1948 Aer Lingus disposed of its five remaining Vickers Vikings to Egypt. The company is at present operating services to London, Liverpool, Shannon, Glasgow, Manchester and Paris. During the holiday month of August, 27,197 passengers were carried, over 6,000 more than in August, 1947.

Industrial Expansion in Australia Seriously Affected by Shortages

Supply of labour, power, basic materials and factory space inadequate—New capital for investment abundant—Coal output lower—Gold-mining industry required government aid—Development of several industries planned.

By M. R. M. Dale, Assistant Commercial Secretary for Canada

(Editor's Note—This is the third in a series of articles on economic conditions in Australia in 1947-48, prepared for *Foreign Trade*. One pound equals \$3.2240 Canadian.)

SYDNEY, March 2, 1949.—Australia's program of industrial expansion has been seriously affected by shortages of labour, power, basic materials and factory space. It has been suggested that consumer products have been developed too quickly, as this activity has detracted from the production of coal, iron, steel and industrial chemicals, which are essential to support the country's superstructure.

The annual report of the Australian Tariff Board stressed the need for more efficiency in Australian industry and pointed out that many local industries were sheltered, not only by the tariff but by the high cost of overseas products and by the protective effect of import licences. "As a result, many manufacturers claim credit for an efficiency of competitiveness which has been thrust upon them by national or international costs beyond their control."

The Australian Institute of Public Affairs, in discussing the results of the 40-hour week, came to the following conclusions:

1. That production had fallen in direct proportion to the reduction in hours worked.
2. No change had resulted in the output per man-hour.
3. Many firms had found it necessary to work overtime to maintain their former production levels.
4. In many cases a reduction of 10 per cent in the hours worked was reflected in an increase in costs of about 10 per cent.
5. Management had shown increased interest in incentive schemes, but union labour is still hostile to them.
6. There is apparently no change in the factors of labour, discipline, absenteeism or labour turnover.

Abundant New Capital for Investment

In the three years since the war ended, a total of £181,250,000 (\$585,890,625) of new capital for Australian industry was either planned or issued. During the period up to June, 1948, a total of £51,250,000 was listed for new ventures, and £130,000,000 was offered for the expansion of established businesses. Of this, £112,500,000 was being raised in Australia, the United Kingdom contributing £40,000,000 and the United States £23,750,000.

Flow of new capital for industry by public subscription in Australia last year was £44,542,388, an increase of about £19,000,000, or 74 per cent, on new capital subscribed in 1947 and more than five times the amount publicly raised in 1946.

The Commonwealth Government now has holdings in corporations, companies and trading commissions valued at £17,000,000. These include:

Australian National Airlines Commission.—£3,670,000 advanced by Commonwealth to date.

Qantas Empire Airways Ltd.—Issued capital, £2,523,000; Commonwealth holding, £2,523,000.

British Commonwealth Pacific Airlines Ltd.—Issued capital, £1,000,000; Commonwealth holding, £500,000.

Tasman Empire Airways Ltd.—Issued capital, £N.Z.500,000; Commonwealth holding, about £170,000.

Overseas Telecommunications Commission.—£3,000,000 to be advanced; so far £1,425,000 made available.

Christmas Island Phosphate Commission.—Issued capital, about £3,000,000; Commonwealth holding, about £1,500,000.

British Phosphate Commission (Nauru and Ocean Island).—£3,500,000 advanced by United Kingdom (42 per cent), Australia (42 per cent) and New Zealand (16 per cent).

Commonwealth Oil Refineries Ltd.—Issued capital, £850,000; Commonwealth holding, £425,000.

Australian Aluminum Production Commission.—£3,000,000 to be advanced equally by the Commonwealth and Tasmania; about £300,000 so far advanced by the partners.

Amalgamated Wireless (Asia) Ltd.—Issued capital, £418,845; Commonwealth holding, £212,500.

Commonwealth Engineering Company Ltd.—Issued capital, £300,000; Commonwealth holding, £163,200.

Output of Coal Reduced

It is estimated that total coal production in 1948, including 1,252,785 tons of open-cut coal, was 11,711,064 tons. Underground coal production this year was 700,000 tons less than in 1939, the result of strikes and reduced output per man. Strikes accounted for the loss of 2,027,445 tons during the year, thus offsetting gains from open-cut production. Although production was 1,200,000 tons less than the estimated amount (12,900,000 tons) required for the year, total production is the highest since 1942 and the third highest in the last ten years, as a result of the development of open-cut mining.

During the last few months of the year the miners responded to an appeal for increased production to make ample supplies available for the Christmas period and thus ensure annual holidays for the miners. Only during this period was the fortnightly target of 550,000 tons reached.

The Joint Coal Board plans to spend £16,000,000 on modernizing and mechanizing their coal mines. As a first instalment, the Board has made the use of power-bores compulsory throughout the industry.

The Joint Coal Board plans to expand output of existing New South Wales Coal mines and to open new mines in an effort to meet a demand for 16,000,000 to 17,000,000 tons of black coal in 1952. Apart from sharply rising requirements of the industry, there is an urgent need to establish minimum working stocks, so that consumption will not be dependent from day to day on transport difficulties, unforeseen variations in production and even the vagaries of the weather.

Production of Briquettes Projected

The Victorian State Electrical Commission will take over more than 8,000 acres of land for a new briquette project. Excavation for the open cut will begin shortly, and work has been started on the manufacture in Australia of an overburden dredge and a coal dredge based on plans of German design. High priority has been given to the project which, with the Kiewa hydro-electric scheme, would be an important step towards making the state independent of outside coal supplies.



Tasmania—Electrolytic Zinc Company of Australia, Limited, at Risdon. Australian zinc production in 1947-48 rose from 69,900 tons in 1946-47 to 74,000 tons in 1947-48, compared with some 69,800 tons in the prewar year.

The Victorian Government has decided to import 100,000 tons of coal from India during 1949. It has been stated that the Indian Government would supply the coal immediately, and it would be sent to Australia as fast as the Government could obtain shipping. The coal would cost about 58s. 10d. a ton, loaded at an Indian port. One hundred and twenty thousand tons of coal will also be imported from the United Kingdom.

Marginal Gold Mines Subsidized

The Australian gold-mining industry was confronted with the problem of a shortage of skilled labour and a slow but gradual rise in costs against a fixed price for gold. As a result of an investigation of mining conditions in Western Australia, the Federal Government agreed to assist some marginal mines by granting them subsidies to cover legitimate cuts and to give them a margin of 4 per cent in paid-up share capital after taking into account income from other sources.

The Victorian Government will distribute £17,500 on a pound for pound basis among five Bendigo gold mines in an effort to stimulate gold production in Victoria. The grant is to allow companies to carry on developmental and exploratory work.

Gold output this year amounted to 905,000 ounces, which was 14,000 ounces less than last year. In 1938-39 the yield was 1,610,000 ounces.

Local Rayon Industry on Permanent Basis

It was recently reported that the Australian rayon industry was being established on a permanent basis and that at least two United Kingdom companies were considering the setting up of a plant in Australia for the production of filament yarn. The industry in Australia is requesting greatly increased tariff protection.

Establishment of an oil refinery in Victoria, at a cost of £1,500,000, was recently announced. The factory would take about two years to establish and would have its own wharf for tankers and its own railway siding. It would provide employment for 500 people. Extensive investigations into oil areas in Victoria were also announced, and a district near the South Australian border has been marked for oil exploration. It has been established beyond reasonable doubt that Central Queensland is oil-bearing and, because of this, the Commonwealth will accelerate the scientific research in which it has been engaged in this area.

Zinc Production Reduced

Latest statistics show that Australian zinc production in 1947-48 was only 4,200 tons above the prewar output. Production rose from 69,900 tons in 1946-47 to 74,000 tons in 1947-48 as against output of 69,800 tons in the prewar year. Highest production of zinc was 80,500 tons in 1945-46.

The home consumption price of zinc has been raised by £18 a ton and that of lead by £13 a ton. The states have agreed to the higher prices subject to two conditions: (1) The Commonwealth shall make arrangements with the producers for an adequate supply of zinc and lead for Australia's domestic needs; and (2) the Commonwealth shall restrict the export of scrap lead and, in consultation with the states, arrange to control the distribution of zinc and lead to essential home users.

It is believed that the decision to increase the price of zinc is more likely to result in reduced rather than increased housing costs, as it will mean that more locally produced zinc is available for housing material and will limit the necessity for importing higher-cost material from abroad.

Additional Aid for Industrial Rubber Industry

The government is expected to provide an additional £2,000,000 in dollars before June 30 to increase the production of tires and tubes. According to an official report, the government provided £1,500,000 in dollars for the six months ending December 31 for raw materials for the rubber industry. The report gives the following figures of annual demand for tires: 1,350,000 for motor-cars, motorcycles and utility vehicles—25 per cent more than before the war; 54,000 for trucks and tractors—135 per cent more than in the prewar period; 600 for earth-moving equipment, 2,500 for aircraft, and 1,600,000 for bicycles.

Mechanization of industry has increased the demand for industrial hose to 8,000,000 feet and for belting to 3,000,000 feet, the report adds. It is estimated that Australian plants could meet all demands with more labour.

The International Harvester Company hopes to produce an entirely Australian-built tractor. Officials of the company outlined their plans recently and stated that they proposed to import the engines initially, but later would install plant to manufacture engines.

Ballarat Paper Company Established

Following the formation of the new paper-manufacturing company of Thomas Owen and Company (Australia) of Burnie, Tasmania, negotiations have now been completed between Associated Pulp and Paper Mills Ltd.; British Coated Board and Paper Mills Ltd., of Treforest, Wales; and Thomas Owen and Company (Australia) Ltd., to establish a mill for producing coated papers at Ballarat, Victoria. The new company—Ballarat Paper Mills Pty. Ltd.—will have a nominal capital of £1,000,000. Subject

to Capital Issues approval, 200,000 cumulative preference and 300,000 ordinary shares of £1 will be issued. The latter will be held equally by the three companies. No shares will be offered for public subscription.

Research by Australian experts will mean an annual saving of millions of feet of timber formerly written off as waste. Many millions of square feet of Queensland timber varieties, which until recently were regarded as useless and were burned, can now be used—saved with a process for immunizing sapwood against the powder post borer.

Plywood shortage also will be relieved greatly. A modified rapid process has been developed to embrace more types of timber at low treatment cost.

Miners are recovering an intensely radioactive mineral, believed to be pitchblende, from an exploratory shaft in a district in South Australia. The ore has not been definitely identified, but it is said to have the radioactive intensity of pitchblende.

Aluminum Industry Projected

At a research laboratory near Hobart, Tasmania, a small group of scientists is working to ensure the successful establishment of the Native Point aluminum works. Officially designated as Developmental Laboratory, Australian Aluminum Industry Commission, the centre is engaged in assessing the suitability of Australian ores and process materials for the local production of aluminum.

Bauxite for the industry will be drawn from two large Tasmanian deposits and from New South Wales and Victoria. When operations begin in 1951, the annual production will total 10,000 tons of aluminum ingot. This will require from 42,000 to 45,000 tons of bauxite, 35,000 tons of coal, 2,000 tons of lime, and 2,500 tons of soda ash. Large as the output will be, little difficulty is expected in its disposal. It is currently reported that private enterprise may be allowed to share in the aluminum industry in Australia.

Pelagic Fishing to be Developed

Fishermen at Eden, New South Wales, and a small Sydney fishing company are pioneering what may become a major development of the state's fishing industry. This is the capture, in commercial quantities, of pelagic (near surface) fish. It is reported that this type of fishing could supply all the canned fish Australia needs and provide a basis for a lucrative export industry.

Pelagic fish in state waters include sardines, mackerel, sprats, anchovies and tuna. Tuna exports might become one of Australia's substantial dollar earners. The trade in frozen and canned tuna could rise to more than \$8,000,000 annually, and it is probable that the first big consignment of tuna will leave Australia early in 1949.

The frozen and canned crayfish industry of Western Australia is currently earning one million American dollars per annum and is operated principally by two floating canneries which proceed around the Western Australian coast, going from one crayfish area to another.

Joint Marketing of Hides and Leather Planned

A Bill to set up joint Commonwealth and state marketing of hides and leather was introduced in the House of Representatives in November. The aim is to avoid serious dislocation of the leather and footwear industries while there is a wide difference between export and domestic prices. It was announced that a central pool of hides would be established, from which Australian requirements would be allocated to tanners at fixed prices, the remainder being sold for export. The returns would be pooled, and the hide producer would receive the equalized return.

Unless the plan is implemented, it would be almost impossible to maintain a home consumption price structure. Failure in that direction would mean dislocation of important industries, a probable shortage of footwear and a rise in prices up to £1 a pair for boots and shoes.

Skim-milk Factory to be Established

Laboratories and a modern pilot plant are to be erected in Victoria to investigate how the fullest use can be made of skim milk as a human food. The view is that, in an ill-fed world, the present practice of feeding much of the high-quality protein, lactose, mineral salts and vitamins of skim milk to stock leaves much to be desired.

The dairy products' research section will largely devote its efforts to increasing the efficiency of that section of dairy manufacture which makes the fullest use of milk constituents. The section will also help develop a means of using skim-milk solids and also skim milk as a human food.

Hydro Scheme to Save Coal

An investigating committee has recommended the building of a new hydro-electric plant to save 4,000,000 tons of coal a year. The scheme would harness the waters of certain rivers—the Snowy, Upper Murrumbidgee, Tumut, and Tooma—to produce 1,750,000 kilowatts of electricity. In addition, the waters of the Snowy River, which now run to waste, would be diverted inland for irrigation.

Provision of the hydro-electric power would be a national task for the New South Wales, Victorian and Federal governments. The estimated cost would be £45,000,000.

Pearling and Oyster Culture being Studied

One hundred and two vessels were engaged in pearling last October. This industry is rapidly expanding, but fishing facilities are improving only slowly. Late this year a 75-foot vessel left Sydney for Thursday Island, Torres Strait, to study the pearl-shell oyster and to begin the first Australian experiments with the culture pearl. Japan is the home of the culture pearl. Two years ago the Commonwealth Fisheries Office sent an officer to that country to study the technique of production. The Japanese freely revealed all they knew and offered to send experts to assist with experiments, but the offer was not accepted.

At present the pearl oyster is not cultivated in Australian waters as is the edible oyster in New South Wales. Scientists will develop their own oyster beds, adopting the Japanese method of growing the oyster on wire suspended from floating rafts. They will also study the oysters in their natural beds—their distribution, growth rate, how they breed, how to crop them, and how to conserve them. Japan is the inspiration of another major Australian oyster experiment. This is with the Pacific oyster, a large edible variety suitable for smoking and canning. Scientists hope it will grow and breed successfully in the colder southern waters.

Imperial Chemical Industries Expanding

Imperial Chemical Industries is spending £4,000,000 on construction and expansion of its works throughout Australia. Seven hundred employees are required for new jobs, and this company, one of the largest explosives and chemical manufacturing firms in the world, is desirous of obtaining British migrants.

A proposed £500,000 plaster works in South Australia will make use of extensive deposits of high-grade gypsum and is expected to meet Australian requirements and have a considerable surplus for export.

Latin America Important Supply Source and Market for Canada

Venezuela, Mexico, Cuba, Brazil and Dominican Republic among ten principal suppliers last year—Canadian trade with twenty countries valued at \$345,008,000—Venezuela, Cuba, Panama, the Dominican Republic, Guatemala, El Salvador, Haiti and Honduras well supplied with dollars.

By Alfred Savard, Area Officer, Canadian Trade Commissioner Service

(Editor's Note—This summary of conditions in Latin America was prepared by Mr. Savard, following a visit to most of the countries in his territory.)

LATIN AMERICA, as a market for Canadian commodities and a source of supply for materials required by this country, has a relatively short trade history. Progress has been rapid, however, and five Latin American republics are listed among the ten principal countries from which Canada imported goods in 1948. Venezuela is in third place, after the United States and Great Britain, with Mexico sixth, Cuba seventh, Brazil ninth, and the Dominican Republic tenth. Canada's trade with the twenty Latin American Republics was valued at \$345,008,000, of which imports were valued at \$221,259,000 and exports at \$123,749,000.

This trade is featured by the fact that it was transacted on a cash basis in United States dollars, and by the increasingly wide range of commodities now being exported by Canada to Latin America. For example, Canadian exports included sewing-machines valued at \$6,000,000 and new ships valued at \$8,500,000, these deliveries having been made during the past year.

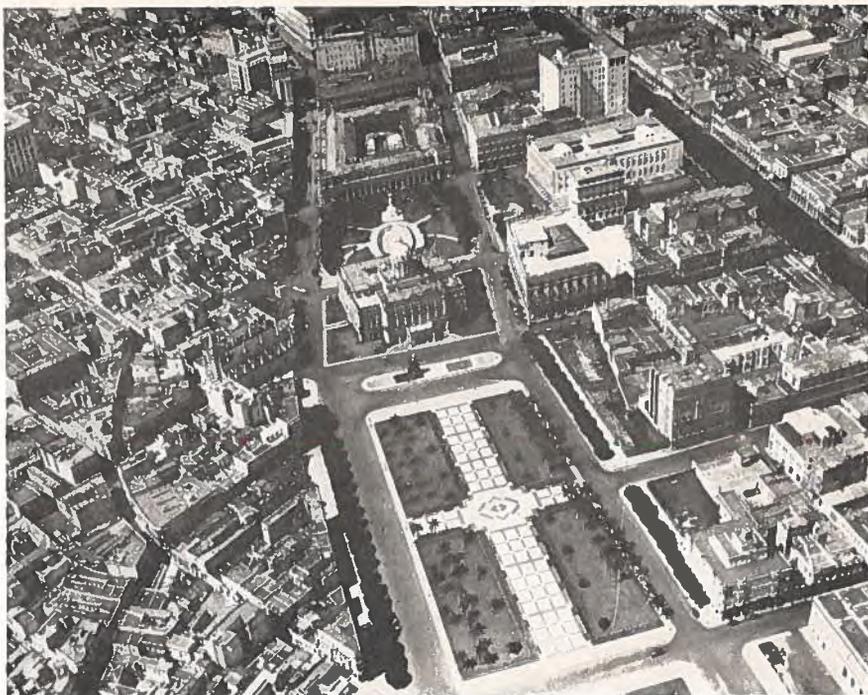
The Latin American republics may be divided into two classes for trade purposes. The first comprises those supplied with sufficient dollars with which to meet all their requirements, these being Venezuela, Cuba, Panama, the Dominican Republic, Guatemala, El Salvador, Haiti and Honduras. The second class comprises those which, while earning dollars, are not at present adequately supplied with dollars to meet all their import requirements from hard-currency countries. These are Argentina, Bolivia, Brazil, Chile, Colombia, Costa Rica, Ecuador, Mexico, Nicaragua, Paraguay, Peru and Uruguay. All these countries have introduced some form of import control. Although reserves of foreign exchange accumulated during the war have been largely depleted, all the Latin American countries are in a position to pay for essential imports with United States dollars, with the exception of Argentina.

The republics offering the principal markets are: Brazil, Venezuela, Argentina, Mexico and Cuba. The five principal sources of supply for Canada are: Venezuela, Mexico, Cuba, Brazil and the Dominican Republic. Conditions influencing trade between Canada and Latin America are briefly summarized in the following reviews of the six principal countries, based on the total value of their trade with Canada last year:

Venezuela

Canadian Exports in 1948	\$16,934,563
Canadian Imports in 1948	94,758,279

Canada's trade with Venezuela has shown increases that have been curbed only by the scarcity of goods required, and by the willingness of the Canadian exporter to reserve for this market commodities for which



Havana, capital of Cuba, which provides a solid market for Canadian products that do not compete with those from the United States.

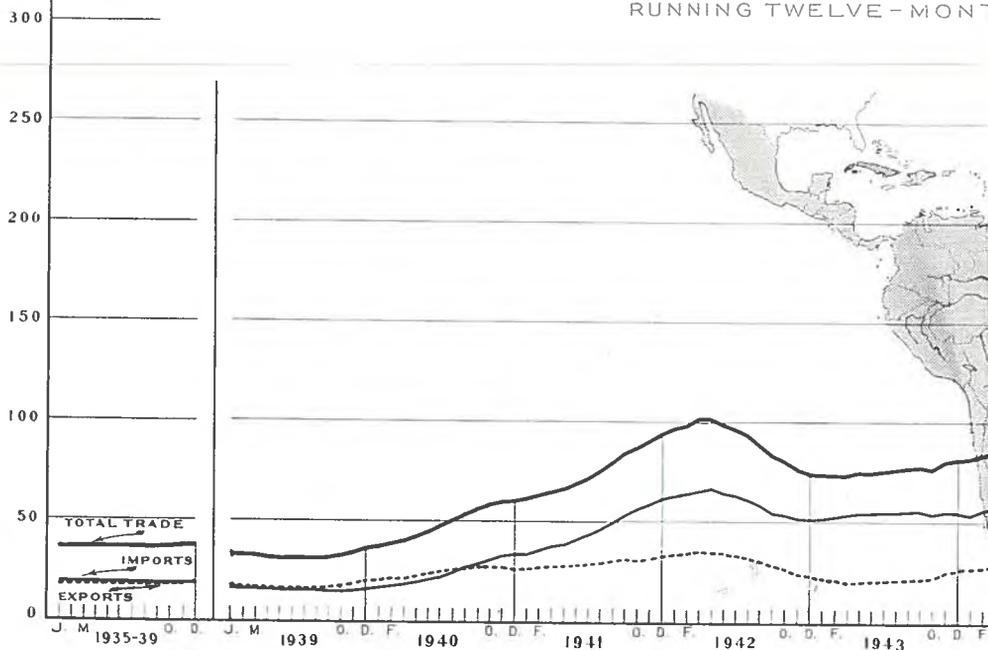
Mexico City, capital of Mexico, for which Canada was the second most important source of supply last year. Sizeable market is expected to develop for certain products.



MILLION DOLLARS

CANADIAN TRADE WITH LATIN AMERICAN REPUBLICS, 1939-48

RUNNING TWELVE-MONTH



Canadian Trade

Canadian Exports

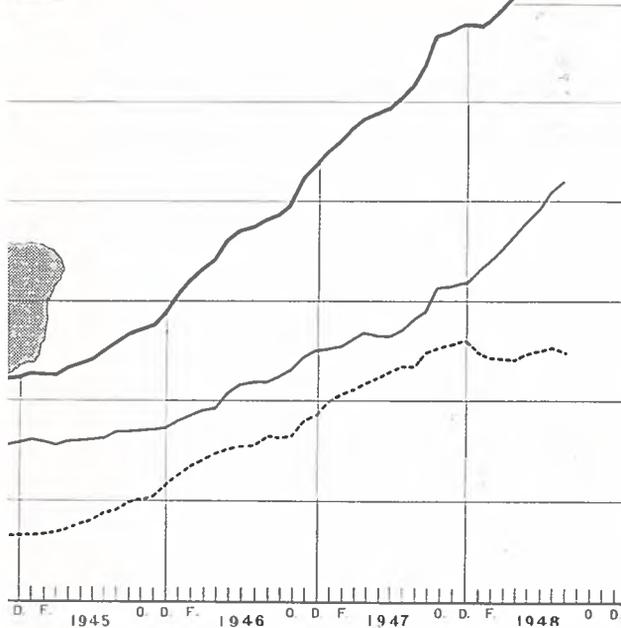
Country	Twelve Months ended August					
	Average 1935-39		1947		1948	
	Value \$'000	Per cent	Value \$'000	Per cent	Value \$'000	Per cent
Argentina.....	4,609	25.7	28,069	24.0	21,722	17.4
Bolivia.....	115	0.6	529	0.5	830	0.7
Brazil.....	3,700	20.6	26,012	22.2	34,552	27.7
Chile.....	826	4.6	4,204	3.6	3,477	2.8
Colombia.....	1,210	6.7	9,567	8.2	8,841	7.1
Costa Rica.....	95	0.5	1,550	1.3	1,001	0.8
Cuba.....	1,384	7.7	6,560	5.6	9,847	7.9
Dominican Republic.....	185	1.0	1,836	1.6	2,193	1.8
Ecuador.....	95	0.5	1,447	1.2	1,153	0.9
Guatemala.....	109	0.6	1,451	1.2	1,338	1.1
Haiti.....	139	0.8	1,354	1.2	1,297	1.0
Honduras.....	153	0.9	674	0.6	496	0.4
Mexico.....	2,518	14.0	11,067	9.5	14,570	11.7
Nicaragua.....	67	0.4	503	0.4	624	0.5
Panama.....	314	1.7	1,886	1.6	2,141	1.7
Paraguay.....	8		133	0.1	360	0.3
Peru.....	1,019	5.7	4,006	3.4	2,457	2.0
Salvador.....	64	0.4	561	0.5	882	0.7
Uruguay.....	310	1.7	3,583	3.1	3,737	3.0
Venezuela.....	1,024	5.7	12,037	10.3	13,306	10.7
TOTAL.....	17,944	100.0	117,028	100.0	124,824	100.0

¹ Less than one-tenth of one per cent.

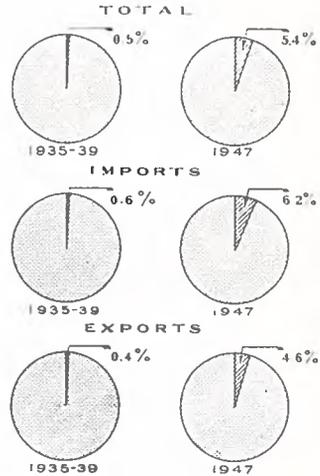
² Less than \$1,000.

PERAGE FOR THE BASE PERIOD, 1935-39

ALS



RELATIVE PROPORTIONS OF TRADE WITH LATIN AMERICAN REPUBLICS TO TOTAL CANADIAN TRADE AVERAGE FOR THE BASE PERIOD 1935-39 COMPARED WITH LATEST COMPLETED CALENDAR YEAR



Latin America

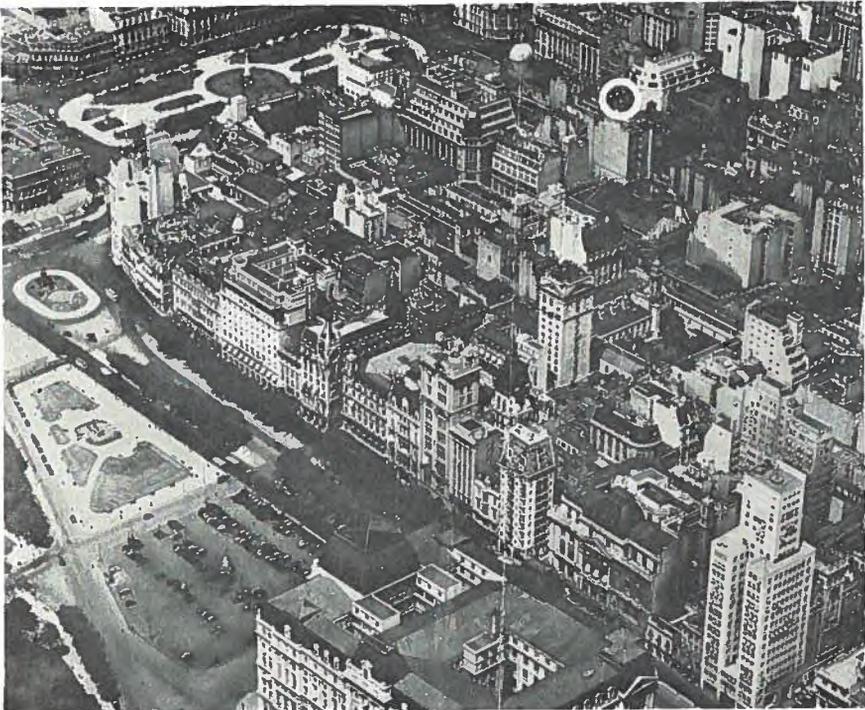
Canadian Imports

Country	Twelve Months ended August					
	Average 1935-39		1947		1948	
	Value \$'000	Per cent	Value \$'000	Per cent	Value \$'000	Per cent
Argentina	5,131	28.1	21,543	15.2	12,065	5.7
Bolivia	26	0.1	8		Nil	
Brazil	881	4.8	11,554	8.2	19,866	9.5
Chile	97	0.5	465	0.3	306	0.1
Colombia	5,074	27.7	8,664	6.1	8,607	4.1
Costa Rica	67	0.4	1,698	1.2	2,693	1.3
Cuba	499	2.7	15,822	11.2	25,445	12.1
Dominican Republic	35	0.2	8,065	5.7	14,124	6.7
Ecuador	41	0.2	173	0.1	667	0.3
Guatemala	54	0.3	7,162	5.1	8,583	4.0
Haiti	64	0.3	172	0.1	224	0.1
Honduras	55	0.3	9,917	7.0	5,189	2.1
Mexico	671	3.7	11,865	8.4	28,806	13.3
Nicaragua			86	0.1	180	0.2
Panama	36	0.2	2,036	1.4	695	0.6
Paraguay	55	0.3	234	0.2	269	0.5
Peru	3,780	20.7	588	0.4	431	0.1
Salvador	16	0.1	1,242	0.9	1,197	0.1
Uruguay	159	0.9	477	0.3	511	0.2
Venezuela	1,550	8.5	39,839	28.1	80,001	38.1
TOTAL	18,290	100.0	141,611	100.0	209,860	100.0



Rio de Janeiro, capital of Brazil, to which Canada's exports during the past year were larger than to any other Latin American country, being valued at \$28,601,000.

Buenos Aires, capital of Argentina, to which Canada exported goods valued at \$16,680,000 last year. Trade prospects are considered far from favourable at present.



there is a demand. As the population of Venezuela is only 4,500,000, that country will not constitute a large market in the foreseeable future. However, it has not received from Canada the volume of merchandise that can be absorbed, as indicated by comparative figures for the United States.

Agricultural and industrial development programs are being undertaken by the government, which is keenly aware of the danger of depending exclusively on the oil industry for its well-being.

Venezuela is entirely dependent on imports for almost all its food requirements.

Venezuela was Canada's principal source of supply for crude petroleum in 1948.

This country provides a market for almost any product exported by Canada.

Brazil

Canadian Exports in 1948	\$28,600,782
Canadian Imports in 1948	20,559,391

Canadian exports to Brazil in 1948 were greater than to any other republic in Latin America.

Brazil has shown the best recovery of any country in South America from the serious financial condition that developed in 1947, when she had an unfavourable trade balance of \$200,000,000 with the United States. As a result of her import controls, exchange controls and larger exports to the United States, a favourable balance of \$16,000,000 was created in her trade with that country last year. While Brazil is not earning sufficient dollars to meet all her import requirements, there are sufficient for the purchase of essentials.

Industrial development taking place in the São Paulo area would be considered impressive in either Europe or North America, and is made possible by the adequate supplies of electric power.

Steel production in the Volta Redonda plant amounted to 232,000 tons during its first year of operation. It is expected that production will be doubled this year, as the necessary equipment for such expansion has already been installed. Although this plant does not meet Brazil's steel requirements, it does provide a saving in dollars that were formerly needed to pay for imported steel. Brazil has sufficient coal and iron ore for the continued operation of this plant, and adequate supplies of iron ore for shipment to the United States and of coal for shipment to Argentina, the principal markets at present for these products.

Agriculture is receiving serious consideration in Brazil, as it is realized that any improvement in the standard of living and industrialization of the nation depends to a large extent on increased farm production. Mechanization provides a solution to the problem, and it is likely that agricultural machinery will comprise a large part of Canada's exports to Brazil for some time to come.

Brazil has a population of 40,000,000, adequate technical knowledge and large natural resources, but requires capital for their further development. While much has been accomplished, there is still much to be done.

Mexico

Canadian Exports in 1948	\$15,045,175
Canadian Imports in 1948	27,257,860

Canada was the second most important source of supply last year, having established a demand for newsprint, malt, aluminum and asbestos. It is expected that a sizeable market will develop for agricultural machinery, and that Mexico will import an increasing number of Canadian cattle to replace those lost as a result of the serious outbreak of hoof-and-mouth

disease. While this scourge caused almost irreparable loss to the country, it was responsible for establishment of a meat-packing industry, unaffected cattle having been slaughtered in an effort to eliminate the disease.

Industrial progress was made in Mexico during the war years, much of this having contributed to the enhanced economy of the country. It has not yet been determined whether some of the plants that came into operation will survive in the face of foreign competition over the years. As in many countries, the attractions of industrial employment have created a drain on agriculture. Whereas Mexico was formerly self-sufficient, she is finding it increasingly difficult to provide an adequate supply of foodstuffs for the population.

Cuba

Canadian Exports in 1948	\$10,986,791
Canadian Imports in 1948	22,601,489

Cuba provides a solid market for Canadian products that do not compete with those from the United States, such as dried codfish, newsprint and malt.

Part of the United States tariff preference has been eliminated under the Geneva Trade Agreement. A 20 per cent surcharge on the established tariff, which affects Canadian goods entering Cuba, should be eliminated shortly. Although the present tariff does favour United States products, the actual landed cost on a large number is small. The tariff and market should be the subject of careful study before it is concluded that, for tariff reasons, a certain Canadian item cannot compete with similar products from other countries.

Argentina

Canadian Exports in 1948	\$16,680,361
Canadian Imports in 1948	5,745,803

Argentina operated before the war under the same triangular trade pattern as did Canada, with the result that its large favourable trade balance with the United Kingdom was readily convertible for the settlement of purchases in the United States. Since the war, Argentina has been unable to convert its even larger trade balance with Europe, except during a short period in 1947, and is presently short of hard-currency with which to meet its requirements in hard-currency markets.

Trade prospects with Argentina are presently unfavourable, and it is not possible to determine when this situation is likely to change for the better.

Dominican Republic

Canadian Exports in 1948	\$ 2,385,550
Canadian Imports in 1948	17,270,035

Prior to the war, Canada's total trade with the Dominican Republic was valued at less than \$300,000. During the past year, however, it was the second most important source of supply for raw sugar imported by Canada next to Cuba.

As sugar and bananas are intensively cultivated in the Dominican Republic, it provides a favourable market for fertilizers, as well as a moderate market for a wide range of manufactured articles and the cheaper foodstuffs.

Conditions Favour Trade with Latin America

Despite import restrictions in several Latin American countries, Canada's exports in 1948 to that group showed a decline of only 6 per cent

from the record established in 1947. Thirteen of the twenty increased the value of their purchases from Canada last year, while ten increased the value of their exports to Canada. Conditions favour trade between Canada and Latin America for the following reasons:

(a) Domestic economic conditions in most Latin American countries are good.

(b) Latin American countries are producing dollars, exports to the United States amounting in 1947 to \$2,000 millions, while a similar figure is indicated in preliminary returns for 1948.

(c) Where in operation, foreign exchange and import controls have functioned satisfactorily, and the experience gained in the past year is bearing fruit.

(d) "Offshore" procurement authorizations, under the Economic Co-operation Administration, amounted to more than \$300,000,000 in Latin America in 1948.

(e) Canada is better known as a possible source of supply.

(f) Latin America is a natural and increasing market for newsprint, aluminum, wheat flour, asbestos, agricultural machinery, foodstuffs, mining machinery, electric cable and consumer goods that can be classified as essentials.

(g) More producers are turning to Latin America for the first time, and giving serious consideration to markets there.

(h) More goods of the type needed in Latin America are becoming available.

France and Italy Establish Customs and Economic Union

Rome, April 22, 1949.—France and Italy signed an agreement on March 26, 1949, providing for the establishment of a customs and economic union that represents another forward step on the road to an integrated economy for Europe. Provision is made for the creation of a customs union within one year of the agreement being placed in effect, for a plan for economic union to be set up in two years, and for economic union itself within six years. The agreement must be ratified by both governments.

The agreement establishes a common customs tariff for imports within the union, and provides for complete abolition of duties on products moving within the area. Customs revenue will be divided between the two countries on a basis yet to be determined. Restrictions will be gradually suppressed, though provision has been made for state monopolies to be continued into the union.

Exports from Italy to France in 1948 amounted to \$47,700,000, while imports were valued at only \$16,200,000. The principal exports to France were: Citrus fruit, cotton thread, dried fruit, sulphur, machinery, cotton manufactures, automotive vehicles, jute and hemp. Imports from France are more diversified, and consist mainly of raw materials, including iron and steel, fish (mostly cod and canned tuna), stone and non-metallic minerals, fertilizers, machinery, inorganic chemicals, paper and cardboard, and wool.

Credit Terms for German Exports Extended

Frankfurt, May 3, 1949.—(FTS)—The Joint Export Import Agency has announced that credit terms for German exports have been extended by permitting German exporters to sell against time drafts not exceeding 90 days to buyers in the United States, Canada and other countries with which Western Germany has payments agreements. No credit terms were previously permissible without special approval from JEIA, other than letters of credit and sight drafts.

East Bengal Principal Producer Of High Quality Jute Fibre

*Eighty per cent of world output grown in this province—
Crop is sown from February to May and harvested from
June to September—Average production is about 1,300
pounds per acre.*

By G. A. Browne, Acting Canadian Government Trade Commissioner

(Editor's Note—This is the second in a series of articles on agriculture in Pakistan, prepared for *Foreign Trade*.)

KARACHI.—Pakistan's principal crop is jute, or more properly, jute fibre. It grows in East Bengal, a territory which produces not only the finest varieties of fibre but almost 80 per cent of the world output. The plant (*corchorus capsularies* and *corchorus olitorius*) is an annual, growing in a single stem, with top branches appearing as it approaches maturity. Around the central stick or core of stalk, which reaches heights of from eight to ten feet, is a layer of pith. When this is removed, by the process of retting, it dissolves, leaving the actual fibres, called jute.

The crop is sown from February to May and harvested from June to September. The *olitorius* or "tossa" (golden yellow) is the stronger fibre and is usually sown and harvested later than the white (*capsularies*) variety. The yield varies with seed, nature of the soil of the particular district, and weather and river conditions (high or low water). An average crop produces about 1,300 pounds of fibre per acre, or slightly more than three bales of 400 pounds each, although exceptional records of as high as 3,280 pounds, or 8·2 bales, have been produced.

The principal feature of jute is its low cost as a wrapping material. With the development of manufacturing methods, the finer jute yarns are now used for tarpaulins, canvas curtains, upholstery fabrics and carpets. The main use of the standard grades is, of course, for making bagging materials (gunnies) and hessians.

The preparation of the fibre for market requires experience, since quality may be affected by early or late cutting, and differences in retting may have an adverse effect on its colour and strength.

Leaves Are Submerged in Water

The plant is usually harvested at flowering time, tied in bundles and left until the leaves wither and drop off. They are then submerged in water, usually of a nearby river, for a period of ten days to three weeks, until the pithy layer about the central core has fermented and the fibre can be peeled off. This is called retting. The fibres are then washed, dried and bundled for despatch to the baling press.

At the press the "kutchra", or temporary bales which have been made up by the various sorters and buyers between the grower and the baling and shipping point, are "pucca" baled. By this process, the less wieldy of the temporary bales are hydraulically compressed into a permanent steel-strapped bale, averaging 406 pounds in weight and 10·5 cubic feet in volume.

The "pucca" baling capacity at present in East Bengal is about 2·5 million bales per year maximum, or about half of that desired. By the

end of 1949, it is hoped that, as a result of the installation of thirteen new hydraulic presses in the jute centres of East Bengal, capacity will be up to 4.5 million bales annually.

Jute Year Runs from July to June

The jute year, which comprises the harvesting, retting, collecting, movement to baling centres and baling and shipment, runs, for statistical and market purposes, from July to June. Jute is a regulated crop for reasons both of protection of the price to grower and user, and prevention of the use of acreage needed for food grains.

Acreage and Yield of Jute in Pakistan

District (in East Bengal)	Area		Estimated Yield	
	1946-47 Acres	1947-48 Acres	1946-47 Bales of 400 Pounds	1947-48 Bales of 400 Pounds
Tippera	129,310	186,615	426,725	597,170
Jessore	77,965	106,090	288,470	379,270
Baarkganj	31,905	39,575	105,305	114,965
Dacca	138,895	205,080	458,370	758,795
Nadia (Kushtia)	49,225	43,175	147,675	133,845
Mymensingh	295,330	511,695	764,905	1,829,310
Noakali	26,830	41,300	69,490	103,250
Chittagong	350	460	980	920
Bogra	53,900	82,460	172,480	214,395
Rangpur	167,025	272,925	467,670	927,945
Rajshahi	69,030	102,110	227,805	316,540
Sylhet	23,000	27,865	74,500	94,740
Faridpur	165,495	201,315	463,245	629,110
Dinajpur	62,359	103,330	187,185	289,325
Khulna	23,060	30,565	70,105	88,640
Pabna	68,840	104,110	203,075	364,385
Total	1,373,555	2,058,670	4,127,985	6,842,605

The principal buyers of Pakistan raw jute are India, the United States, the United Kingdom, Belgium, France, Italy and Australia. India takes from 4.5 million to 5 million bales annually, the remaining quantity, varying from 2 to 2.5 million bales, being available for export to other countries, as shown above. At present, Pakistan has no jute mills in which to process her own fibre, but plans are being made to establish two mills in the jute area as the start of a jute manufacturing industry.

The value of raw jute shipped from Chittagong to all countries during the period August 15, 1947, to March 31, 1948, was Rs.77,624,097 (or Can.\$23,458,002).

Raw Jute Exports from Chittagong

(Period August 15, 1947, to March 31, 1948)

	(Rupees)		(Rupees)
Total	77,624,097	Sweden	74,500
United Kingdom	17,585,695	Germany	1,245,989
Belgium	10,498,521	Hungary	138,750
Netherlands	786,716	Yugoslavia	914,000
United States	18,532,087	Greece	646,278
Palestine	26,425	Ireland	63,000
Denmark	59,805	Canada	599,957
Czechoslovakia	328,700	Chile	302,500
France	9,353,480	Austria	53,330
Italy	9,137,155	Poland	238,667
Egypt	522,267	Norway	140,420
Australia	2,675,415	Portugal	145,000
New Zealand	55,160	Indian Ports	3,500,280

These values reflect the export, rather than the market price, of raw jute shipped by sea or across the Pakistan land frontier to India. The standard export duty on raw jute is Rs.15 per bale of 400 pounds, which represents 8.5 per cent of the present market price of jute before baling.

Low Prices Must be Maintained by Jute Industry

One of the East Bengal jute industry's problems will be that of maintaining low prices despite heavy new costs of machinery and improved transport arrangements. The price of jute has advanced much more relatively than have other packing materials, and it will hold its present dominant position only as long as it does not become more costly than several good substitutes, such as multi-wall kraft paper bags, "fibro" and other vegetable fibre manufactures, hemp, sisal and ramie and hibiscus.

It has been stated that the first cotton was spun in Northern Sind, now a part of Western Pakistan, and that the manufacture of cotton yarn and cloth in Sind coincided with a more or less simultaneous discovery of the use of silk in China about 2640 B.C. At Mohenjo-daro, in Upper Sind, pieces of cloth have been found, and it has been established that they were made there between 3000 and 2750 B.C.

However, the early Sind cottons were of very short staple, which could produce only a coarse, rough yarn and a coarse cloth. It was not until 1864 that attempts to improve the strain of Sind cotton were made, with the introduction of new varieties of cotton seed from the Middle East and the New World.

Lack of water prevented any progress in the development of a longer, silkier staple for many years. In 1932, however, the opening of the Lloyd Barrage at Sukkur, watering over 35,000 miles of main waterways canals and subsidiary irrigation courses, made possible the present large improved Sind and Punjab crops.

The principal staple cotton varieties now grown are the 4F, LSS, and 289F of West Punjab and the NT/289F, 98F and the rough short-staple Sind Desi, with M4 and Sind NT staple lengths of from half an inch to seven-eighths and frequently one inch. In the past few years, cotton botanists in Sind have developed a hybrid strain from Sind-American types which averages one and one-eighth inches in length. This strain is expected to be grown in commercial quantities by 1950 or 1951. At that time it should considerably augment Pakistan's foreign exchange earnings in the world's cotton markets, now estimated at the equivalent of \$135 million (Canadian) annually. India is the principal market for Pakistan cotton, taking 65 per cent of the crop, but an increasing market is developing in the Far East, Europe and Australia as the dollar balances of these countries continue unfavourable, and Soviet Russia took very large quantities from Karachi in the past year.

There is little machinery with which to manufacture a finished product from Pakistan's cotton, only twelve spinning mills operating in the whole country last year. These had 166,700 spindles, yarn output being on low counts only. The exact number of weaving factories is not available, since many of these are very small, housing only a few power looms and in some cases comprising a few systems of organized hand-loom production, totaling 4,315. Cloth production, at double shifts, is not more than 5,000 bales per month, only about 10 per cent of Pakistan's requirements. Since the country's annual minimum cotton-cloth requirements are 600,000 yards, the highest priority is given to the setting up of cotton textile mills, both for spinning and weaving, in East and West Pakistan.

Imports Expected to Provide Temporary Relief

Imports from Russia, Czechoslovakia and Japan are expected to bring temporary relief from the present cloth shortages in Pakistan. Agreements in this regard were discussed with these countries during mid-1948. It is

proposed to increase spinning capacity fourteen-fold by the installation of spinning and weaving mills, a target of 1,000,000 spindles being indicated for 1953 and a total of 2,500,000 by 1958.

The cotton, when picked from the plant, carries with it the cotton seed. From the fields it goes to the cotton gins, where the lint is separated from the seed and the cotton baled for transportation, in very much the same way as jute, in steel-hooped, hydraulically pressed bales of 400 pounds each.

The growing, ginning, baling and marketing of cotton is a complicated system and one which, in Western Pakistan, was seriously upset during the disturbances following partition. Most of the firms operating the ginning factories, many of whom were Hindu, also bought cotton direct from the growers or otherwise financed the growers' costs. As a result of the Punjab upheaval, large numbers of these essential links in the marketing chain for cotton of both the Punjab and Sind (though to a lesser extent in the latter area) left for India, abandoning their ginning factories and other cotton preparation and distributive enterprises.

Although this gap in the handling of Western Pakistan's most important commercial crop became serious toward the end of 1947, it was eventually filled by concerted efforts of the Karachi cotton trade, assisted by special Central Government financing measures. By the end of October, 1948, when the old crop was on market and picking of the new crop was starting (the cotton year runs from September 1 to August 31), the figures for despatch of bales from Karachi were not far different from those of the previous year, allowance being made for approximately 250,000 bales from the East Punjab (India) which, after partition, would no longer be shipped through Karachi. However, there was unusually heavy movement of cotton to Karachi from June to December, 1947. This suggested a clearing of all up-country stocks and the marked shrinkage of the usual carryover stocks in Karachi. For this reason the figures for the year ending September, 1948, probably conceal a virtual fall in production and shipment of as much as 20 per cent.

An export duty of Rs.60 (Can.\$18.15 approx.) is levied on each bale of 400 pounds. At the end of October, 1948, Karachi prices for Punjab 289F sawgin, at Rs.485, represents a duty of about 12 per cent.

Wool is One of the Leading Exports of Western Pakistan

Although the quality of most Pakistan wools is not of the highest, the wool fibre being short and coarse when compared with the merino, the quantity of wool produced is considerable, and it ranks among the leading exports of Western Pakistan. The greater part of the wool crop is raised in Western Pakistan, where the West Punjab is the biggest producer.

The sheep population is estimated to be distributed approximately 45 per cent in the West Punjab, 14 per cent in North West Frontier Provinces, 24 per cent in Baluchistan and the remaining 16 per cent in Sind. The wool clip per sheep varies with the breed and district, ranging from 5.5 pounds in Baluchistan to 3.5 pounds in the North West Frontier Provinces, down to 2 pounds in the less rigorous districts of West Punjab and Sind.

More than 60 per cent of the wool production is exported. The export value of this wool, based on an average price at an up-country market, such as Peshawar, of Rs.71.5 per cwt., is therefore the equivalent of about \$6 million. Other grades of wool bring higher prices according to their type and the market demand.

The types of wool most frequently quoted on the Multan market and at Karachi are Khandhar, Fazilka, Sind and Bikaner, each of these being further described and valued according to colour, either white or yellow.

Wool is shipped from Karachi in bales of 336 pounds gross, the principal importing countries being the United States, United Kingdom, India, the Netherlands, Germany and Canada. About 20 per cent of the annual total volume of wool exports from Karachi is from Afghanistan and Central Asia.

There is no power-operated woollen spinning or weaving industry in Pakistan, with the exception of one small plant, employing less than 200 workers, in East Bengal. With electrification of Western Pakistan, some impetus is expected to be given the development of a woollen industry

At the same time, however, there is a cottage industry based on hand-loom production, the chief use of local wool, being for the weaving of coarser fabrics such as blankets, tweeds, carpets, rugs and woollen hosiery. The finer worsteds cannot be spun from local wool and must be imported.

Kashmir shawl wool or "pashm", the silky under-fleece of a particular breed of goat, is superior to any other wool. Prior to the recent dispute over Kashmir, small quantities of this fine wool were shipped through Karachi. Breeding of this species of goat in the more mountainous districts of the frontier province of Baluchistan is quite possible.

United States Promoting Overseas Lumber Sales

Washington, April 19, 1949.—Substantial quantities of lumber are available for export from the United States, according to the Department of Commerce. Domestic lumber supplies are greatly improved and, with the exception of Port Orford cedar products, logs, lumber, plywood, veneer and flooring are free from export controls. It is reported that exporters are actively engaged in promoting overseas sales.

British Exports and Imports at Record Levels in March

London, April 27, 1949.—(FTS)—British exports during March rose to a peak of £160,000,000, but imports also rose to a new record high at just short of £190,000,000. Allowing for re-exports, the visible adverse balance of trade was £24,000,000, compared with £17,000,000 in February, and with £23,000,000 in January.

Export results are estimated to be slightly below January, which contained one less working day. February was a short month. Textiles stood out among commodity groups, exports increasing from £32,000,000 in January to nearly £35,000,000 in March. Cotton goods alone increased from £13,800,000 to £15,900,000. Other products improving over their January performance were pottery and glassware.

Offsetting these gains, nearly all engineering materials and chemicals showed declines compared with January. Machinery exports were down by £1,800,000 to £23,900,000. Electrical equipment and chemicals showed smaller reductions.

In the vehicle group, which includes ships, exports were on a slightly lower level than in January. Shipments of automobiles and commercial vehicles exceeded the January totals but agricultural tractors and ships declined.

As regards imports, which were £2,600,000 higher than in January, the principal features were a contraction of £10,600,000 in arrivals of food, particularly grain, and a noticeable rise of £7,300,000 in imports of raw materials. Raw materials showing the biggest increases were cotton, £4,500,000; non-ferrous metals, £1,900,000; and oils and oilseeds, £3,300,000.

Provision Made for Additional Purchases By Great Britain During Current Year

Canadian apples, canned salmon, flour, fruit pulp and timber mentioned by Minister of Trade and Commerce as items for which purchases arranged during recent visit to London.

PROVISION was made for the purchase by Great Britain of Canadian apples, canned salmon, flour, fruit pulp and timber, during the recent visit to that country of the Right Hon. C. D. Howe, Minister of Trade and Commerce, who was accompanied by M. W. Mackenzie, Deputy Minister. The minister stated: "During my visit to the United Kingdom, the purpose of which was to take part in the opening of the British Industries Fair, I discussed with United Kingdom authorities a number of trade matters of immediate concern to Canada.

"I found on all sides a desire on the part of Great Britain to purchase Canadian products. The difficulty is to find the means of payment. Any real solution toward providing the means for greater purchases in Canada must depend on greater purchases of British goods by dollar countries. I have assured the British Government that we in Canada will lend every effort in support of the vigorous export drive now being undertaken by the United Kingdom.

"Despite its serious dollar difficulties, Great Britain is planning additional purchases, provided agreement can be reached on prices. I have informed United Kingdom authorities that there need be no doubt of the ability of Canadian suppliers to meet competition from any part of the world."

Great Britain has undertaken to make a "token" purchase of Canadian apples, the details of which are yet to be established.

Between 300,000 and 400,000 cases of canned salmon will be purchased by the United Kingdom before the end of 1949. A representative of the United Kingdom Ministry of Food will come to Canada to negotiate the purchase.

Great Britain has undertaken to buy some 400,000 tons of flour from Canada during the 1949-50 crop year. This represents 100,000 tons above the minimum amount for which provision was made in the Canada-United Kingdom Wheat Agreement.

The United Kingdom has offered to buy a small quantity of fruit pulp now held by the Canadian Government.

Provision has been made for the purchase of some \$10,000,000 worth of timber from Canada and the United States, contracts to be awarded on the basis of commercial considerations. The amounts are over and above those of West Coast lumber to be obtained by the United Kingdom in the last half of 1949.

British Imports of Canadian Apples, Flour, Canned Salmon and Lumber

	1938	1947	1948
		Cwts.	
Apples	3,006,589	663,145	.....
Canned salmon	155,679	208,060	56,314*
Flour	3,652,616	13,216,762	12,722,429
		Cubic feet	
Sawn hardwood	6,108,000	6,041,000	3,152,000
Plywood	365,999	2,876,836	1,690,883
		Standards	
Sawn softwood	289,847	452,353	238,739
Dressed softwood	110,757	41,665	21,202
Boxboards	268	5,031	5,103
Sleepers	29,282	58,392	47,880

* Represents shipments from the 1947 pack.

Canadian Exports, by Commodities

Commodity	March			January—March		
	1938	1948	1949	1938	1948	1949
MAIN GROUPS						
(Millions of Dollars)						
Agricultural, Vegetable Products.....	13.1	45.3	47.6	42.5	138.4	155.6
Animals and Animal Products.....	10.0	32.3	20.5	30.5	102.4	68.5
Fibres, Textiles and Products.....	1.2	3.0	2.3	2.9	9.1	7.6
Wood, Wood Products and Paper.....	18.2	78.1	69.7	46.5	217.6	199.2
Iron and Products.....	7.0	21.2	27.5	18.6	60.6	74.2
Non-Ferrous Metals and Products.....	17.7	29.9	32.9	47.4	89.5	100.1
Non-Metallic Minerals, Products.....	1.9	6.4	4.4	5.0	17.4	16.4
Chemicals and Allied Products.....	2.3	6.2	7.4	5.3	19.2	19.6
Miscellaneous Commodities.....	2.0	6.0	4.5	4.6	17.8	17.5
TOTAL DOMESTIC EXPORTS.....	73.3	228.4	216.8	203.2	672.0	658.8
(Thousands of Dollars)						
Agricultural, Vegetable Products:						
Fruits.....	462	289	498	2,605	993	2,799
Vegetables.....	205	783	422	563	2,718	1,373
Wheat.....	4,452	17,450	21,629	17,065	50,527	74,611
Grains, other.....	744	2,699	1,912	2,447	13,024	6,157
Flour of wheat.....	1,771	10,795	7,510	5,029	29,556	25,126
Farinaceous products, other.....	995	2,090	1,177	2,732	5,364	2,794
Sugar and products.....	215	183	174	320	566	502
Alcoholic beverages.....	985	1,886	3,395	2,743	6,455	8,549
Vegetable fats and oils.....	5	1,029	710	31	2,302	2,900
Rubber and products.....	1,361	2,980	2,415	3,385	8,109	6,604
Seeds.....	275	2,287	5,272	943	11,361	15,803
Tobacco.....	1,374	1,362	1,140	3,999	3,530	4,710
Vegetable products, other.....	215	1,489	1,340	646	3,858	3,682
TOTAL.....	13,059	45,321	47,595	42,508	138,363	155,609
Animals and Animal Products:						
Cattle.....	1,069	1,681	3,745	2,057	4,156	8,606
Other animals, living.....	147	692	702	379	1,885	1,765
Fish and fishery products.....	2,516	5,606	6,337	6,834	23,792	17,614
Furs and products.....	1,415	1,913	2,137	7,093	7,999	8,577
Leather and products.....	464	1,287	575	1,232	4,423	1,777
Bacon and hams.....	2,837	10,348	1,197	8,617	24,217	5,803
Meats, other.....	429	3,870	2,588	1,267	14,542	9,402
Cheese.....	146	113	15	280	1,507	55
Milk products, other.....	226	642	680	720	2,095	2,929
Eggs, shell and processed.....	7	4,336	247	35	12,648	5,387
Animal products, other.....	726	1,801	2,251	1,960	5,090	6,536
TOTAL.....	9,982	32,238	20,475	30,475	102,354	68,450
Fibres, Textiles and Products:						
Cotton products.....	271	646	799	669	2,226	2,028
Flax, hemp and jute products.....	15	133	245	29	383	559
Wool and products.....	115	530	493	336	1,495	1,420
Artificial silk and products.....	208	690	187	542	2,177	452
Textile products, other.....	550	1,042	588	1,346	2,811	3,167
TOTAL.....	1,159	3,042	2,312	2,922	9,092	7,625
Wood, Wood Products and Paper:						
Planks and boards.....	3,130	15,350	11,066	7,917	47,721	32,364
Pulpwood.....	424	2,906	2,994	1,654	8,371	9,118
Unmanufactured wood, other.....	1,898	6,411	3,879	4,613	18,602	10,448
Wood pulp.....	2,899	18,087	15,640	7,440	48,100	46,228
Manufactured wood, other.....	323	523	374	874	1,561	1,163
Newsprint paper.....	8,685	31,955	33,733	21,467	84,760	94,027
Paper, other.....	765	2,569	1,622	2,384	7,534	4,953
Books and printed matter.....	77	310	346	199	978	933
TOTAL.....	18,202	78,110	69,655	46,547	217,627	199,236

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

Canadian Exports, by Commodities—Concluded

Commodity	March			January—March		
	1938	1948	1949	1938	1948	1949
(Thousands of Dollars)						
Iron and Products:						
Iron ore.....			10			41
Ferro-alloys.....	82	1,892	1,861	355	5,559	6,409
Pigs, ingots, blooms, billets.....	642	53	331	1,521	313	716
Rolling mill products.....	293	1,328	1,024	727	4,281	3,170
Locomotives and parts.....	9	194	2,907	10	1,747	7,466
Farm machinery and implements.....	902	6,188	11,877	2,546	17,058	27,791
Hardware and cutlery.....	142	433	283	516	1,268	1,073
Machinery (except farm).....	1,085	4,050	2,832	2,777	11,267	7,542
Automobiles, freight.....	853	1,890	355	2,664	3,230	2,008
Automobiles, passenger.....	2,054	1,305	640	5,002	4,580	3,895
Automobile parts.....	396	1,282	877	1,004	4,119	2,602
Railway cars and parts.....		82	1,974	9	95	4,450
Iron products, other.....	559	2,503	2,541	1,460	7,089	7,070
TOTAL.....	7,017	21,205	27,512	18,589	60,605	74,233
Non-Ferrous Metals and Products:						
Aluminium and products.....	1,824	7,154	6,214	5,275	23,491	16,838
Brass and products.....	91	564	402	248	1,590	808
Copper and products.....	5,104	5,726	6,629	12,200	19,236	19,712
Lead and products.....	673	2,854	2,044	2,184	6,438	10,396
Nickel.....	6,179	5,731	8,172	17,232	18,970	23,790
Precious metals, except gold.....	1,731	1,961	1,909	5,021	6,377	7,500
Zinc and products.....	1,206	3,302	5,366	3,214	6,568	14,918
Electrical apparatus, n.o.p.....	494	1,486	1,347	1,142	4,119	3,624
Non-ferrous, products, other.....	443	1,109	843	841	2,748	2,467
TOTAL.....	17,744	29,887	32,927	47,357	89,537	100,053
Non-Metallic Minerals, Products:						
Asbestos and products.....	797	3,198	884	2,026	8,597	5,928
Coal.....	123	507	250	460	1,474	1,081
Petroleum and products.....	83	488	299	118	1,559	1,432
Abrasives, artificial, crude.....	468	1,097	1,378	1,250	2,835	3,418
Non-metallic products, other.....	395	1,065	1,564	1,097	2,959	4,576
TOTAL.....	1,865	6,356	4,375	4,950	17,425	16,435
Chemicals and Allied Products:						
Acids.....	148	415	198	322	1,215	744
Medicinal preparations.....	140	350	190	318	1,100	441
Fertilizers.....	1,279	2,623	4,679	2,527	8,858	11,621
Paints and varnishes.....	70	635	351	231	1,520	1,035
Calcium compounds.....	53	232	177	136	712	663
Soda and sodium compounds.....	418	404	354	992	1,007	1,015
Chemical products, other.....	153	1,532	1,440	733	4,822	4,117
TOTAL.....	2,262	6,190	7,387	5,259	19,234	19,637
Miscellaneous Commodities:						
Toys and sporting goods.....	18	78	44	40	174	81
Films.....	399	301	166	960	929	587
Ships and vessels.....	43	1,300	72	93	4,762	3,171
Aircraft and parts.....	628	1,358	545	731	3,285	1,302
Electrical energy.....	298	331	470	1,076	1,061	1,283
Miscellaneous consumer goods.....	143	608	560	475	1,320	1,127
Miscellaneous.....	328	651	1,274	781	2,055	4,540
Donations and gifts.....		616	716		2,034	3,036
Non-commercial articles.....	180	727	703	484	2,165	2,407
TOTAL.....	2,039	5,969	4,549	4,640	17,786	17,533

Canadian Railway Revenue Freight Higher Last Year

Cumulative totals of revenue freight carried by Canadian railways during 1948 reached 154,732,409 tons compared with 152,705,372 tons in 1947, a gain of 2,027,037 tons, or 1.3 per cent. The volume originated in 1948 was the second highest on record, second only to the 1944 total of 154,845,277 tons.—(Dominion Bureau of Statistics)

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

Brantford—Board of Trade.

Calgary—Board of Trade.

Charlottetown—Board of Trade.

Edmonton—Canadian Manufacturers' Association.

Fredericton—Chamber of Commerce.

Galt—Board of Trade.

Halifax—Board of Trade.

Hamilton—Chamber of Commerce.

Kingston—Chamber of Commerce.

Kitchener—Chamber of Commerce.

London—Chamber of Commerce.

Moncton—Board of Trade.

Montreal—Montreal Board of Trade.

Niagara Falls—Chamber of Commerce.

Quebec City—Board of Trade.

Regina—Chamber of Commerce.

Saint John—Board of Trade.

Sarnia—Chamber of Commerce.

Saskatoon—Board of Trade.

Sherbrooke—Chamber of Commerce.

St. Catharines—Chamber of Commerce.

Toronto—Canadian Manufacturers' Association.

Vancouver—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.

Douglas S. Cole Returns from Mexico City



Douglas S. Cole

Douglas S. Cole, Commercial Counsellor for Canada in Mexico City, has returned home on leave, and will tour this country during the present summer, discussing with businessmen conditions in Mexico and opportunities for the further development of trade between that country and Canada. He will be in Montreal from May 18 to 27. Mr. Cole was born in Ottawa in 1893, and was educated there and at McGill University, from which he graduated in 1915 with a B.Sc. degree in chemical engineering. Joining the Canadian Trade Commissioner Service in 1921, Mr. Cole was posted to Glasgow the following year as acting trade commissioner. He was trade commissioner for the West of England, the Midlands and Wales from 1922 to 1934, when he was transferred to New York. Mr. Cole was

acting director of the Commercial Relations and Foreign Tariffs Division, Department of Trade and Commerce, in 1944, and the next year he was posted to Mexico City as commercial counsellor at the Canadian Embassy, serving from time to time as charge d'affaires.

Montreal—May 18-27.

C. Blair Birkett, Canadian Government Trade Commissioner in Guatemala since 1946, has returned home on leave before proceeding to

another post. He is making a tour of Canada, discussing trade conditions in Costa Rica, El Salvador, Guatemala, Honduras and Nicaragua with businessmen interested in that territory.

Toronto—June 6-11.
Hamilton—June 13.
Kitchener—June 14.

Winnipeg—June 16.
Vancouver—June 20-25.
Ottawa—June 30.

R. E. Gravel, Assistant Commercial Secretary for Canada in Buenos Aires, Argentina, has returned home on leave before proceeding to another post. He will tour Canada, discussing trade conditions in Argentina, Uruguay and Paraguay with businessmen interested in that territory.

Montreal—May 11-23.
Kingston—May 25.
Batawa—May 26.
Toronto—May 27-June 7.
Hamilton—June 8.
St. Catharines—June 9.
Welland—June 10.
Niagara Falls—June 11.
Brantford—June 13.

London—June 14.
Windsor-Walkerville—June 15.
Sarnia—June 16.
Kitchener—June 17-18.
Galt-Preston—June 20.
Winnipeg—June 23.
Vancouver-Victoria—June 27-July 2.
Ottawa—July 14-16.

Trade and Tariff Regulations

Pear Imports into Canada from any Country Authorized

Effective May 2, 1949, until otherwise determined, the importation of pears into Canada from any country is authorized under open general permit.

Cuba Removes Flour from Price Control

Havana, April 27, 1949.—(FTS)—Effective April 25, 1949, wheat flour has been removed from price control in Cuba.

Importation of Carrots Authorized

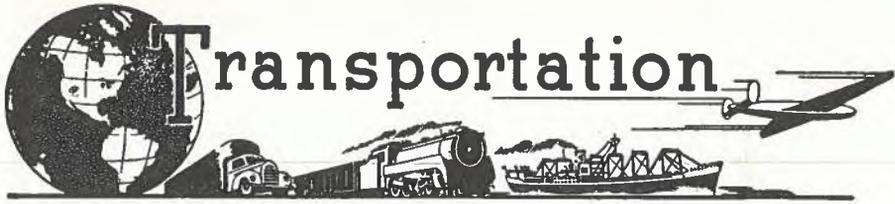
Effective May 11, 1949, until otherwise determined, the importation of carrots without tops (ex item 87) into the provinces of Alberta, Saskatchewan and Manitoba from any country is authorized under open General Permit No. 122.

Hanover Trade Fair Being Held This Month

Frankfurt, April 20, 1949.—The second part of the Hanover Export Trade Fair will be held from May 20-30, and consists of technical products and industrial equipment. A quota system has been established, in order to ensure that adequate accommodation and transportation facilities may be available, the number allocated to Canada being twenty. Requests for additional admissions will be favourably considered. Military entry permits will be required for each visitor.

Payment for accommodation, food and other services will be in Deutschemarks, which will be provided in exchange for travellers' cheques or other instruments expressed in dollars at any authorized German bank. Accommodation will range from DM 5 to DM 12 per night, without breakfast, and meals from DM 5 to DM 12. Ration cards may be obtained on arrival in Hanover.

(Editor's Note—Military entry permits and other information may be obtained from the Canadian Trade Commissioner Service, Department of Trade and Commerce, Ottawa.)



Ocean-Going Sailing Schedules

Information contained in the following list of sailings is furnished by the 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. Exporters should seek further details from the operator or agent mentioned.

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

Departures from Montreal

* Calls at Halifax about four days later.

† Calls at Quebec about two days later.

(r) Indicates refrigerated cargo space.

Destination	Loading Date	Vessel	Operator or Agent
Aden			
Port Aden.....	June 1-6	<i>Sommelsdijk</i>	Cunard Donaldson
Port Aden.....	June 27-July 2	<i>Bengkalis</i>	Cunard Donaldson
Africa-East			
Lourenço Marques..	(May 20-25 May 22-27 May 25 June 1-10 June 5-10 June 15-25 June 20-25 June 25	<i>Inverness County</i> <i>Biafra</i> <i>Catrine</i> <i>A Ship</i> <i>A Ship</i> <i>Cabano</i> <i>A Ship</i> <i>Constantia</i>	March Shipping Elder Dempster Shipping Limited Elder Dempster March Shipping Elder Dempster March Shipping Shipping Limited
Lourenço Marques..	May 18-25	<i>Thorshall</i>	Kerr Steamships
Beira.....	June 25	<i>Thorsisle</i>	Kerr Steamships
Mombasa.....			
Africa-South—			
Cape Town.....	(May 18-25 May 22-27 May 20-25 June 1-10 June 15-25 June 25 June 25	<i>Catrine</i> <i>Biafra</i> <i>Digby County</i> <i>A Ship</i> <i>Cabano</i> <i>Constantia</i> <i>Thorsisle</i>	Shipping Limited Elder Dempster March Shipping Elder Dempster Elder Dempster Shipping Limited Kerr Steamships
Cape Town.....	May 20-25	<i>Inverness County</i>	March Shipping
Port Elizabeth.....	June 5-10	<i>A Ship</i>	March Shipping
Durban.....	June 20-25	<i>A Ship</i>	March Shipping
Argentina—			
Buenos Aires.....	(May 31-June 4 June 6-7 June 13-16	<i>Bowgran</i> <i>Mormactide</i> † <i>Brazilian Prince</i>	Cunard Donaldson Montreal Shipping Furness Withy
Australia—			
Brisbane.....	July 2	<i>Ashburton</i>	Montreal Australia New Zealand Line
Sydney.....			
Hobart.....			
Freemantle.....			
Melbourne.....			
Adelaide.....			

Departures from Montreal—Continued

Destination	Loading Date	Vessel	Operator or Agent	
Belgium— Antwerp.....	May 20-27	<i>Vasaholm</i>	Swedish American	
	May 23-30	<i>Beaconsfield</i>	Cunard Donaldson	
	May 25-30	<i>Rouen</i>	Furness Withy	
	May 27-June 3	<i>Mont Alta</i>	Montreal Shipping	
	May 31	<i>Grey County</i>	Canada Steamships	
	May 31	<i>Prins Willem Van Oranje</i>	Shipping Limited	
	June 10	<i>Prins Willem V</i>	Shipping Limited	
	June 15	† <i>Beaverdell</i> (r)	Canadian Pacific	
	June 17-23	<i>Tunaholm</i>	Swedish American	
	June 20-25	<i>Sein</i>	Furness Withy	
	June 26-July 3	<i>Beaconsfield</i>	Cunard Donaldson	
Brazil— Rio de Janeiro.....	May 31-June 4	<i>Bowgran</i>	Cunard Donaldson	
Santos.....	June 6-7	<i>Mormactide</i>	Montreal Shipping	
	June 13-16	† <i>Brazilian Prince</i>	Furness Withy	
Ceylon— Colombo.....	May 15-25	<i>Derwenthall</i>	McLean Kennedy	
Colombia— Barranquilla.....	May 26-30	* <i>Polykarp</i>	Swedish American	
Cuba— Havana.....	May 27-28	<i>A Ship</i>	Saguenay Terminals	
	June 10-15	* <i>Stegeholm</i>	Swedish American	
Denmark— Copenhagen.....	May 20-27	<i>Vasaholm</i>	Swedish American	
	June 2	<i>Oris</i>	Brock Shipping	
	June 3-5	<i>Erland</i>	Swedish American	
	June 4-7	<i>Helgasmith</i>	Montreal Shipping	
	June 10-15	<i>Erik Banck</i>	Swedish American	
	June 17-23	<i>Tunaholm</i>	Swedish American	
Egypt— Alexandria.....	June 1-6	<i>Sommelsdijk</i>	Cunard Donaldson	
	Port Said.....	<i>Bengkalis</i>	Cunard Donaldson	
	Suez.....			
Finland— Helsinki.....	May 20-27	<i>Vasaholm</i>	Swedish American	
	June 3-5	<i>Erland</i>	Swedish American	
	June 10-15	<i>Erik Banck</i>	Swedish American	
	June 17-23	<i>Tunaholm</i>	Swedish American	
France— Le Havre.....	May 25-30	<i>Rouen</i>	Furness Withy	
	May 20-27	<i>Vasaholm</i>	Swedish American	
	May 31	<i>Grey County</i>	Canada Steamships	
	May 31	<i>Prins Willem Van Oranje</i>	Shipping Limited	
	June 10	<i>Prins Willem V</i>	Shipping Limited	
	June 17-23	<i>Tunaholm</i>	Swedish American	
	June 20-25	<i>Sein</i>	Furness Withy	
Marseilles.....	May 20-25	<i>Capo Arma</i>	Furness Withy	
Germany— Hamburg.....	May 20-27	<i>Vasaholm</i>	Swedish American	
	May 23-30	<i>Beaconsfield</i>	Cunard Donaldson	
	May 27-June 3	<i>Mont Alta</i>	Montreal Shipping	
	May 31	<i>Prins Willem Van Oranje</i>	Shipping Limited	
	June 10	<i>Prins Willem V</i>	Shipping Limited	
	June 17-23	<i>Tunaholm</i>	Swedish American	
	June 26-July 3	<i>Beckenham</i>	Cunard Donaldson	
Greece— Piraeus.....	June 15	<i>A Ship</i>	Monsen Clarke	
India and Pakistan— Bombay.....	May 15-25	<i>Derwenthall</i>	McLean Kennedy	
				Karachi.....
				Madras.....
				Calcutta.....

Departures from Montreal—Continued

Destination	Loading Date	Vessel	Operator or Agent
Indonesia—			
Batavia.....			
Samarang.....	June 1-6	<i>Sommelsdijk</i>	Cunard Donaldson
Soerabaya.....	June 27-July 2	<i>Bengkalis</i>	Cunard Donaldson
Cheribon.....			
Belawan-Deli.....			
Ireland—			
Dublin.....	May 29-June 3	<i>Lord Glentoran</i>	McLean Kennedy
Dublin.....	May 25	<i>A Ship</i>	Shipping Limited
Cork.....			
Italy—			
West Coast Ports...	May 20-25	<i>Capo Arma</i>	Furness Withy
Genoa.....	June 15	<i>A Ship</i>	Monsen Clarke
Malaya—			
Penang.....	June 1-6	<i>Sommelsdijk</i>	Cunard Donaldson
Port Swettenham...	June 27-July 2	<i>Bengkalis</i>	Cunard Donaldson
Mediterranean—			
Central and Western Areas.....	May 28-June 3	<i>Maria Theresa G.</i>	Montreal Shipping
Mexico—			
Tampico.....	June 10-15	* <i>Stegholm</i>	Swedish American
Veraacruz.....			
Netherlands—			
Amsterdam.....	May 20-27	<i>Vasaholm</i>	Swedish American
Rotterdam.....	May 23-30	<i>Beaconsfield</i>	Cunard Donaldson
	May 31	<i>Prins Willem Van Oranje</i>	Shipping Limited
	May 31	<i>Grey County</i>	Canada Steamships
	June 10	<i>Prins Willem V</i>	Shipping Limited
	June 17-23	<i>Tunaholm</i>	Swedish American
	June 26-July 3	<i>Beckenham</i>	Cunard Donaldson
Rotterdam.....	May 27-June 3	<i>Mont Alla</i>	Montreal Shipping
Netherlands Antilles—			
Willhelmstad.....	May 26-30	* <i>Polykarp</i>	Swedish American
New Zealand—			
Auckland.....	May 21-27	<i>Ottawa Valley</i>	Montreal Australia
Wellington.....	July 9	<i>Port Albany</i>	New Zealand Line
Lyttleton.....			Montreal Australia
Dunedin.....			New Zealand Line
Northern Ireland—			
Belfast.....	May 25	<i>Ramore Head</i>	McLean Kennedy
Norway—			
Oslo.....	May 20-27	<i>Vasaholm</i>	Swedish American
Kristiansand.....	May 27-June 1	<i>Topdalsfjord</i>	Kerr Steamships
Stavanger.....	June 3-5	<i>Erland</i>	Swedish American
Bergen.....	June 10-15	<i>Erik Banck</i>	Swedish American
	June 17-23	<i>Tunaholm</i>	Swedish American
Trondheim.....	May 27-June 1	<i>Topdalsfjord</i>	Brock Shipping
Bergen.....	June 2	<i>Orin</i>	Brock Shipping
Oslo.....			
Stavanger.....			
Palestine—			
Tel-Aviv.....	May 25	<i>A Ship</i>	Shipping Limited
Haifa.....			
Poland—			
Gdynia.....	May 20-27	<i>Vasaholm</i>	Swedish American
Gdansk.....	May 26-28	<i>Erland</i>	Swedish American
	June 7-11	<i>Erik Banck</i>	Swedish American
	June 17-23	<i>Tunaholm</i>	Swedish American

Departures from Montreal—Continued

Destination	Loading Date	Vessel	Operator or Agent
Portugal— Lisbon.....	May 28–June 3	<i>Maria Theresa G.</i>	Montreal Shipping
Puerto Rico— San Juan.....	May 26–30	* <i>Polykarp</i>	Swedish American
Singapore.....	{ June 1–6 June 27–July 2	<i>Sommelsdijk</i> <i>Bengkalis</i>	Cunard Donaldson Cunard Donaldson
Sweden— Gothenburg.....	{ May 20–27 June 3–5	<i>Vasaholm</i> <i>Erland</i>	Swedish American Swedish American
Norrkoping.....	{ June 4–7	<i>Helgasmith</i>	Montreal Shipping
Stockholm.....	{ June 10–15 June 17–23	<i>Erik Banck</i> <i>Tunaholm</i>	Swedish American Swedish American
Trieste.....	June 15	<i>A Ship</i>	Monsen Clarke
United Kingdom— Avonmouth.....	{ May 20–26 May 28–June 24 June 22–29	<i>Moveria</i> (r) <i>Delilian</i> (r) <i>Dorelian</i> (r)	Cunard Donaldson Cunard Donaldson Cunard Donaldson
Avonmouth.....	{ May 21–26	<i>Montreal City</i>	Furness Withy
Swansea.....	{ June 17–22	<i>Egidia</i>	Furness Withy
Glasgow.....	{ May 22–29 June 5–13 June 19–26 June 26–July 4	<i>Laurentia</i> (r) <i>Lismoria</i> (r) <i>Salacia</i> (r) <i>Laurentia</i> (r)	Cunard Donaldson Cunard Donaldson Cunard Donaldson Cunard Donaldson
Liverpool.....	{ May 20–26 May 27 May 28–June 3 May 29–June 3 June 3 June 13–20 June 16 June 16–20 June 17 June 24–30	<i>Valacia</i> (r) <i>Empress of Canada</i> (r) <i>Sibley Park</i> <i>Lord Glentoran</i> <i>Empress of France</i> (r) <i>Arabia</i> (r) <i>Beaverford</i> <i>Ascania</i> (r) <i>Empress of Canada</i> (r) <i>Fort Cadotte</i>	Cunard Donaldson Canadian Pacific Cunard Donaldson McLean Kennedy Canadian Pacific Cunard Donaldson Canadian Pacific Cunard Donaldson Canadian Pacific Cunard Donaldson
London.....	{ May 29 June 1–6 June 9–16 June 10–15 June 15 June 17–24 June 22	† <i>Beaverlake</i> (r) <i>Seaboard Trader</i> <i>Asia</i> (r) <i>Seaboard Queen</i> † <i>Beaverdell</i> (r) <i>Fort Musquarro</i> <i>Beaverglen</i> (r)	Canadian Pacific March Shipping Cunard Donaldson March Shipping Canadian Pacific Cunard Donaldson Canadian Pacific
Manchester.....	{ May 25–28 June 1–4 June 8–11	<i>Manchester Regiment</i> (r) † <i>Manchester Progress</i> (r) † <i>Manchester Shipper</i> (r)	Furness Withy Furness Withy Furness Withy
Leith.....	{ June 1–6	<i>Cairnvalona</i>	Furness Withy
Newcastle.....	{ June 14–20	<i>Cairnavon</i>	Furness Withy
Uruguay— Montevideo.....	{ May 31–June 4 June 6–7 June 13–16	<i>Bowgran</i> <i>Mornactide</i> † <i>Brazilian Prince</i>	Cunard Donaldson Montreal Shipping Furness Withy
Vancouver—	{ May 25–30 June 25–30	<i>A Ship</i> <i>A Ship</i>	March Shipping March Shipping
Venezuela— Puerto Cabello.....	{ May 26–30	* <i>Polykarp</i>	Swedish American
La Guaira.....			
Maracaibo.....			

Departures from Montreal—Concluded

Destination	Loading Date	Vessel	Operator or Agent
West Indies—			
Antigua.....	May 17-26 May 20-27 May 31-June 9 June 2-10 June 14-23 June 28-July 7	* <i>Alcoa Pioneer</i> <i>Lady Rodney</i> (r) * <i>Alcoa Patriot</i> <i>Canadian Constructor</i> (r) * <i>A Ship</i> * <i>A Ship</i>	Alcoa Steamships Canadian National Alcoa Steamships Canadian National Alcoa Steamships Alcoa Steamships
Barbados.....			
Bermuda.....			
Bermuda.....			
British Guiana.....			
Dominica.....			
Grenada.....			
Montserrat.....			
St. Kitts.....			
St. Lucia.....			
St. Vincent.....			
Trinidad.....			

Departures from Quebec

*Calls at Montreal a few days later.
(r) Indicates refrigerated cargo space.

Destination	Loading Date	Vessel	Operator or Agent
British Honduras—			
Belize.....	May 28-30	* <i>Benny</i> (r)	Saguenay Terminals
Canal Zone—			
Cristobal.....	May 28-30	* <i>Benny</i> (r)	Saguenay Terminals
Colombia—			
Barranquilla.....	May 28-30	* <i>Benny</i> (r)	Saguenay Terminals
Costa Rica—			
Port Limon.....	May 28-30	* <i>Benny</i> (r)	Saguenay Terminals
Cuba—			
Havana.....	May 28-30	* <i>Benny</i> (r)	Saguenay Terminals
Dominican Republic—			
Ciudad Trujillo.....	May 27-28	* <i>Askepot</i>	Saguenay Terminals
Ciudad Trujillo.....	June 7-8	* <i>Congo</i>	Saguenay Terminals
Guatemala—			
Puerto Barrios.....	May 28-30	* <i>Benny</i> (r)	Saguenay Terminals
Haiti—			
Port au Prince.....	June 7-8	* <i>Congo</i>	Saguenay Terminals
Netherlands—			
Amsterdam.....	May 18-19 June 1-2	<i>Kota Inten</i> <i>Tabinta</i>	Furness Withy Furness Withy
Rotterdam.....			
Netherlands Antilles—			
Curaçao.....	June 7-8	* <i>Congo</i>	Saguenay Terminals
United Kingdom—			
Greenock.....	June 8-12	<i>Franconia</i> (r)	Cunard Donaldson
Liverpool.....			
Liverpool.....	July 8	<i>Franconia</i> (r)	Cunard Donaldson
London.....	June 5-9	<i>Samaria</i> (r)	Cunard Donaldson
London.....	June 19-23	<i>Scythia</i> (r)	Cunard Donaldson
Venezuela—			
La Guaira.....	May 27-28	* <i>Askepot</i>	Saguenay Terminals
Maracaibo.....			
Puerto Cabello.....			
La Guaira.....	June 7-8	* <i>Congo</i>	Saguenay Terminals
Puerto Cabello.....			
Maracaibo.....			
Las Piedras.....			

Departures from Halifax

(r) Indicates refrigerated cargo space.

Destination	Loading Date	Vessel	Operator or Agent
Cuba— Santiago.....	June 23-25	<i>Magister</i>	Drew, Brown
Dominican Republic— Ciudad Trujillo.....	June 23-25	<i>Magister</i>	Drew, Brown
Haiti— Port au Prince.....	June 23-25	<i>Magister</i>	Drew, Brown
Jamaica— Kingston.....	June 23-25	<i>Magister</i>	Drew, Brown
United Kingdom— Liverpool.....	May 22-27	<i>Newfoundland</i> (r)	Furness Withy
Liverpool.....	June 8-13	<i>Nova Scotia</i> (r)	Furness Withy
Southampton.....	June 6	<i>Aquitania</i>	Cunard Donaldson
Southampton.....	July 2	<i>Aquitania</i>	Cunard Donaldson

Departures from Vancouver

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

(r) Indicates refrigerated cargo space.

Destination	Loading Date	Vessel	Operator or Agent
Africa-East— Lourenço Marques..	May 27 June 7 June 27	<i>Kastor</i> <i>Radja</i> <i>Silvermaple</i>	North Pacific Dingwall Cotts Dingwall Cotts
Africa-South— Cape Town.....	May 27	<i>Kastor</i>	North Pacific
Port Elizabeth.....	June 7	<i>Radja</i>	Dingwall Cotts
East London.....	June 27	<i>Silvermaple</i>	Dingwall Cotts
Durban.....			
Argentina— Buenos Aires.....	June 1	<i>Hindanger</i>	Empire Shipping
Australia— Sydney.....	May 25	<i>Parramatta</i>	Empire Shipping
Melbourne.....	June 3	<i>Sonoma</i>	Dingwall Cotts
Adelaide.....	July 15	<i>Mattawunga</i>	Empire Shipping
Brisbane.....	June 3	<i>Sonoma</i>	Dingwall Cotts
Hobart.....			
Melbourne.....	June 9	<i>Waikawa</i>	Canadian Australasian
Sydney.....			
Sydney.....	June 12	<i>Ventura</i>	Dingwall Cotts
Melbourne.....			
Belgium— Antwerp.....	May 25 June 1 June 12 July 4 July 10	<i>Guayana</i> (r) <i>Argentan</i> <i>Los Angeles</i> (r) <i>Paraguay</i> (r) <i>Pont l'Eveque</i>	Gardner Johnson Empire Shipping Gardner Johnson Gardner Johnson Empire Shipping
Brazil— Rio de Janeiro.....	June 1	<i>Hindanger</i>	Empire Shipping
Santos.....			
Burma— Rangoon.....	June 5	<i>Lawak</i>	Dingwall Cotts

Departures from Vancouver—Continued

Destination	Loading Date	Vessel	Operator or Agent
Canal Zone—	June 1	<i>Santa Leonor</i> (r)	Gardner Johnson
Balboa	June 6	<i>Clove Hitch</i>	Gardner Johnson
Cristobal	June 9	<i>Timber Hitch</i>	Gardner Johnson
Cristobal	May 31	<i>Gunner's Knot</i>	Gardner Johnson
	June 6	<i>Clove Hitch</i>	Gardner Johnson
	June 9	<i>Timber Hitch</i>	Gardner Johnson
Ceylon—	May 27	<i>Riouw</i>	Dingwall Cotts
Colombo	June 10	<i>Høegh Silverbeam</i>	Dingwall Cotts
	June 18	<i>Saparoea</i>	Dingwall Cotts
Chile—	June 1	<i>Hindanger</i>	Empire Shipping
Arica	June 1	<i>Santa Leonor</i> (r)	Gardner Johnson
Antofagasta	June 21	<i>Santa Adela</i> (r)	Gardner Johnson
Valparaiso	July 2	<i>Santa Flavia</i> (r)	Gardner Johnson
China—	June 3-4	<i>Mirrabooka</i>	Empire Shipping
Shanghai	June 28	<i>Mongabarra</i>	Empire Shipping
Colombia—	May 31	<i>Gunner's Knot</i>	Gardner Johnson
Barranquilla	June 6	<i>Clove Hitch</i>	Gardner Johnson
	June 9	<i>Timber Hitch</i>	Gardner Johnson
	June 10	<i>Glimmaren</i>	Empire Shipping
	June 27	<i>Anchor Hitch</i>	Gardner Johnson
Buenaventura	June 1	<i>Santa Leonor</i> (r)	Gardner Johnson
	June 10	<i>Glimmaren</i>	Empire Shipping
	June 21	<i>Santa Adela</i> (r)	Gardner Johnson
	July 2	<i>Santa Flavia</i> (r)	Gardner Johnson
Costa Rica—	May 31	<i>Gunner's Knot</i>	Gardner Johnson
Puntarenas	June 6	<i>Clove Hitch</i>	Gardner Johnson
	June 9	<i>Timber Hitch</i>	Gardner Johnson
	June 10	<i>Glimmaren</i>	Empire Shipping
	June 27	<i>Anchor Hitch</i>	Gardner Johnson
Ecuador—	June 1	<i>Santa Leonor</i> (r)	Gardner Johnson
Guayaquil	June 21	<i>Santa Adela</i> (r)	Gardner Johnson
	July 2	<i>Santa Flavia</i> (r)	Gardner Johnson
El Salvador—	May 31	<i>Gunner's Knot</i>	Gardner Johnson
La Libertad	June 6	<i>Clove Hitch</i>	Gardner Johnson
	June 9	<i>Timber Hitch</i>	Gardner Johnson
	June 10	<i>Glimmaren</i>	Empire Shipping
	June 27	<i>Anchor Hitch</i>	Gardner Johnson
Fiji—	Late June	<i>Thor I</i>	Empire Shipping
Suva	Late July	<i>Thorscape</i>	Empire Shipping
France—	June 1	<i>Argentan</i>	Empire Shipping
Le Havre	July 10	<i>Pont l'Eveque</i>	Empire Shipping
Marseilles			
Germany—	May 25	<i>Guayana</i> (r)	Gardner Johnson
Hamburg	June 12	<i>Los Angeles</i> (r)	Gardner Johnson
	July 4	<i>Paraguay</i> (r)	Gardner Johnson
Greece—	May 23-June 7	<i>Rookley</i>	Anglo-Canadian
Piraeus			
Guatemala—	May 31	<i>Gunner's Knot</i>	Gardner Johnson
Saa Jose	June 6	<i>Clove Hitch</i>	Gardner Johnson
	June 9	<i>Timber Hitch</i>	Gardner Johnson
	June 10	<i>Glimmaren</i>	Empire Shipping
	June 27	<i>Anchor Hitch</i>	Gardner Johnson

Departures from Vancouver—Continued

Destination	Loading Date	Vessel	Operator or Agent
Hawaii— Honolulu	May 31	<i>A Ship</i>	Dingwall Cotts
Hong Kong	{ June 3-4 June 28	<i>Mirrabooka</i> <i>Mongabarra</i>	Empire Shipping Empire Shipping
India and Pakistan— Karachi	{ May 27 June 10	<i>Riouw</i> <i>Høegh Silverbeam</i>	Dingwall Cotts Dingwall Cotts
Bombay			
Bombay	{ June 18 Calcutta	<i>Saparoea</i>	Dingwall Cotts
Calcutta			
Madras	{ June 5 Calcutta	<i>Lawak</i>	Dingwall Cotts
Calcutta			
Indonesia— Batavia	{ May 27 June 5 June 10 June 18	<i>Riouw</i> <i>Lawak</i> <i>Høegh Silverbeam</i> <i>Saparoea</i>	Dingwall Cotts Dingwall Cotts Dingwall Cotts Dingwall Cotts
Soerabaya			
Samarang			
Cheribon			
Italy— Genoa	{ June 28 Naples Venice	<i>Etna</i>	Empire Shipping
Naples			
Venice			
Malaya— Penang	June 18	<i>Saparoea</i>	Dingwall Cotts
Mediterranean— Central and Western Areas	May 23-June 7	<i>Rookley</i>	Canada Shipping
Mexico— Manzanillo	{ May 31 June 6 June 9 June 27	<i>Gunner's Knot</i> <i>Clove Hitch</i> <i>Timber Hitch</i> <i>Anchor Hitch</i>	Gardner Johnson Gardner Johnson Gardner Johnson Gardner Johnson
Acapulco			
Netherlands— Amsterdam	{ June 1 July 10	<i>Argentan</i> <i>Pont l'Eveque</i>	Empire Shipping Empire Shipping
Rotterdam			
New Caledonia— Noumea	{ Late June Late July	<i>Thor I</i> <i>Thorscape</i>	Empire Shipping Empire Shipping
Noumea			
New Hebrides— Port Vila	{ Late June Late July	<i>Thor I</i> <i>Thorscape</i>	Empire Shipping Empire Shipping
Port Vila			
New Zealand— Auckland	{ June 9 Wellington Wellington	<i>Waikawa</i> <i>Ventura</i>	Canadian Australasian Dingwall Cotts
Wellington			
Wellington			
Persian Gulf	{ May 27 June 19	<i>Riouw</i> <i>Høegh Silverbeam</i>	Dingwall Cotts Dingwall Cotts
Peru— Callao	June 1	<i>Hindanger</i>	Empire Shipping
Callao	{ June 1 June 21 July 2	<i>Santa Leonor</i> (r) <i>Santa Adela</i> (r) <i>Santa Flavia</i> (r)	Gardner Johnson Gardner Johnson Gardner Johnson
Mollendo			

Departures from Vancouver—Concluded

Destination	Loading Date	Vessel	Operator or Agent
Philippines—			
Manila.....	June 10	<i>Höegh Silverbeam</i>	Dingwall Cotts
Iloilo.....			
Cebu.....			
Manila.....	June 5	<i>Lawak</i>	Dingwall Cotts
Iloilo.....			
Manila.....	May 27	<i>Riouw</i>	Dingwall Cotts
Cebu.....	June 3-4	<i>Mirrabooka</i>	Empire Shipping
	June 18	<i>Saparoea</i>	Dingwall Cotts
	June 28	<i>Mongabarra</i>	Empire Shipping
Samoa—	June 9	<i>Waikawa</i>	Canadian Australasian
Apia.....	Late June	<i>Thor I</i>	Empire Shipping
	Late July	<i>Thorscape</i>	Empire Shipping
Pago-Pago.....	June 3	<i>Sonoma</i>	Dingwall Cotts
	June 12	<i>Ventura</i>	Dingwall Cotts
Singapore.....	May 27	<i>Riouw</i>	Dingwall Cotts
	June 18	<i>Saparoea</i>	Dingwall Cotts
Society Islands—	June 9	<i>Waikawa</i>	Canadian Australasian
Papeete.....	Late June	<i>Thor I</i>	Empire Shipping
	Late July	<i>Thorscape</i>	Empire Shipping
Sweden—	May 25	<i>Guayana (r)</i>	Gardner Johnson
Stockholm.....	June 12	<i>Los Angeles (r)</i>	Gardner Johnson
Gothenburg.....	July 4	<i>Paraguay (r)</i>	Gardner Johnson
Trieste.....	June 28	<i>Etna</i>	Empire Shipping
United Kingdom—			
Manchester.....	June 7	<i>Pacific Exporter</i>	Furness Withy
Unstated Ports.....	June	<i>Oceanside</i>	Seaboard Shipping
Uruguay—			
Montevideo.....	June 1	<i>Hindanger</i>	Empire Shipping
Venezuela—	May 31	<i>Gunner's Knot</i>	Gardner Johnson
Maracaibo.....	June 6	<i>Clove Hitch</i>	Gardner Johnson
	June 9	<i>Timber Hitch</i>	Gardner Johnson
	June 27	<i>Anchor Hitch</i>	Gardner Johnson

Services to Newfoundland

Transportation is a major factor in the economy of Newfoundland, which is served by a number of steamship services operating the year round from Halifax and North Sydney, and from Montreal during the season of open navigation on the St. Lawrence. Trans-Canada Air Lines also maintains a daily service between Montreal and Gander Airport, via Moncton, N.B., and Sydney, N.S. Boston is likewise connected with Gander Airport, via Yarmouth, N.S., Saint John, N.B., and Halifax, N.S. Steamship companies, ports of call and the frequency of their services are as follows:

Furness Warren Line—Halifax to St. John's—Three-weekly.

Furness Red Cross Line—Halifax to St. John's—Weekly.

Blue Peter Steamship Line—Montreal to St. John's—Ten-day.

Newfoundland-Canada Steamships—Montreal to St. John's—Fortnightly.

Newfoundland-Canada Steamships—Halifax to St. John's—Tri-monthly.

Shaw Steamships—Halifax to St. John's—Weekly.

Rowlings Limited—Halifax to St. John's—Fortnightly.

Clarke Steamships—Montreal to St. John's—Fortnightly.

Clarke Steamships—Montreal to Corner Brook—Fortnightly.

Newfoundland-Great Lakes Steamships—Hamilton and Toronto to St. John's—Fortnightly.

Canadian National Railways—North Sydney to Port aux Basques—Tri-weekly.

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: Boite Postale 373.

Territory includes Angola and French Equatorial Africa.

Belgium

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

Territory includes Luxemburg.

Brazil

Rio de Janeiro—MAURICE BÉLANGER, Commercial Secretary, Canadian Embassy, Edifício Metropole. Avenida Presidente Wilson 165. Address for letters: Caixa Postal 2164.

São Paulo—Acting Canadian Government Trade Commissioner, Canadian Consulate, Edifício 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 America Building. Address for letters: Casilla 771.

Territory includes Bolivia.

China

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

Colombia

Bogotá—H. W. RICHARDSON, 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, Iraq, Israel, Lebanon, 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, 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.

Foreign Trade Service Abroad—Continued

Guatemala

Guatemala City—J. C. DEPOCAS, Canadian Government Trade Commissioner, No. 20, 4th Avenue South. Address for letters: 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.

Japan

Tokyo—J. C. BRITTON, Commercial Representative, Canadian Liaison Mission, Canadian Legation Building.

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, Sophia-laan 1-A.

New Zealand

Wellington—P. V. McLANE, Commercial Secretary, Office of the High Commissioner for Canada, Government Life Insurance Building. Address for letters: 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, Government Life Insurance Building. Address for letters: 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 Iran and 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, 43 St. Vincent Street. 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. Address for letters: Post Office Box 2220, 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 Center.

Territory includes Bermuda.

Cable address, Cantracom.

New York City—M. B. BURSEY, Canadian Government Trade Commissioner (Fisheries Specialist), British Empire Building, Rockefeller Center.

Boston—T. F. M. NEWTON, Consul of Canada, 532 Little Building, 80 Bolyston 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.

Venezuela

Caracas—C. S. BISSETT, Canadian Government Trade Commissioner, Canadian Consulate General, 8° Piso, Edificio America, Esquina 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 May 2	Nominal Quotations May 9
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.....	Cruzerio	....	.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.	.0036	.0036
		Free	.0030	.0030
French Empire—African.....	Franc	....	.0073	.0073
French Pacific Possessions.....	Franc	....	.0201	.0201
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
Israel.....	Pound	....	4.0300	3.0000
Italy.....	Lira	....	.0017	.0017
Jamaica.....	Pound	....	4.0300	4.0300
Japan.....	Yen	....	.0027	.0027
Mexico.....	Peso	....	.1405	.1273
Netherlands.....	Florin	....	.3769	.3769
Netherlands Antilles.....	Florin	....	.5302	.5302
New Zealand.....	Pound	....	4.0150	4.0150
Norway.....	Krone	....	.2015	.2015
Pakistan.....	Rupee	....	.3022	.3022
Peru.....	Sol	....	.1538	.1538
Philippines.....	Peso	....	.4975	.4975
Portugal.....	Escudo	....	.0403	.0403
Siam.....	Baht	....	.1000	.1000
Singapore.....	Dollar	....	.4701	.4701
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