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In This Issue

Regular Features

COVER SUBJECT—Montserrat, thirty-two square miles in area, is the southernmost of the Leeward Islands, which may be united with Barbados, British Honduras, Jamaica, Trinidad and the Windward Islands in a British West Indian Federation, presently under consideration. Montserrat, which is mountainous and volcanic, was discovered by Christopher Columbus in 1493, and first colonized by the Irish in 1632. Sea Island cotton is the principal crop, though limes and tomatoes are also important. Further efforts are being made to develop the tourist facilities of the Eastern Caribbean colonies. (See report on this area on page 911 of this issue of Foreign Trade.)

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Stronger Import Policy is Urged By United States Trade Mission

Report of Economic Co-operation Administration and Department of Commerce reveals that exports during past 35 years have been largely subsidized—Measures for increasing sales in United States applicable alike to European and Canadian exporters.

By J. H. English, Commercial Counsellor for Canada

WASHINGTON, October 27, 1949.—Recognition of the importance to the continuing welfare of the United States of a substantially increased import trade is heavily underlined in a report issued this week by a joint mission of the Economic Co-operation Administration and the United States Department of Commerce, recently returned from Europe. The report, which runs to some 200 pages, reviews the current unbalanced trade situation between the United States and Western Europe and traces the history of trade balances since 1914. It shows that, while the dangerous implications of the dollar gap are only now being revealed, the shortage of United States dollars has, in fact, a long history of some 35 years. From 1914 to 1948, United States exports of goods and services amounted to $270 billion, while imports of goods and services totalled only $169 billion. For this period, therefore, the United States had an excess of exports over imports of $101 billion.

The report reviews the development of this situation through the past 35 years, pointing out the circumstances which contributed to the development, as well as the means employed in the past in the settlement of the world's unfavourable balance with the United States. Although, of course, precise figures are not available, it is shown that during this period some $68 billion were provided by the United States government in the form of grants and loans, mostly since 1941. Private remittances by United States residents to overseas countries accounted for $10·5 billion, short-term private capital for $10·5 billion, and the balance of about $15·5 billion, which represented approximately the balance of the dollar gap, was made up by the transfer of gold to the United States and by the liquidation of assets held in the United States by foreign countries.

It will be seen that during this 35-year period the United States experienced an annual average of commodity exports over imports of approximately $3 billion. In 1946, however, the export surplus rose to $7·8 billion, reached $11·3 billion in 1947 and stood at $6·3 billion in 1948. It is apparent from the foregoing that the United States Government has been in large measure subsidizing its export trade, unconsciously perhaps, but almost continuously since 1914. The dollar gap has been made up, as mentioned, by gifts, loans and other transfers. Moreover, in the long run, this heavy bill has been met by the United States taxpayer.

Elimination of Subsidies Essential

One of the objectives of ECA, as set forth in the Foreign Assistance Act, is to aid participating countries in becoming independent of extraordinary outside economic assistance, to bring international transactions into equilibrium, to free and expand international trade, to raise and maintain the standard of living, especially in Europe, and at the same time to remove the heavy financial burden on the United States. The report points out it is essential that steps be taken forthwith to eliminate the dollar gap by more satisfactory means than by continued subsidization. Indeed, as the report mentions, aside from the continuation of subsidies by the United States Government in the form of grants, etc., the alternatives are:

(*a*) A reduction in United States exports, which would, of course, stagnate trade and do irreparable harm to United States industry.

(*b*) Expand United States foreign investments, which in the long run would only increase the problem of overseas countries.

(*c*) Expand United States imports.

It is this latter alternative which is recommended, and toward which the whole report is largely directed.

In a country where exports have almost always exceeded imports by a considerable margin, and where the great bulk of the people have been led to believe that to import other than raw materials almost savoured of unpatriotism, the authors of the report have had to deal with considerable care with their unprecedented recommendation of a very substantial increase in United States import trade. It is not surprising, therefore, to find their remarks tempered with the statement that "there is no question here of any obligation on our part of buying from abroad things that are not satisfactory to us—things that we do not want. It is rather a question of stimulating other countries to exert efforts and to use their inherent resources and capacities in producing and in selling us things our consumers and businessmen do want; and it is a further question then on our part of not maintaining or raising barriers to prevent these countries from earning their way by selling these desirable goods and services in our market."

Two-billion-dollar Increase Reasonable

The report then suggests that an increase in imports from abroad of $2 billion a year would be reasonable and attainable and would represent hardly 1 per cent of the gross national income in 1948. It is emphasized that wishful thinking will not bring about the desired results. Expanded import trade must be the creation of traders—primarily the overseas exporter, but supported by the American importer. Even the best will to succeed can, however, be frustrated by artificial barriers in both the exporting and the importing countries and by undesirable business practices. Among the obstacles, whose elimination will foster expanded import trade, are:

(*a*) Oppressive export controls in overseas countries

(*b*) High United States tariffs

(*c*) Inequitable United States customs procedures

(*d*) Continued "Buy American" restrictions by state and federal governments

(*e*) High prices.

The lack of sufficiently aggressive selling in the American market is also stressed, as well as the frequent inadequacies of credit facilities.

On the subject of United States customs procedures, the report suggests the following action by the United States authorities:

(*a*) Drop foreign value as the prime basis for assessing ad valorem duties in favour of export value.

(*b*) Devise simpler methods for customs conversion of foreign multiple currencies.

(*c*) Curtail the classes of merchandise on which foreign suppliers are required to present consular invoices.

(*d*) Establish procedure for furnishing binding rulings as to customs classifications in advance of actual importations.

(*e*) Establish procedure for guaranteeing that, once goods have been classified by the Bureau of Customs, such classification would remain in effect for a period of at least two years.

(*f*) Limit application of countervailing duties to offset foreign export subsidies to cases involving injury to an American industry.

(*g*) Revise the anti-dumping act to require a *prima facie* showing of injury to domestic producers before suspension of imports.

(*h*) Reduce customs formalities on imports of small value. Base the assessment upon the appraised value of imported merchandise, whether higher than "entered value" or not.

Plan of Campaign Outlined for Exporters

Finally, useful suggestions are made as to what European business can do to help itself to gain access to the United States market. As most of the points made could apply equally to Canadian exporters, they are reproduced in extenso as follows:

(*a*) Develop aggressive campaigns to sell in the United States market. European businessmen should actively seek buyers, not wait until buyers arrive at their shops or plants.

(*b*) Re-examine their channels of distribution and historical exports in the United States. Modern marketing procedures and improved advertising media pointed toward different market areas should be selected. Many European firms which produce and sell handicraft and specialty products are too small to engage individually in direct distribution. Combinations of such firms which handle non-competitive but allied products can organize joint export and United States marketing organizations.

(*c*) Arrange meetings with American buyers and businessmen, both in Europe and in the United States, to exchange current information on new market opportunities for their particular products. Some European exporters and industrialists use outmoded and poor sales methods in selling their products to visiting American buyers.

(*d*) Personally study United States markets and methods. Their objectives should be the employment of aggressive and experienced American agents able to secure interior as well as seaboard distribution for their products.

(*e*) Maintain larger inventories in the United States, strategically located to service repeat orders and replacements promptly.

(*f*) Participate in all major trade fairs which may be held in the United States, either as individual firms or in groups.

(*g*) Cultivate the full potentialities of the American tourist trade. In addition to maintaining tourist facilities, such as hotels, restaurants and transportation, at maximum efficiency and attractiveness, European business should realize to the full the potentialities for direct sale of merchandise to the American tourist.

(*h*) Set up trade promotion staffs in the United States to promote exports to this country. They could do this individually as trade associations or other organizations of businessmen. They could be the link between a similar governmental effort and those of specific industries and trade organizations at home.

(*i*) Become more familiar with the requirements of the United States market as to standards and sizes, packaging, colours and styles. Some of their historical export products which have become outmoded during the past ten years of technological advance in the United States should be restyled and new products should be developed.

(*j*) Make an all-out effort to increase management-labour productivity and efficiency, lower production costs and overhead, and reduce prices.

(*k*) Develop procedures for sub-contracting portions of large orders to firms in other European countries as well as their own.

(*l*) Develop the United States market for the available output of specific factories. European producers have frequently been dismayed at their inability to accept orders from the United States because of the size of the order. This, of course, should not prevent them from actively exploring the possibilities for distribution in portions of the United States market of the quantities of their product which they are capable of delivering.

(*m*) Organize information offices in the regions where their industries are most concentrated.

(*n*) Work with their governments in developing better trade promotional representation in their European government missions in the United States in strategic market centres.

(*o*) Inform and educate itself, labour and the public on the necessity to produce, at a profit but at competitive prices, goods for export to the United States.

(*p*) Analyze all credit facilities available to it, seek better financial services from private sources for export trade and, if available credit facilities cannot supply necessary assistance at low rates and for sufficiently long terms, approach their governments for additional co-operation.

(*r*) Persuade European banks and financial organizations to take the lead in promoting profitable exports to the United States.

(*s*) Make permanent associations with United States distributors through financial, long-term participation in joint export-import enterprises.

(*t*) Explore new opportunities in their overseas territories, possibly in partnerships with United States private enterprise capital, through which exportable commodities can be created for the dollar market.

Pork Products Removed from Export Control

Controls on the exportation of all pork products have been suspended, effective November 7, 1949, although export permits will still be required. Canned hams were removed from allocation, for shipment to all countries, on October 28. Canned pork products were removed from export control on November 5, and it has now been decided to suspend control on the exportation of dressed pork products to all countries, with the exception of the United States and Alaska.

The only canned pork products that may be exported to all destinations without an export permit are comminuted pork products. The undermentioned edible pork products may also be shipped without an export permit: brains, casings, ears, feet, hearts, hog bungs, hog bung caps, kidneys, livers, skins, snouts, stomachs and tails.

Further Improvement Recorded In Foreign Trade of Sarawak

Returns for 1948 indicate increases of 26 per cent in imports and 65 per cent in exports—Favourable balance of trade higher by 130 per cent as compared with 1947—Trade in crude and refined oil accounts mainly for improvement.

By Paul Sykes, Canadian Government Trade Commissioner

(All figures in Straits dollars; one Straits dollar equals approximately $0.47 Canadian)

SINGAPORE, October 9, 1949.—Returns of Sarawak's foreign trade for 1948 show a highly satisfactory improvement over those of the previous year. Imports increased in value from $72,254,705 to $98,769,885, exports from $103,138,575 to $171,250,887, and total trade from $175,393,280 to $270,020,772. The 26 per cent improvement in imports and the 65 per cent increase in exports combined to produce an appreciation in the favourable trade balance of $41,500,000, or some 130 per cent.

The development in the colony's trade during the last fifty years is little short of phenomenal. As between 1898 and 1948, imports increased from $2,471,878 to $98,769,885, while exports showed an even greater expansion—from $3,221,079 to $171,250,887. The total value of the trade last year was some 47½ times what it had been fifty years before.

Oil is of Major Importance

The colony's trade in crude and refined oil once again accounted for a major part of the total value of import and export business. Crude oil imports alone were valued at $47,140,684 and, with the addition of small values for refined oil products, made up practically half of the total for all commodities. The crude oil is imported entirely from the adjacent sultanate of Brunei for export as such or in refined form from the port of Miri. Such exports comprised liquid fuel valued at $53,967,290, crude oil at $49,320,417 and motor spirit at $7,120,787, the total amounting to $110,408,494, or 64·6 per cent of the value for all commodities. These figures of Sarawak's oil trade in 1948 show substantial increases in the value of crude oil imports as compared with 1947 and considerably greater increases in export values deriving from expanded refining capacity and improved production of crude oil from the colony's own wells near Miri.

Apart from the trade in oil and its products, imports were made up to a substantial extent by rice valued at $7,201,838; cigarettes and tobacco, $5,491,009; cotton piece-goods, $3,599,759; sugar, $2,417,147; films, $2,438,498; condensed and powdered milk, $1,500,000; miscellaneous iron and steel manufactures, $1,311,681; and dried fish, $1,087,528. The balance, of some $25,400,000, comprised a wide variety of foodstuffs and other consumer goods, machinery, gunny sacks and electric equipment.

The colony's exports are considerably more restricted in variety. Second in importance to the trade in oil and oil products was rubber, with a 1948 value of $34,532,924, followed by sago flour, $11,124,325; jelutong, $2,228,479; pepper, $1,159,242; lumber, $1,158,335; and copra, $1,040,412. Other commodities, exported in smaller quantities, included cutch, various gums, raw sago, dried fish and coconut oil.

The importance of Brunei as a source of supply of Sarawak's requirements of crude oil for refining or re-export has already been mentioned,

Borneo and Sarawak comprise the large land mass in the centre of this map, the former consisting of a triangular area in the northwestern section. The sultanate of Brunei is at its upper extremity, with British North Borneo at the apex.

Courtesy Canadian Geographical Society.

and the value of the business gives the sultanate first place among the colony's suppliers. Of greater significance from a general trading point of view, however, is the outstanding position held by Singapore as a supplier of ordinary import requirements. In 1948, out of a total import value for all commodities except crude oil amounting to $51,308,407, Singapore supplied to a value of $35,541,396. The only other noteworthy sources of direct import trade were Thailand, the United Kingdom, Dutch Borneo and Burma, but for all these suppliers the business was of comparatively small value. More or less the same situation applies in the case of Sarawak's exports. Crude and refined oils are, of course, shipped to a variety of destinations, such as Sumatra, Singapore, Australia, China and other Pacific and Middle Eastern countries but, as far as general goods are concerned, Singapore accounted for $44,903,936 out of a total value for export shipments of $59,469,991. The only other destinations of direct exports of any importance were the United States, United Kingdom, Dutch Borneo, France, Brunei, and Japan. The value of Singapore as a centre of entrepôt trade, not only for Sarawak but equally for many other parts of Southeast Asia, is indicated by these figures.

As between Sarawak's various ports concerned with large-scale import and export trade, the oil port of Miri is outstanding with values for 1948 of $52,252,747 for imports and $113,686,152 for exports. Corresponding figures for Kuching, which handles larger general cargoes than any of the other ports, were $33,791,993 and $31,220,221. Next in order was Sibu with imports valued at $10,154,825 and exports at $17,797,705, largely rubber and sago flour, followed at a considerable distance by the secondary ports of Sarikei, Binatang, Bintulu, Limbang and Lawas. Apart from their trade in general imports, the ports of Sarikei, Binatang, Limbang and Lawas are concerned with exports of rubber, while Bintulu is outstanding as a shipping centre for the jelutong trade.

New Zealand Import Licences Limited To Essential Items During Next Year

No purchases permitted where locally manufactured goods reasonably competitive in price and quality—Reduction of twenty per cent in quota values, based on pre-1949 years, to compensate for return of New Zealand pound to parity with sterling.

WELLINGTON, October 17, 1949.—(FTS)—Available overseas funds will be used during the coming year for the purchase of essentials, but New Zealand will not issue licences for imports so long as locally manufactured goods are reasonably competitive in price and quality. No increases are indicated in the schedule of import licensing allocations, and there is a reduction of twenty per cent in the value of licences, based on the years preceding 1949, in order to compensate for the return of the New Zealand pound to parity with sterling.

No change in the general procedure for issuing import licences next year has been made. While licences will cover the period from January 1 to December 31, 1950, they will be available for imports up to February 28, 1951. Basic allocations have been provided for most imports from soft-currency areas, and in the majority of cases they are related to licences issued in 1948 or 1949. This is more satisfactory than the previous system of basing licences on prewar years.

No allocations have been made for imports from Canada, the United States, Belgium or Switzerland, and applications to import from these sources are to be considered on their merits. Since it is desired to keep dollar payments as low as possible during the first half of 1950, importers have been requested to limit as far as possible applications for licences to import from these areas. They have also been requested to refrain from making payment during that period if it can be avoided.

System of Half-yearly Licences Introduced

In order to maintain closer control over commitments of dollar funds, a system of half-yearly licences has been introduced for imports from Canada and the United States. Licences are to be issued for the half-yearly periods January 1, 1950, to June 30, 1950, and July 1, 1950, to December 31, 1950. It is proposed to grant licences only for the first half-yearly period, but importers may submit new applications covering each half-yearly period. Importers are to indicate on the application the date by which it is expected that shipment will be made, and also to state what arrangements have been made regarding payment for the goods; that is, whether payment is to be made at time of shipment or subsequently.

If there are special reasons which would warrant the granting immediately of a licence for goods to be imported after June 30, 1950, special consideration will be given.

No indication has as yet been given of the value of licences to be granted for imports from Canada for the first half of 1950, but investigations are now being carried out to ascertain what items can be made subject to reductions. It is doubtful if a full 25 per cent reduction in dollar imports, as indicated at the Finance Minister's Conference in London will be possible, but there will almost certainly be a reduction in imports of motor vehicles, licences for which were issued in 1949 to a value of £350,000.

Gift Parcels Containing Specified Items Admitted by Great Britain Duty Free

Foodstuffs, discarded wearing apparel, medical supplies and soap not subject to duty—New clothing or that merely laundered not included—Contents should be clearly listed.

LONDON, November 4, 1949.—(FTS)—Unsolicited gift parcels, containing only foodstuffs, discarded wearing apparel, medical supplies and soap, will be admitted duty free by the customs authorities in Great Britain. Gift parcels, containing additional articles, such as new clothing and clothing that has been merely laundered or given token wear, are subjected to the normal duty and tax. Donors wishing to avoid any expense to recipients of their gifts should therefore confine their choice of presents to foodstuffs, discarded apparel, medical supplies and soap.

To facilitate clearance on arrival in this country, senders should specify the nature of the contents of parcels accurately on the customs declaration forms. Attempts to conceal chargeable goods with free items in gift food parcels render the entire contents liable to confiscation.

The import licensing requirement is waived for gift parcels not exceeding 22 pounds gross weight, if sent by freight or express, and not exceeding 20 pounds, if forwarded by parcel post. All parcels should be clearly marked as gifts.

Most personal and domestic articles sent to this country as gifts are charged with import duty and purchase tax. Articles consigned from and grown, produced or manufactured in Commonwealth countries are admissible under imperial preference, either free of customs duty or at reduced rates, but are still subject to purchase tax. The latter is primarily a charge on goods produced in Great Britain, but in fairness to domestic producers it applies equally to imports.

The rate of duty and purchase tax vary for different kinds of articles. Tobacco and liquor, and luxury or semi-luxury articles, such as jewellery, cosmetics and fancy goods, are subject to particularly heavy duty. In fact, the customs charges may be more than the original price of the commodities concerned.

United States Army Reducing Operations in Eastern Caribbean

Port-of-Spain, September 28, 1949.—(FTS)—As a result of reduced appropriations, the United States armed services are in the process of reducing operations on their bases in the Eastern Caribbean. Recently the air fields in Antigua, St. Lucia and British Guiana have been handed over to the local colonial authorities for civilian use. Included in these arrangements has been the purchase of buildings and equipment. It is understood that the next base to be turned over will be Waller Field in Trinidad.

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San Francisco Occupies Leading Place in Trade of Philippines

Commercial houses of long standing continued close connections with the Islands after a republic was established in 1946—Preferential treatment provided for products of United States and the Philippines over a period of twenty-five years—Canadian trade with the Far Eastern Republic increasing.

By C. N. Senior, Canadian Consul

(Editor's Note—The Canadian Trade Commissioner Service will open an office early next month in Manila, in an effort to establish closer commercial relations with the Philippines. One peso equals $0.55 Canadian.)

SAN FRANCISCO, September 26, 1949.—Trade associations between the Philippines and San Francisco have been extended over a term of years, during which the United States was largely responsible for the administration of the group of islands in the Western Pacific. Although a republic was created in 1946, little change in the trading pattern of the Philippines occurred. The new tariff provides the United States with preferential treatment for the next twenty-five years, and the commercial houses of San Francisco maintain the connections developed over a period of nearly fifty years.

The Philippine Islands and the United States have, by concurrent legislation, provided that goods from one country may enter the other duty free until 1954, when imports from the United States will be subject to customs duty. The rate during the first year will be only five per cent of the full rate of duty appearing in the tariff of the Philippines. The rate will be increased by five per cent each year until 1974, when the full rate of duty applicable to any other country will apply to imports from the United States.

The preference extended by the United States operates in similar fashion. Even after 1974, Philippine products entering the United States will enjoy a degree of preference, as the rate of duty applicable will be the lowest applied by the United States to any other country. Cuba has the lowest rate at present. The preference accorded by the United States is modified, however, by a series of quotas for certain Philippine products. Until 1954, these quotas are as follows:

United States Import Quotas for Philippine Goods

Sugar	850,000	long tons (not more than 50,000 tons refined)
Cordage	6,000,000	pounds
Cigars	200,000,000	
Scrap and filler tobacco	6,500,000	pounds
Coconut oil	200,000	long tons
Pearl and shell buttons	850,000	gross
Rice	1,040,000	pounds

The quotas on cigars, tobacco, coconut oil and buttons will be reduced annually after 1954 by five per cent until they disappear in 1974. The products covered by quotas enter duty free, but any importation in excess of the quota prevailing in a given year will be subject to the full rate of duty.

The quota on rice is of little significance, since the Philippine Republic at the present time is an importer of rice. Similarly, the Philippines have not yet been able to deliver any significant quantity of cigars to the United States. These situations reflect the rehabilitation difficulties confronting a country ravaged by war.

Measures Reduce Requirements of Dollar Exchange

Nor have the Philippines escaped the universal dollar shortage. The problem of reducing foreign exchange requirements has been met by a series of measures of which two should be mentioned. High taxes have been imposed on luxuries and semi-luxuries. Like Canada, the Republic has also established quotas restricting the importation of luxuries and non-essentials. The Import Control Act of June, 1948, went into effect on January 1 of this year. Quotas were a percentage of importations during the fiscal year 1948. Most of the quotas were at the rate of 40 to 50 per cent of 1948 imports but, on a small number of commodities, there were cuts ranging from 20 to 90 per cent. Among the restricted items are automobiles, perfumes and toilet preparations, alcoholic beverages, most textile manufactures, watches and clocks, chewing gum, tobacco products, ready-made cotton articles, cotton grey cloth, lard and substitutes, soap, all fresh fruits, beer, furniture, matches, various rubber products, nails, Portland cement, raw rubber, fresh and canned vegetables, canned pineapple. These quotas are subject to change and, since the original percentages were announced, some of them have been made more stringent.

There is, however, nothing in the quota restrictions altering the tariff preferential treatment accorded to the United States.

The second important factor in the new approach to trade with the Philippines is the extent to which it is directed by experienced trading firms in San Francisco. Although the Republic was born only three years ago, and its Consulate General here is one of the most recently opened, it is the largest and busiest consular office in San Francisco, with a staff of thirty. Practically all large Philippine commercial firms have offices in San Francisco. This is no accident. Some established their American offices elsewhere, but found it more advantageous to shift to this focal point.

From the windows of a suite of offices on one of San Francisco's busiest downtown stores there hangs a banner inscribed "Quirino for President Club". It is almost impossible for a Canadian to conceive of any foreign city being so important to Canada as to inspire one of its national political parties to establish therein a campaign headquarters. The fact, therefore, that President Quirino in his current campaign for re-election finds it advisable to maintain an electioneering organization in San Francisco speaks eloquently of the importance that this city has in relation to the Island Republic.

That importance stems from the very nature of San Francisco's history and development. San Francisco is today the headquarters of a number of trading firms of world-wide reputation and interests. It is a headquarters for United States trade with the Far East and in that field there is under present day conditions probably no more important country than the Philippines.

Traders Entered Oriental Trade on Ground Floor

San Francisco is this year celebrating the Centenary of the '49 gold rush. The spacious harbour within the Golden Gate resulted from earliest days in this city becoming an important shipping centre. When almost concurrently China and Japan were opened up to foreign trade, San Francisco was the only important shipping and commercial centre on the west coast of this continent. Her enterprising merchants and traders were presented with a marvellous opportunity to move in on the ground floor of this new oriental trade, and they availed themselves of that opportunity.

Other great cities and seaports have grown up along the Pacific coast. The physical operations of shipping have been dispersed, although San Francisco's share is still far from insignificant, but the banking, the financial, the insurance and the brokerage operations connected with the Far Eastern trade have remained very largely centred in this city.

A Filipino described the current situation in the following terms: "When a Philippine businessman wants to buy or sell anything outside the country, he almost automatically writes or cables San Francisco." The physical volume of goods passing through San Francisco Bay terminals is a minute percentage of the trade which is booked by San Francisco merchants, traders and brokers.

Traders and Brokers Have World-wide Connections

These traders and brokers, large and small, surrounded as they are by banking and insurance facilities with world-wide connections and almost unlimited resources, constitute a funnel through which trade with the Philippines is largely directed. So long as the preferential trade arrangement between the United States and the Philippines lasts, there is no reason to believe that they will be supplanted.

Chief exports of the Philippines in the past three years have been copra and coconut products, embroideries, sugar, canned pineapple, chromite, abaca and rope, and tobacco. There would be little point in enumerating the principal imports because they cover practically the whole range of capital and consumer goods.

Since the war, the Philippines have had a vast excess of imports over exports, as is indicated by the following table published by the Federal Reserve Bank of San Francisco:

Philippine Foreign Trade

	1946	1947	1948
	(Thousand pesos)		
Total exports (including re-exports)....	128,375	531,097	638,410
Total imports	591,716	1,022,701	1,136,409
Import surplus	463,341	491,604	497,999

Eighty-two per cent of the Philippine imports in 1948 came from the United States, and 78 per cent of the exports went to the United States.

Canadian Exports to Philippines Greatly Increased

Canada's exports to the Philippines have been steadily increasing since the war. In the first six months of 1949 their value was $5,972,379. The principal items were as follows:

Wheat flour	$3,458,389
Machinery, including agricultural and mining machinery.......	910,993
Fertilizers	710,744
Newsprint	378,930
Fish, chiefly canned salmon and sardines	121,742
Radio receiving sets	94,418

Notable among the machinery items lumped together above were gasoline engines, reapers and cultivators. Other items which moved in small quantities, but which nevertheless may be suggestive of future opportunities, were artificial silks, softwood plywoods and fountain pens.

At the present time, the principal objectives of economic policy in the Philippines are balancing the budget and balancing the trade. In this latter connection, one of the chief problems is that of attracting capital for the restoration of industrial equipment destroyed by the war and for the establishment of new industries. Although there is a large volume of United States capital invested in the Philippines, there has been some disappointment at the failure of new capital to participate in this program.

Great Britain Announces Further Cuts In Purchases from Dollar Countries

Imports will be restricted to $1,200 million a year, compared with rate of $1,650 million for the first half of 1949—Main reductions apply to food, tobacco and raw materials.

LONDON, October 26, 1949.—(FTS)—Prime Minister Clement Attlee has announced that Great Britain will restrict her dollar purchases to $1,200 million a year, which compares with an annual rate of $1,650 million for the first half of 1949. Despite the standstill order in September, the rate of expenditure has not dropped as rapidly as was anticipated. While, therefore, the Treasury expects that imports will be cut to $600,000,000 in the first half of 1950, the total for the twelve months ending next June will probably be $1,400 million.

The program has been arranged to provide the necessary raw materials for anticipated production but on the basis of the greatest economy in use and the elimination of all waste. The policy will be to preserve dollar raw materials for the export trade. As little as possible will be used for supplies to the home market.

The chief dollar import cuts will be in food (other than wheat and sugar), in tobacco and in raw materials of various kinds, due to diversions of purchases to other areas and greater economy in use.

At the same time, economies in government expenditures are to be effected, amounting to £250 million a year. This includes a cut of £140 million in capital expenditure, which becomes fully operative in the second half of next year. A reduction in the housing program and in private building will save £70 million annually.

The subsidy on animal feeding-stuffs, now £36 million a year, will cease next February. There will also be increases in the prices of some less essential foods like dried and frozen eggs and raisins. At the end of the winter it is proposed to remove price control on fish and, with the abolition of maximum prices, the present subsidy on fish will be eliminated. These adjustments will, it is estimated, save £7 million in a full year.

The economy measures also include a charge of not more than one shilling on each prescription, under the National Health service.

Peru Buys Dairy Cattle from Holland

The Hague, October 21, 1949.—(FTS)—Peru has recently purchased 3,000 head of dairy cattle from the Netherlands, 20 per cent of these being purebred animals. This is the first order received by the Netherlands from Peru, and will be filled as soon as financial and other arrangements have been completed. A livestock expert is due shortly to check on the quality and health of the animals concerned.

Australian Export Position May Be Improved by Devaluation

Country may become more dependent on own resources, presenting real challenge to secondary industry—Sixty-one per cent of exports directed to sterling countries and thirteen per cent to hard-currency countries—Postwar boom has ended, having been accelerated by coal strike—Favourable balance of trade for fiscal year higher.

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

(One Australian pound equalled $3.2240 as at September 17, 1949)

(Editor's Note—This is the first in a series of three reports on economic conditions in Australia, prepared for reproduction in *Foreign Trade.*)

SYDNEY, N.S.W., September 21, 1949.—Devaluation of the pound sterling should improve the export position of Australia. It may also force this country to become more dependent on its own resources, thereby presenting a real challenge to secondary industry. While the effects of devaluation on the cost structure of Australian industry cannot be gauged as yet, the economic position of the country remains reasonably stable. However, over the past years, domestic production has not been sufficiently high to maintain existing living standards. The high export income of Australia has made possible large importations of raw materials and consumer goods, thereby satisfying monetary purchasing power. Should export incomes decline, even relatively to the cost of imports, the real danger inherent in low domestic production may be exposed.

Australian exports are largely directed to the sterling area and soft-currency countries, most of which have followed the sterling devaluation. During the 1948-49 fiscal year, 61 per cent of these exports were directed to sterling countries in the Commonwealth, 26 per cent to soft-currency countries, and 13 per cent to hard-currency countries, such as Canada, Belgium, Germany, Japan, Switzerland and the United States.

This pattern of trade may not be greatly affected by devaluation, though increased sales and prices to hard-currency areas for some commodities may be expected. Australian exports depend largely on primary products, such as wool, wheat, meat, dairy produce, fruit and eggs, though manufactures are becoming increasingly important. The effect of devaluation on these items is as follows:

Sale of Wool Enhanced

Wool—It is expected that all countries that have not devalued their currencies, the United States in particular, will be in a strong position at the wool auctions. While the United Kingdom and Italy, which sell large quantities of materials and woollen manufactures to the dollar area, will also be in a position to buy strongly by reason of the improved competitive position of their goods in the North American market, it is not possible to determine the net difference between the former level of dollar earnings from wool sales to North America and the new level resulting from devaluation, as this will depend on quantities and prices. It is expected, however, that Australian wool growers will benefit.

Wheat and Flour—Because the sterling area as a whole is a net imported of dollar wheat, and virtually the entire Australian wheat crop is sold to sterling countries, any diversion of Australian wheat to hard-currency countries would result in increased purchases of wheat by countries in the sterling area. Moreover, any diversion of this nature would disturb the traditional pattern of Australia's export trade in wheat and flour. The sale of the 1948-49 wheat crop is virtually complete.

One effect of devaluation is to raise the international price limits of wheat under the International Wheat Agreement, in terms of sterling and Australian currency. The limits are expressed in dollars (e.g., for 1949-50 the maximum price is $1.80 and the minimum $1.50 per bushel) and in Australian currency the 1949-50 maximum price f.o.b. now becomes approximately 16s. 1d. per bushel and the minimum price approximately 13s. 5d. The net effect of devaluation generally should be to increase the prices obtainable for wheat and flour exported and consequently the overall returns to Australian wheat-growers.

Meat—The Australian export surplus of meat is sold to the United Kingdom under contract. Hence, there will be little alteration in the overall returns to the industry.

Dairy Products—With the exception of a small quantity reserved for Australia's regular or special markets, the whole of the surplus of butter and cheese is sold to the United Kingdom. The prices are fixed by contract and Australia's main competitors, New Zealand and Denmark, have devalued their currencies to the same extent as Australia. There will, therefore, be little change in the return to the dairy industry from sales of butter and cheese, except to the extent that the price of any quantities sold outside the United Kingdom contract may increase. Devaluation should improve the sales position of dried and processed milks, in competition with American supplies, although Australia's principal competitor, the Netherlands, has also devalued its currency.

Probable Improvement in Prices of Dried and Canned Fruits

Fruits—Australia's exports of fruits—fresh, dried and canned—are mainly directed to the United Kingdom and sterling area. It is not expected that prices in these markets will increase to any great extent. However, the prices of Australian dried and canned fruits, which are sold in substantial quantities to Canada, will probably improve, while remaining highly competitive. This year's sales to Canada are practically completed and the fruit shipped. Efforts will be made to promote sales of fresh fruit to the United States to the greatest extent possible.

Metals—The supply position of most Australian metals does not enable this country greatly to expand her exports to the dollar area in the short term. There is little doubt but that devaluation will lift substantially Australian prices for lead, zinc and concentrates in dollar areas. The competitive position of Australia would thereby have been considerably improved, but the new rise in metal prices in sterling areas will have an effect on the position.

Manufactured Goods—The market for textiles will not be greatly affected by devaluation, in view of the competition from other wool manufacturing countries which have also devalued their currencies. In many markets, South America, for example, devaluation will stimulate interest in Australian manufactured goods, including electrical appliances, refrigerators and other metal manufactures.

An undesirable feature of the international position of sterling up to the recent devaluation was the use of discount sterling by currency operators who purchased Australian wool and other products for sterling and subsequently resold them for dollars. Efforts have been made to check this trade, but it has continued in various parts of the sterling area and has caused a loss of dollars to the sterling area dollar pool. Devaluation may be expected to eradicate these currency operations.

Postwar Boom in Australia Ended

The postwar boom in Australia has been halted, this condition having been hastened by the seven-week coal strike that ended on August 15. No business recession is yet perceptible, and prices are still rising, but future trends may well be downward.

Australia had an overall favourable balance of trade for the year ended last June of £131,603,000, compared with £66,904,000 in the preceding twelve-month period. Exports were valued at £545,597,000 and imports at £413,994,000. This country continued to sell more in the United Kingdom than she bought there, though the balance declined this year by over a million pounds to £22,232,000. The trading deficit with North America was £12,519,000, compared with £42,084,000 in the previous year. Converted at the then existing rate of exchange, the overall dollar deficit was equal to approximately $40,060,800.

Australian Trade with North America

	Exports	Imports	Balance
Canada	£ 8,655,000	£11,952,000	—£3,297,000
United States	32,326,000	41,548,000	— 9,222,000

It is interesting to note that, during the first six months of the financial year, the Australian dollar deficit was only £422,000. During the following six months, this increased steadily by £12,097,000. In spite of sharp reductions in dollar imports in June, the deficit for that month was almost as heavy as the average for the previous five months. The same trend was noted in the July statistics, which show a deficit of three million pounds for that month.

Wool exports rose to a peak in May and again in July with the end-of-season rush. Wheat and flour export values also rose to a peak in July, in spite of lower prices. As a whole, export values have been maintained. Base metal prices have recovered steadily since June.

Wool prices reopened firm and high in the new season. It is unlikely, however, that last year's peak prices will again be reached.

Imports declined in value, but the supply position is much easier. Some new rayon textile industries are finding foreign competition embarrassing, and appeals for protection are becoming more common. This trend will increase as world trade returns to normal competitive levels and Australia has to face realities.

New Zealand Invites Tenders for Electrical Hydraulic Equipment

Wellington, November 3, 1949.—(FTS)—The New Zealand State Hydro-Electric Department, Wellington, New Zealand, invites tenders for the following equipment:

Intake gates for the Maraetai Hydro-Electric Power Development under Contract S.M. 845.

Tenders for this contract close with the Stores Manager, Ministry of Works, Government Building, Wellington, New Zealand, on December 6, 1949.

(Editor's Note—Interested Canadian firms may obtain further particulars and specifications from Mr. J. A. Malcolm, New Zealand Government Trade Commissioner, Sun Life Building, Montreal, Quebec.)

Agriculture is Important Factor In National Economy of Belgium

Industry accounts for 20 per cent of country's revenue and provides 20 per cent of foodstuff requirements—Wartime conditions resulted in change in production trends—Self-sufficiency in foodstuffs a chief objective — Government adopts policy of balancing productions by assuring adequate prices to producers.

By J. H. Tremblay, Commercial Secretary (Agricultural Specialist) in Paris.

PARIS, October 2, 1949.—Agriculture in Belgium accounts for 20 per cent of the national revenue, and provides the population with 20 per cent of the foodstuffs required in that country. In view of the fact that it depends to such a material extent on imports to meet the requirements of its people, Belgium was forced during the war to reorient its agriculture, and to concentrate on the production of plant products in preference to livestock. The number of animals decreased substantially, but there has been a marked improvement during the last two years, particularly in the number of hogs and poultry. The re-establishment of herds has been assisted by the lifting of restrictions on feed grain and by a drop in prices for grain.

Belgian Livestock Population

	1929	Average 1941-45	1948	May Census 1949*
Horses	269,792	232,602	253,474	243,882
Cattle	1,672,614	1,674,365	1,715,051	1,876,876
Hogs	993,205	478,759	657,741	1,074,228
Sheep	187,351	220,693	146,637	155,173
Poultry	18,207,522	2,391,972	6,193,084	8,609,135

* Provisional.

The latest, and only prewar, figures available are those for 1929, when the last census was taken. However, they are considered by the Belgian Ministry of Agriculture as fairly representative of those for the years immediately preceding the war, as there was very little change between 1929 and 1939.

An outstanding feature of the foregoing table seems to be the indications of a permanent reduction in the number of horses, undoubtedly due to the large increase in the number of tractors, from 1,500 in 1939 to approximately 3,000 on May 15, 1948, in addition to 1,000 jeeps, and over 500 small motor-activated implements in use on farms.

Large Surplus of Horses at Present

The reduction in the number of horses on farms is much greater than is indicated by the foregoing table, as it is considered that there is a large surplus of horses in Belgium at the present time. A substantial number was shipped to France for human consumption, in addition to the large increase in the number of animals being slaughtered in Belgium for the same purpose in the last few years as compared with the prewar period. In 1948 approximately four and a half times as many horses were slaughtered for human consumption as the annual average for 1936-38.

Although the total number of cattle remained about the same during the war period, the number of milk cows was about 25 per cent less than in 1938, but the proportion of young stock was much greater. It is now considerably higher than before the war, as indicated in the table showing livestock population.

The hog population has also gradually increased, as feeding grain became more readily available, and now stands at a higher level than during the prewar period.

Trend of Field Crops Changed

The field crops production has undergone several modifications during the last ten years, the wheat and potato acreages reached their peak during the war period, while the main objective was to attain the highest possible degree of self-sufficiency in foodstuffs for human consumption. Immediately following the war, these acreages dropped below the prewar level, and it is doubtful, from present indications, if they will reach that level again. The crop of oats, which is the principal grain used for feeding livestock, followed the trend of livestock production during the war and was reduced by approximately 38 per cent, but in contrast with the wheat and potato crops, since the end of the war there seems to be a tendency toward increased production, even above the prewar level. Barley production has also increased considerably.

Other crops that are increasing in importance are sugar beets, mangels, flax and oil plants, as illustrated in the following tables:

Acreage of Principal Crops

(In thousand hectares; 1 hectare equals 2.47 acres)

	Average 1936-38	Average 1941-45	1947	1948	May Census 1949*
Wheat	172	188	77	143	153
Rye	154	135	85	86	95
Oats	213	146	230	189	174
Barley	32	38	69	57	49
Sugar beets	48	52	52	45	60
Flax	29	15	28	30	26
Mangels	83	74	87	81	74
Potatoes	103	107	84	88	89
Colza	0.051	14	1.5	2	4

* Provisional.

Total Crop Production

(In thousand metric tons)

	Average 1936-38	1942-46	1947	1948	May Estimate 1949
Wheat	470	421	122	344	531
Rye	362	267	162	184	238
Oats	565	353	509	385	522
Barley	85	88	168	123	156
Sugar beets	1,356	1,483	1,106	1,598	....
Flax	165	101	113	162	158
Mangels	5,291	4,390	3,459	6,224	....
Potatoes	2,255	1,851	1,600	2,133	....
Colza	0.091	18	2.8	3.6	8

The whole government policy aims at keeping a proper balance between the various farm productions by assuring adequate prices to producers.

With its large number of small holdings (the average size of which for the whole country is 6 hectares, or 15 acres) and intensive cultivation, it is essential to prevent competition between the larger holdings and smaller ones in the same type of production. For this reason the government tries to maintain minimum acreages for the two basic crops, wheat and sugar beets, on the larger farms by regulating prices. For the years 1948 and 1949 a guaranteed price of 430 francs per 100 kilos ($2.68 per bushel) is established for wheat. Although this is higher than the world market price, no government subsidy is required, as the domestic wheat must be mixed with imported wheat by the miller, and the difference is paid by the flour consumer.

With regard to the sugar beets, the price is based on the world price of sugar, plus 300 francs per 100 kilos (Benelux customs duty).

The smaller farms specialize mostly in dairy and meat production, which is found most profitable. While these animal products are not generally subject to set prices, the price of butter has been regulated and stabilized to a certain extent by a government import policy. In accordance with this policy, producers are permitted to place periodically on the local market, where the stocks become low, imported butter at 80 francs per kilo (83 cents Canadian per pound). This policy resulted in stabilizing the price of domestic butter also at about 80 francs per kilo, but it is likely to be abandoned shortly.

The following table is indicative of the general trend in agricultural prices. It will be noted that prices of hay, grain and vegetable products, with the exception of the wheat price, which is pegged, have dropped substantially. Prices of animal and dairy products, on the other hand, show little change with the exception of that for eggs.

Trend of Agricultural Prices

	1948	January 1949	February 1949	March 1949	April 1949
		(Francs per 100 Kilos)			
Grain, Vegetables and Hay—					
Wheat	430.00	430.00	430.00	430.00	430.00
Rye	393.40	359.01	337.70	319.55	321.84
Summer barley	384.85	386.09	365.42	325.26	337.81
Oats	409.45	343.67	312.57	295.85	301.60
Potatoes	174.96	116.63	116.76	136.49	149.57
Sugar beets	42.76	25.63	23.00	22.43	24.55
Mangels	36.19	22.32	19.78	17.78	20.69
Meadow hay	195.35	148.62	158.44	155.09	162.97
Clover hay	252.77	148.61	184.48	179.81	136.88
Alfalfa hay	278.87	166.11	192.67	189.46	226.15
Livestock—					
Steers	26.84	28.25	26.06	24.80	27.56
Heifers	26.67	27.25	25.19	24.40	26.06
Cows	22.65	21.75	19.75	18.50	19.50
Bulls	22.97	23.75	21.63	20.00	22.56
Veal	32.34	45.75	41.75	39.40	34.50
Pork	43.59	39.63	33.50	28.00	24.50
Mutton	16.59	14.50	16.00	14.80	14.63
Horses	16.07	14.00	15.75	16.20	16.50
Dairy Products and Eggs—					
Dairy butter	84.53	89.65	83.61	80.00	80.41
Farm butter	83.75	86.51	82.64	79.55	76.68
Eggs (each)	3.06	2.10	1.87	1.71	1.73
Milk—3 francs per liter to the producer.					

Furniture Manufacture in Canada Increased

The gross factory selling value of products turned out by the furniture industry of Canada was $126,199,000 in 1947, showing an increase of 19 per cent over the preceding year. The value of living-room furniture manufactured—including upholstered living-room furniture and studio couches—totalled $27,779,000 as against $24,344,000, while the value of bedroom furniture was $22,221,000 compared with $17,842,000. The value of mattresses and springs manufactured was $10,935,000 as against $8,689,000. —(*Dominion Bureau of Statistics, November 3, 1949*)

Sugar Output of Jamaica Rises, But Banana Production Down

Disease and hurricanes responsible for decline in exports of bananas from peak of 26,955,000 stems in 1937 to 5,520,000 stems in 1947—Sugar and rum shipments show substantial increase—Tourist industry most important dollar earner—Total of 53,740 visitors in 1947.

By M. B. Palmer, Canadian Government Trade Commissioner

KINGSTON, October 3, 1949.—Agriculture is the basis upon which the economy of Jamaica has been established. The value of agricultural exports rose substantially during the past ten years, markets for the principal products of this island having been assured on a contract basis with the British Ministry of Food. The International Sugar Agreement was suspended during this period, and several associations were formed to promote the sale of certain products, such as bananas, sugar cane, citrus fruit, honey and livestock. Attempts were made to increase the domestic production of foodstuffs, and land settlement of small farmers made considerable progress. Some setbacks have been experienced, due to disease, drought and hurricanes, necessitating readjustments and recovery efforts, but satisfactory progress has been achieved.

Expansion in the production of sugar and contraction in the cultivation of bananas are the outstanding developments in the last ten years. Jamaica was perhaps the leading banana producer in the middle 'thirties, and exports established a record of 27,000,000 stems in 1937. Since then, Leaf Spot and Panama Disease, together with the hurricanes in 1939 and 1944, have severely affected the annual output of bananas. Research has resulted in the development of an immune variety, *Lacatan,* to replace the *Gros Michel,* and it is estimated that 12,000,000 stems will be marketed by 1952.

Both production and exports of the sugar industry have greatly expanded. At present 24 factories operate in the island, with a total capacity of from 275,000 to 300,000 tons, while a new factory is under construction, capable of producing 75,000 tons per annum. Sugar output was 118,000 tons in 1939, 193,000 tons in 1948, and, according to the latest figures, 237,000 tons for 1949. The present export price is £26 f.o.b. per ton, less £2 5s. towards the Sugar Reserve Fund, and the Imperial Government has undertaken to purchase all sugar produced locally up to 1952, on a year to year price-contract basis.

The livestock and dairy industries have continued to expand. This is partly indicated by increased sales of liquid milk to the Island's only condensary, and the output of condensed milk, the figures being 36,000 cases for 1940 and 189,000 for 1947.

Jamaica's exports are, in the main, agricultural, or closely related to that industry, as in the case of sugar and rum. The Island's exports

Jamaican Exports of Sugar, Rum and Bananas

Commodity	1937 Quantity	1937 Value	1940 Quantity	1940 Value	1947 Quantity	1947 Value
	Tons		Tons		Tons	
Sugar	96,000	£ 865,000	81,000	£ 848,000	128,000	£2,656,000
	Gallons		Gallons		Gallons	
Rum	904,000	266,000	1,066,000	338,000	2,306,000	2,570,000
	Stems		Stems		Stems	
Bananas	26,955,000	2,657,000	6,849,000	1,045,000	5,520,000	2,049,000

Jamaica—Bananas, aboard ship, bound for Canada. Exports from Jamaica have declined from a peak of 27,000,000 stems in 1937 to 5,520,000 stems in 1947, due to disease, drought and hurricanes. Sugar shipments have increased substantially.

were dominated by bananas, sugar and rum, in that order, until 1941, when the order was changed to sugar, rum, and bananas.

Other important items of export, which showed increases over the ten-year period were pimento, citrus fruit and ginger. An important advance was in the export of cigars, from 38,000 pounds at £21,000 in 1937, to 696,000 pounds at £906,000 in 1947.

Imports consist almost entirely of food and manufactured articles. Greatest expenditure was on rice, flour, dried salted fish, apparel, motor vehicles and parts and gasoline.

Import and Export Values Increased

Both import and export values rose over the period, import prices having risen more steeply than those of exports. Trade tonnages were less for 1947 than for 1938, though values were considerably higher. Wartime and postwar shortages are responsible for the tonnage situation, especially in shipping, and inflation for higher values. The two indexes show deterioration of the purchasing power of Jamaica's exports on foreign markets, or, in other words, that a given quantity of Jamaican exports could buy less from abroad in 1947 than in 1938. The overall movement has been against the exporter of relatively primary produce, and in favour of the exporter of items of secondary production.

The majority of trade is with the United Kingdom, and business with that country has increased in value between 1938 and 1947. Trade with the United States and Canada has been characterized by a general stability of exports, but a rapid climb in imports.

Foreign Trade of Jamaica

	Imports			Exports		
	Tons		Price index	Tons		Price index
1938	536,000	£ 6,485,000	100	575,000	£4,926,000	100
1941	484,000	6,517,000	128	346,000	3,801,000	144
1944	366,000	8,973,000	228	201,000	4,342,000	204
1947	438,000	18,943,000	324	308,000	9,939,000	291

Trade of Jamaica, by Main Countries

	1938	1941	1945	1947
		('000)		
All Countries:				
Imports	£ 6,485	£ 6,517	£ 9,596	£18,943
Exports (total)	5,033	3,967	4,959	10,171
Balance	— 1,452	— 2,550	— 4,637	— 8,772
United Kingdom:				
Imports	2,109	1,788	1,326	3,796
Exports (total)	2,939	1,480	2,233	7,905
Balance	+ 830	— 308	+ 907	+ 4,109
Canada:				
Imports	1,014	2,109	3,943	5,410
Exports (total)	1,316	1,386	1,677	1,262
Balance	+ 302	— 723	— 2,266	— 4,148
United States:				
Imports	1,359	869	2,887	6,378
Exports (total)	203	776	564	310
Balance	— 1,156	— 93	— 2,323	— 6,068

Adverse Balance on Commodity Trade Increased

Exports were consistently below imports, the negative balance on commodity trade ranging from £1,452,000 in 1938 to £8,772,000 in 1947. It will be noticed that the balance was generally favourable with the United Kingdom, but progressively unfavourable with the dollar countries. The Island's trade problem is one of dollars, mitigated over the years by import restrictions, tourist revenue, and workers' remittances. Revenue from farm labourers (Jamaican workers engaged on contract to work in the United States of America), totalled £9,379,000 over the period from 1943 to 1947, the annual maximum being £3,770,000 in 1945. The dollar deficit for 1947 was about $34,000,000, but was reduced to approximately $21,000,000 for 1948.

Imports into Jamaica

	1939	1947
Rice	£ 166,000	£ 369,000
Flour	439,000	1,975,000
Dried salted fish	203,000	565,000
Apparel	1,090,000	3,323,000
Motor vehicles, gasoline and parts	479,000	1,650,000
Total	£2,377,000	£7,882,000
Percent of total imports	36.5	41.6

Rehabilitation and Agricultural Expansion Under Way

Rehabilitation and expansion are under way for many crops. At the present time, coffee seedlings are being planted at the rate of around 100,000 per annum, cocoa planting is being extended at the rate of 500 acres per annum, and coconut acreage lost in 1944 has been more than regained. The tomato industry has been developing steadily, while it is hoped to plant about 1,000,000 budded citrus plants over the 1948-54 period.

Apart from the foregoing, it is worth recording that imports of agricultural machinery rose from £133,600 in 1937 to £455,900 in 1947. This rise in value is, of course, influenced by increased prices. Electricity generated for agriculture moved upwards from 2·55 million k.w.h. in 1937 to 11·9 million k.w.h. in 1947, most of which was used for irrigation purposes.

From 1939 to 1948, a substantial rise in the level of industrial activity has taken place. Reasons for this have been wartime shortages on the one hand and, on the other, an increase in enterprise and the influx of foreign capital. Above all has been the realization that the development of secondary industry will mean a more balanced economy, more employment, especially of a non-casual nature, and a greater income, leading to a higher average of living standards. This trend is illustrated by the following figures:

Industrial Expansion in Jamaica

	New companies registered	Net new capital	Electricity generated for industry k.w.h.	Workers in factories and workshops
1939	39	£109,000	4,323,000	8,840
1942	26	£220,000	6,983,000	12,600
1947	69	£914,000	9,083,000	20,123
1948	95	......	......	66,000 (est.)

Both an overall increase in production and a widening of the range of commodities have taken place. Developments have occurred in the canning, confectionery, containers, cosmetics, food yeast, footwear, gypsum and sisal industries. There are prospects for the manufacture of bauxite, textiles, buttons and cement; Jamaica may have a film-producing industry, and the sugar industry has become interested in sugar by-products, particularly pure alcohol. The government will presently erect a pilot canning plant with an estimated capacity of 25,000 cases of 24 pint-sized tins. Worthy of mention is the fact that, to date, some 80 types have been canned successfully at the government canning research station, 25 of which appear to be commercially feasible, considering the supply factor.

Financing Concerns Established

A development of another type has been the emergence of organizations like Barclays Overseas Development Corporation, and the Colonial Development Corporation, both financing concerns, and the second also a direct investment concern. It is to be noted, in addition, that the commercial banks are taking a greater interest in local investment.

Still another development has been the Pioneer Industries (Encouragement) Law, which can be interpreted as an unambiguous statement of government policy with regard to industrial development. This law affords income tax and import duty concessions to "pioneer" investors. At the same time, the government is preparing for the provision of trading estate facilities on the reclaimed lands at Western Kingston.

Air traffic increased greatly during the period. Nine airlines now operate in Jamaica, as opposed to one in 1937. During 1939, only 447 aircraft landed in the Island, while during 1947 there were 4,128.

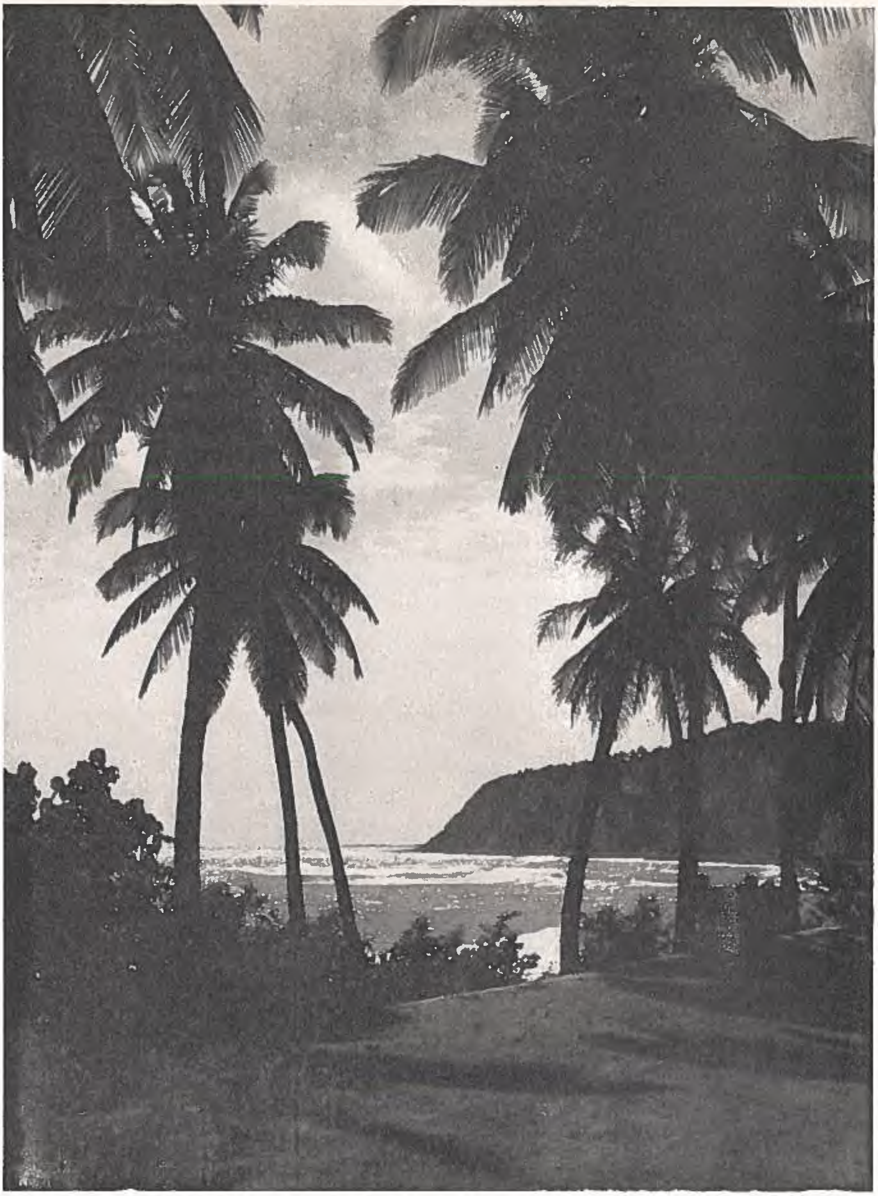
This development is important for three reasons. Firstly, it came at a time when wartime conditions had reduced passenger shipping space to and from the Island to the barest minimum. Secondly, it has considerally speeded up passenger and mail transfer between Jamaica and the outside world. Thirdly, inter-Caribbean air service has greatly improved space-time relationships within the area, a matter of historical significance for the B.W.I. The amount of territory that can be efficiently incorporated into a single political unit is closely related to communications. To date, for reasons largely economic, no fluid system of surface transport has developed for the area, and it is doubtful if any will ever appear. It follows, therefore, that the federation of the British Caribbean could become a real possibility only after the difficulty of their geographical distribution had been overcome by inter-territorial air traffic.

Tourist Industry is Main Dollar Earner

The tourist industry is Jamaica's most important dollar earning industry. Exports to Canada and the United States totalled £1,529,000 in 1947, approximately ($6,000,000) the greatest contributors being sugar and rum, valued at about $5,000,000. During 1947, the Island received 53,740 visitors, who, averaging between £25 and £30 per head, earned about $6,000,000 for Jamaica. For that year, the dollar intake of the tourist industry equalled that of the Island's total domestic exports to the United States and Canada, and was well in excess of dollars earned by the entire sugar industry. With no tourist industry in 1947, the dollar deficit would have been nearly $40,000,000, instead of $34,000,000. For 1948 it would have approached $31,000,00, instead of $21,000,000, since the 1948 traffic earned an estimated $10,000,000. The total number of visitors for the first ten months of that year was 51,761. This would indicate a total of 60,000 for the whole year, which probably is less than the prewar high of 65,269 for 1937. However, income from the tourist trade was only £500,000 in the 1937-38 season, during which 80 tourist cruise-ships operated, compared with three cruise services for 1947-48.

The foregoing survey would seem to suggest that economic prospects for Jamaica are reassuring. More industries will develop, greater produce will result, and national income will rise. Development will take place in agriculture, foreign trade will expand, and the tourist industry will continue to be a major factor in the local economy.

On the other hand, one prospect with regard to labour gives less cause for satisfaction. While gross employment continues to increase, it merely keeps pace with population growth at the rate of 23 per cent of population gainfully employed. This is a low figure, comparing unfavourably with, for instance, a Canadian figure of 38 per cent for 1946. If the discrepancy does not appear to be considerable, it must be remembered that the majority percentage of the Jamaica labour force is intermittently employed. In point of fact, of the 284,000 wage-earners disclosed by the 1943 census, some 200,000 were casually employed.



Jamaica—Sandy beaches extend along the north coast of this island, attracting visitors who contribute the largest part of its dollar earnings.
Photo by B. Matthews.

The problem for Jamaica resolves itself into two considerations. The first is the increase of the proportion of the wage-earning group, by the provision of more jobs. The second, provision of as many new jobs as possible of a non-casual nature. It follows, then, that all programs or projects for development must be measured, not in terms of development for its own sake, or in terms of the desirability of a particular line of development, but in terms of the numbers of jobs it will provide.

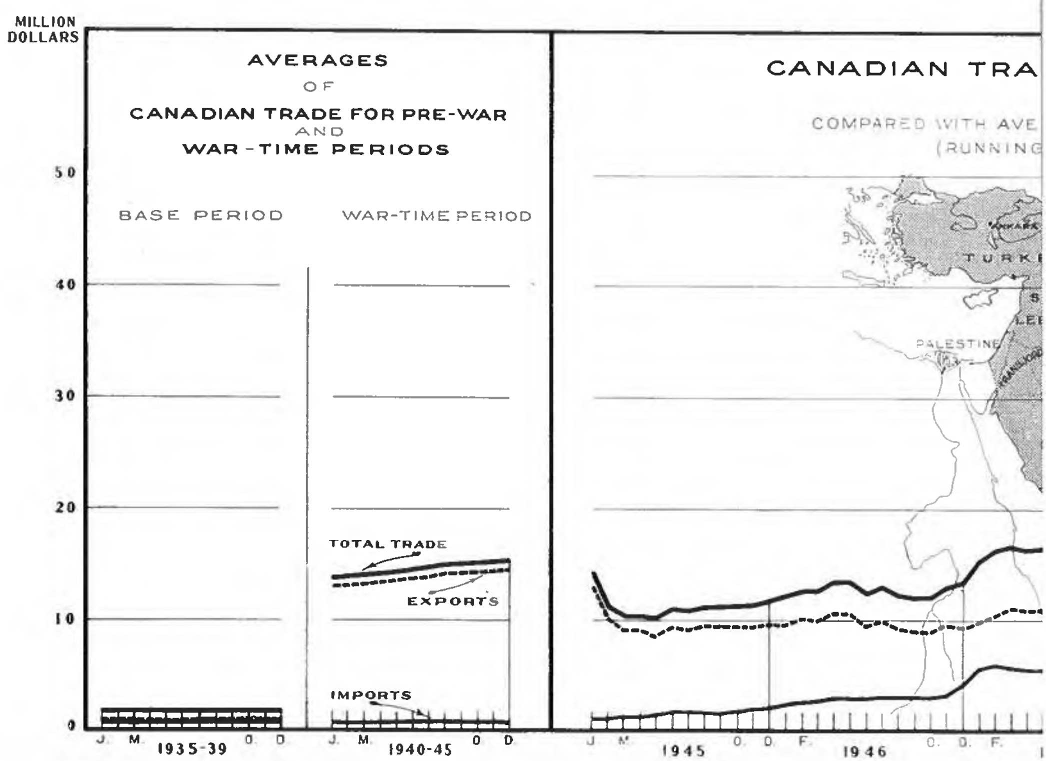
In the final analysis, the economic progress of the Island must, for some time, be reckoned in terms of the rise or fall of the employment-percentage level.

Canadian Trade w

Canadian Exports

(Twelve Months Ended)

Country	August					
	Average 1935-39		1948		1949	
	Value $'000	Per cent	Value $'000	Per cent	Value $'000	Per cent
Aden	104	10·6	1,712	13·1	1,750	5·2
Iran	101	10·3	604	4·6	2,655	7·8
Iraq	64	6·6	1,157	8·9	535	1·6
Palestine	238	24·4	5,713	43·7	8,259	24·4
Syria and Lebanon	82	8·4	1,626	12·4	8,492	25·0
Transjordan	Nil	—	Nil	—	168	0·5
Turkey	388	39·7	2,254	17·3	12,046	35·5
Total	977	100·0	13,065	100·0	33,905	100·0



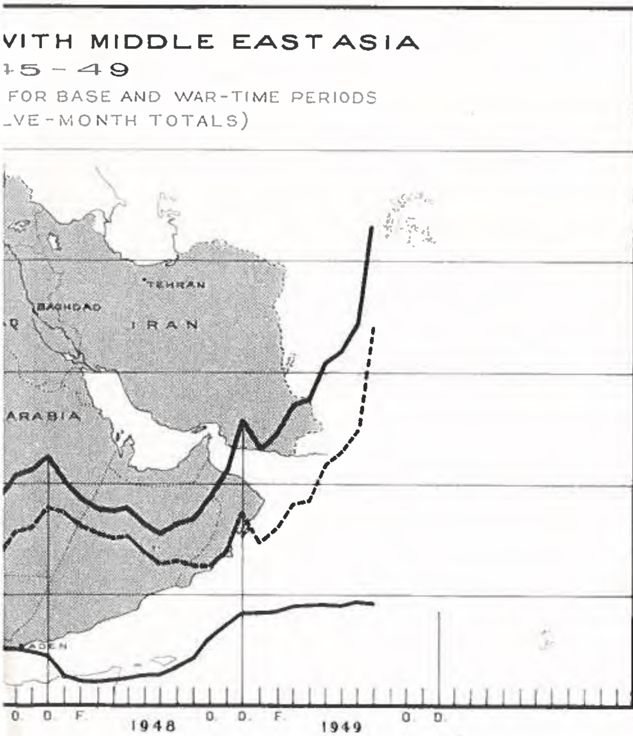
Middle East Asia

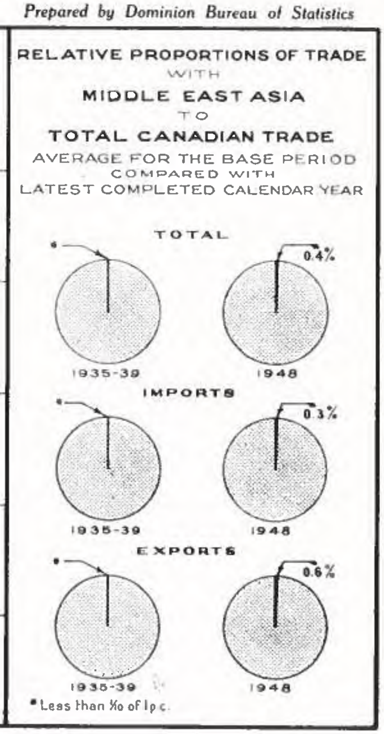
Canadian Imports

(Twelve Months Ended)

Country	August					
	Average 1935-39		1948		1949	
	Value $'000	Per cent	Value $'000	Per cent	Value $'000	Per cent
Aden	4	0·5	918	26·2	5,496	59·3
Iran	130	16·2	123	3·5	1,098	11·9
Iraq	313	39·1	1,365	39·0	520	5·6
Palestine	68	8·5	36	1·0	288	3·1
Syria and Lebanon	6	0·7	28	0·8	428	4·6
Transjordan	Nil	—	Nil	—	Nil	—
Turkey	280	35·0	1,030	29·4	1,432	15·5
TOTAL	801	100·0	3,500	100·0	9,263	100·0

Prepared by Dominion Bureau of Statistics





Italy Requires Large Imports of Lumber for Building Purposes

More than one-third of prewar purchases obtained from neighbouring countries—Canada and the United States supplied lumber for relief projects following the war—Austria and Yugoslavia are main sources of supply.

By A. P. Bissonnet, Assistant Commercial Secretary for Canada

ROME, September 6, 1949.—Italy imports more than one-third of her lumber requirements, especially softwood, the largest proportion of which is obtained from Austria and Yugoslavia. Until 1934, about 80 per cent of the lumber imported by Italy was obtained from these two countries, but Roumania then entered the field in direct competition with Austria. The forest reserves of this country were steadily depleted, following the inauguration by Mussolini of an austerity program in 1935, imports being progressively reduced. This, together with the destruction of timber during the war, involves the importation at this time of large quantities of lumber, mainly for construction purposes.

Canada and the United States supplied a large amount of lumber for relief projects, following the war, but the period was abnormal, and there was an urgent need for lumber. It will be noted from the following table that Austria and Yugoslavia have regained their prewar positions as the principle sources of supply. Apart from the geographical advantages, the compensation agreements between those two countries and Italy foster

Rome—Terminus station is nearing completion. Thousands of pilgrims are expected to visit Rome during the Holy Year.

the exchange of lumber for textiles and other manufactures they require. Approximately 98 per cent of Austria's exports of softwood are sawn, whereas hardwood obtained from Yugoslavia arrives in the form of logs.

Italian Production of Lumber, 1947-48

	Softwood		Hardwood	
	1948	Jan.-Mar., 1949	1948	Jan.-Mar., 1949
	Cubic Metres		Cubic Metres	
Total	372,961	176,432	77,866	54,246
Austria	233,144	141,403	51	234
Czechoslovakia	47,829	1,024	1,756	....
Germany	29,322	11,995	....	....
Yugoslavia	35,745	14,856	61,876	51,338
Switzerland	9,127	2,346	232	....
Canada	19	....	25	....
United States	15,772	1,947	7,057	642

One cubic meter equals 423.7 f.b.m.

Local Production

Although imports now account for an important part of Italy's total lumber requirements, they would increase considerably if exchange restrictions were eased and a more active building program were in force. It is estimated that 3,000,000 cubic metres of sawn lumber are being used annually in Italy for construction and other purposes. The following table shows national production of all lumber (including quantities for construction, firewood and other uses) during the period July 1, 1947, to June 30, 1948:

Italian Production of Lumber, 1947-48

	Softwood	Hardwood
	Cubic Metres	
Total	2,332,071	13,100,145
Saw-logs and logs for plywood	1,231,063	1,040,699
Hewn wood	166,093	31,038
Railway ties	10,502*	374,880†
Pitprops	97,321	32,774
Posts, poles, pilings	125,702	270,792
Staves for barrels	1,964	128,638
Pulpwood	94,126	127,059
Tanning wood	......	253,184
Wood for charcoal	30,814	3,766,405
Fuel wood	534,935	6,770,007
All others	39,551	304,669

* Of which 445 cubic metres were produced in sawmills and should therefore come under sawlogs.

† Of which 23,151 cubic metres were produced in sawmills and should therefore come under sawlogs.

Domestic lumber production is centred mostly in two areas in Italy: the sub-Alpine Trento district and the Silan Plain in the south. The foregoing figures, showing a total annual production of 15,400,000 cubic metres, equal the maximum prewar production figure of 1939-40. However, in 1934, which is regarded as a normal year, production was about 13,000,000 cubic metres.

Requirements Comprise Both Softwoods and Hardwoods

Approximately 85 per cent of Italy's imports in prewar years were softwoods, and 15 to 20 per cent hardwoods. Of the total imports, about 130,000 cubic metres came from North America. From Canada, Italy obtained principally Douglas fir, both sawn and in logs, sawn silver spruce, and beach logs. The silver spruce was used in the construction of aircraft, but there is no demand for it now owing to inactivity of the Italian aircraft industry.

Italy's 1949 import requirements have been estimated at 769,500 cubic metres of softwood and 114,000 cubic metres of hardwood. It is estimated by the local Lumber Importers Association that about 83 per cent of this will be supplied by Austria, Yugoslavia and Russia. Most of the remainder will be supplied by other European countries as a result of compensation agreements and geographical proximity. The United States will probably supply approximately 25,000 cubic metres of softwood and 5,000 cubic metres of hardwood, while 5,000 cubic metres of softwood and 2,000 cubic metres of hardwood will come from Canada.

Two recent developments have taken place which have a direct bearing on imports of lumber from Canada: (1) Since the first quarter of 1949, lumber from both the United States and Canada has not been included in Italy's E.R.P. program and therefore must be paid for out of dollar proceeds from Italian exports; (2) the E.C.A., on April 29, announced a new policy whereby participating countries desiring to purchase lumber or lumber products for dollars must canvass all dollar sources, including the United States, to ensure that they are obtaining supplies at the lowest possible prices.

Demand for Construction Purposes Reduced

Generally speaking, lumber in Italy is used less for building construction than in other European countries, and less is now used for this purpose than was normally used prior to the war. There is a natural preference for rough sawn timber, since there is a well-developed sawmill industry in Italy.

More specifically the market for Canadian lumber in Italy at present calls mostly for Douglas fir clear flitches, but there is also a demand for beech logs for the plywood industry. Middle-grade lumber can be obtained from local or nearby sources, but high-grade lumber, which cannot be obtained locally, is consequently able to compete. When high-grade lumber is imported it is generally converted for special use, such as decking, or for furniture, panelling, etc.

Lumber is imported into Italy almost invariably through established agents. However, this method is not clear cut, and the trade is not bound by hard and fast rules such as obtain in the United Kingdom. The small quantities needed by the end-users precludes the possibility of selling direct to users except in unusual circumstances.

Domestic Plywood Made from Poplar Logs

Italy has its own plywood industry, based principally on the use of poplar logs. In this field there is a possibility of selling maple, birch and beech logs from Canada if the landed price is low enough to compete with supplies from other sources, but difficulties of securing exchange must be taken into account. Canadian plywood could be sold in small quantities and when there is a particular demand for a certain specification. In general, imported plywood is too expensive for Italian users, the local product being mostly of 3 mm. thickness. This is especially true of plywood used in the south. In the north of Italy, however, thicker types, of 4, 5, or 6 mm. (all thicknesses being 3-ply) are preferred.

Italian import requirements in railway sleepers, poles, pitprops, etc., are being supplied mostly from Central Europe. Czechoslovakia is the source of large imports of pine poles which are creosoted in Italy where there are ample facilities for that process.

Railway sleepers are being imported from Yugoslavia and are mostly of birch. It is estimated that Italy has sufficient stocks of hardwood ties to last for some time.

Monthly Summary of Foreign Trade

Canadian Exports (Excluding Gold)

Months	Average 1935-39	1938	1944	1945	1946	1947	1948	1949
	(Millions of Dollars)							
January	62·8	70·3	242·0	230·5	189·1	208·6	235·4	237·0
February	57·4	59·6	227·2	236·4	153·1	179·5	208·3	205·0
March	71·1	73·3	282·7	301·2	178·4	209·0	228·4	216·8
April	48·5	50·9	282·9	312·3	178·5	190·9	212·3	237·8
May	75·6	67·0	368·4	315·2	197·0	267·8	282·3	272·9
June	73·3	66·0	343·2	322·8	166·7	272·7	233·5	255·1
July	74·4	66·2	278·7	282·7	188·7	236·6	250·9	241·3
August	77·1	69·1	257·0	295·0	242·7	221·3	224·1	251·7
September	76·8	72·2	264·6	220·8	169·8	218·6	283·0	228·4
October	91·3	88·2	314·0	227·9	204·2	250·8	307·0	....
November	95·0	86·0	312·5	238·6	232·2	253·1	293·9	....
December	81·3	68·9	266·9	234·8	211·9	266·2	316·4	....
Total	884·5	837·6	3,440·0	3,218·3	2,312·2	2,774·9	3,075·4	2,146·0

Canadian Imports (Excluding Gold)

Months	Average 1935-39	1938	1944	1945	1946	1947	1948	1949
	(Millions of Dollars)							
January	44·6	49·7	126·4	129·7	140·3	173·8	206·1	223·8
February	42·9	47·0	138·4	112·4	117·0	177·1	182·2	206·0
March	59·1	65·1	150·8	132·5	139·9	208·9	197·1	235·9
April	45·3	48·9	137·5	133·8	160·8	225·6	226·7	242·7
May	66·1	67·1	159·0	143·8	164·2	240·3	225·1	250·5
June	60·5	58·9	152·5	146·5	157·7	231·1	233·0	250·5
July	57·6	55·8	148·5	138·7	161·6	226·8	225·1	230·9
August	57·9	57·0	157·3	128·1	163·2	204·6	206·5	212·1
September	59·6	56·4	159·7	122·3	156·1	208·1	221·7	221.6
October	68·6	63·9	160·1	134·4	186·4	254·5	243·4	....
November	70·1	63·3	141·6	142·4	198·2	229·1	238·2	....
December	52·2	44·3	127·2	121·2	181·9	194·2	232·0	....
Total	684·6	677·5	1,758·9	1,585·8	1,927·3	2,573·9	2,636·9	2,073.9

Balance of Trade with all Countries (Excluding Gold)

Months	Average 1935-39	1938	1944	1945	1946	1947	1948	1949
	(Millions of Dollars)							
January	+ 19·0	+ 21·8	+ 119·6	+ 104·2	+ 51·0	+ 36·7	+ 33·0	+ 15·2
February	+ 15·3	+ 13·5	+ 90·9	+ 128·0	+ 37·7	+ 4·7	+ 28·1	+ 1·2
March	+ 13·0	+ 9·2	+ 139·2	+ 174·5	+ 40·0	+ 3·0	+ 33·9	− 16·9
April	+ 4·0	+ 2·6	+ 149·2	+ 184·3	+ 19·5	− 32·2	− 11·6	− 2·4
May	+ 10·6	+ 0·8	+ 211·8	+ 174·9	+ 34·6	+ 30·9	+ 62·4	+ 25·1
June	+ 13·8	+ 7·9	+ 193·5	+ 180·7	+ 11·1	+ 45·3	+ 3·0	+ 6·9
July	+ 17·9	+ 11·4	+ 133·3	+ 147·4	+ 29·6	+ 12·8	+ 28·4	+ 12·8
August	+ 20·3	+ 12·9	+ 101·9	+ 172·5	+ 82·8	+ 20·3	+ 20·0	+ 41·9
September	+ 18·3	+ 16·7	+ 107·6	+ 102·7	+ 15·8	+ 13·4	+ 64·4	+ 9.4
October	+ 23·8	+ 25·3	+ 158·4	+ 98·5	+ 20·2	− 0·8	+ 66·0	....
November	+ 26·2	+ 23·5	+ 175·9	+ 98·8	+ 37·0	+ 26·9	+ 58·2	....
December	+ 30·3	+ 25·6	+ 142·9	+ 115·2	+ 32·4	+ 76·7	+ 87·3	....
Total	+ 212·5	+ 171·2	+1,724·2	+1,681·6	+ 411·9	+ 237·8	+ 473·1	+ 93.1

NOTE.—Throughout this bulletin, totals represent unrounded figures, hence may vary slightly from rounded amounts. The value of "Foreign Exports" is not included under the tabular heading "Canadian Exports", for which reason figures showing the balance of trade do not represent the difference between those for export and imports.

Canadian Exports to the United Kingdom (Excluding Gold)

Months	Average 1935-39	1938	1944	1945	1946	1947	1948	1949
	(Millions of Dollars)							
January	25·5	33·6	94·8	83·2	51·1	50·5	64·9	55·8
February	23·6	27·3	78·2	67·5	37·9	44·9	51·7	44·1
March	26·4	27·8	110·4	108·8	50·5	47·6	59·2	39·5
April	16·4	18·8	101·2	109·1	41·0	43·1	44·4	63·0
May	30·5	27·9	140·2	115·6	54·9	90·5	85·1	72·4
June	28·9	25·6	127·9	94·6	30·6	76·2	54·2	60·7
July	30·5	25·8	104·9	83·9	40·4	69·4	56·3	70·6
August	31·3	26·7	90·2	66·6	71·9	66·0	52·5	62·9
September	30·8	28·9	94·4	58·8	54·3	54·5	47·9	56·9
October	38·4	36·0	112·6	56·3	47·7	66·8	65·6	....
November	41·4	35·8	102·2	52·4	57·9	69·3	56·7	....
December	30·0	25·5	77·9	66·4	59·4	72·5	48·5	....
Total	353·6	339·7	1,235·0	963·2	597·5	751·2	686·9	526·0

Canadian Imports from the United Kingdom (Excluding Gold)

Months	Average 1935-39	1938	1944	1945	1946	1947	1948	1949
	(Millions of Dollars)							
January	8·0	8·9	7·1	9·4	20·1	14·3	21·6	25·4
February	8·1	8·8	6·7	6·7	13·0	10·5	17·9	22·9
March	10·9	11·5	9·8	9·3	14·4	13·8	21·6	28·3
April	8·4	9·2	8·4	12·0	21·2	12·7	24·6	30·1
May	12·7	11·9	13·0	15·2	18·8	15·2	27·4	29·5
June	10·8	9·2	9·4	13·8	23·4	18·1	26·0	27·0
July	11·3	9·7	5·9	12·0	21·9	17·7	29·4	29·4
August	11·4	10·4	4·6	10·7	14·5	15·1	24·7	26·2
September	10·5	10·0	7·1	9·6	12·0	15·6	24·1	21·9
October	11·0	11·6	18·1	12·1	15·6	18·3	29·3	....
November	13·0	11·0	11·1	14·8	14·9	17·8	28·3	....
December	8·0	7·0	9·4	14·9	11·7	20·3	24·6	....
Total	124·0	119·3	110·6	140·5	201·4	189·4	299·5	240·7

Balance of Trade with the United Kingdom (Excluding Gold)

Months	Average 1935-39	1938	1944	1945	1946	1947	1948	1949
	(Millions of Dollars)							
January	+ 17·7	+ 24·8	+ 88·2	+ 74·5	+ 31·2	+ 36·3	+ 43·4	+ 30·5
February	+ 14·6	+ 18·7	+ 72·0	+ 61·4	+ 24·9	+ 34·5	+ 33·9	+ 21·4
March	+ 15·6	+ 16·4	+ 100·7	+ 101·5	+ 36·2	+ 33·9	+ 37·7	+ 11·3
April	+ 9·1	+ 9·6	+ 93·0	+ 98·9	+ 19·8	+ 30·4	+ 19·8	+ 33·4
May	+ 17·7	+ 16·2	+ 127·3	+ 101·1	+ 36·2	+ 75·6	+ 57·8	+ 43·4
June	+ 18·3	+ 16·6	+ 118·6	+ 81·3	+ 7·3	+ 58·2	+ 28·3	+ 34·1
July	+ 19·4	+ 16·3	+ 99·3	+ 72·2	+ 18·6	+ 52·0	+ 27·1	+ 41·7
August	+ 20·0	+ 16·5	+ 85·7	+ 56·8	+ 57·5	+ 51·1	+ 27·9	+ 37·1
September	+ 20·3	+ 19·0	+ 87·7	+ 49·2	+ 42·4	+ 39·4	+ 24·1	+ 35·5
October	+ 27·5	+ 24·6	+ 94·9	+ 44·8	+ 32·1	+ 48·7	+ 36·5	....
November	+ 28·4	+ 24·8	+ 91·3	+ 37·7	+ 43·3	+ 51·6	+ 28·6	....
December	+ 22·1	+ 18·6	+ 68·7	+ 51·6	+ 47·8	+ 52·5	+ 24·0	....
Total	+ 230·8	+ 222·1	+1,127·5	+ 830·9	+ 397·4	+ 564·3	+ 389·2	+ 288·4

Canadian Exports to the United States (Excluding Gold)

(Millions of Dollars)

Months	Average 1935-39	1938	1944	1945	1946	1947	1948	1939
January	22·1	20·0	85·3	84·7	62·3	79·5	105·0	116·0
February	19·7	16·8	91·6	91·5	57·6	69·4	94·8	106·7
March	25·9	22·7	97·4	103·3	66·5	83·1	112·5	122·4
April	20·1	18·0	120·3	109·1	71·4	88·3	109·2	110·7
May	26·1	20·4	131·9	117·2	72·2	79·8	114·7	121·2
June	25·1	20·0	111·2	112·3	66·5	82·0	109·8	113·9
July	25·9	21·0	98·8	102·7	74·8	82·1	118·9	104·4
August	28·3	25·3	86·0	112·6	75·0	81·4	114·0	115·4
September	29·4	25·1	110·5	84·8	69·6	87·5	162·0	113·7
October	33·5	28·0	123·0	88·4	99·1	102·4	148·9	....
November	31·9	28·4	118·9	101·2	89·2	92·9	163·3	....
December	33·3	24·7	126·4	88·9	83·9	106·0	147·8	....
Total	321·3	270·5	1,301·3	1,197·0	887·9	1,034·2	1,501·0	1,024·3

Canadian Imports from the United States (Excluding Gold)

(Millions of Dollars)

Months	Average 1935-39	1938	1944	1945	1946	1947	1948	1949
January	28·7	32·3	106·3	101·8	97·4	136·4	150·0	164·8
February	27·9	31·2	115·8	92·8	86·0	138·4	136·8	148·8
March	38·0	42·9	123·3	105·3	100·1	165·1	138·3	169·0
April	29·2	31·4	114·4	102·7	114·8	181·6	159·5	177·3
May	38·3	40·5	127·0	104·8	113·4	184·7	145·0	172·1
June	36·4	37·1	122·2	110·7	106·6	174·7	154·9	176·9
July	33·4	34·1	124·0	103·5	112·5	168·9	149·5	160·3
August	33·7	35·3	138·3	96·8	123·1	155·3	136·1	143·6
September	36·2	34·7	135·6	89·6	115·8	163·0	152·7	158·0
October	42·5	38·5	121·4	101·3	140·4	190·4	160·2	....
November	40·8	37·6	116·1	103·3	149·5	174·4	163·4	....
December	33·6	29·2	102·9	89·9	145·6	141·7	159·4	....
Total	418·7	424·7	1,447·2	1,202·4	1,405·3	1,974·7	1,805·8	1,470·6

Balance of Trade with the United States (Excluding Gold)

(Millions of Dollars)

Months	Average 1935-39	1938	1944	1945	1946	1947	1948	1949
January	− 5·9	− 11·3	− 18·3	− 15·0	− 33·2	− 55·8	− 43·2	− 47·3
February	− 7·5	− 13·8	− 22·7	+ 1·9	− 27·1	− 67·1	− 40·4	− 40·6
March	− 10·3	− 19·5	− 19·4	+ 1·7	− 32·4	− 80·2	− 24·2	− 44·9
April	− 8·4	− 12·8	+ 9·0	+ 10·1	− 41·9	− 91·6	− 48·0	− 65·1
May	− 11·0	− 19·5	+ 6·8	+ 15·0	− 39·9	− 102·7	− 28·7	− 49·1
June	− 10·5	− 16·5	− 9·0	+ 3·8	− 38·5	− 90·5	− 43·5	− 61·3
July	− 6·6	− 12·4	− 23·3	+ 1·5	− 35·9	− 84·9	− 28·6	− 54·2
August	− 4·5	− 9·4	− 50·4	+ 18·2	− 45·6	− 71·6	− 20·3	− 26·6
September	− 5·9	− 8·9	− 23·0	− 2·3	− 44·7	− 73·8	+ 11·4	− 42·6
October	− 8·0	− 9·7	+ 5·2	− 9·9	− 39·4	− 86·2	− 9·6	....
November	− 7·7	− 8·6	+ 6·4	− 0·1	− 58·1	− 79·8	+ 1·5	....
December	− 0·7	− 3·7	+ 25·9	+ 0·1	− 60·1	− 33·9	− 9·9	....
Total	− 87·0	− 146·0	− 112·7	+ 25·0	− 496·7	− 918·1	− 283·6	− 431·7

Canadian Exporters Encouraged to Discuss Problems With United States Customs

Channels of trade rendered less tortuous by welcome display of goodwill, illustrated by letter to shippers from Appraiser of Merchandise at Detroit.

CANADIAN exporters are being invited to take advantage of every opportunity to sell their products in the United States, and the channels of trade rendered less tortuous by a welcome display of goodwill along the international boundary. Customs officials in the United States are making a generous contribution to the establishment of closer commercial relations between their country and Canada, one example of which is provided by Theodor Hurwitz, Appraiser of Merchandise for the Bureau of Customs, in Detroit. With his permission, the following letter, addressed to shippers in Canada, is herewith reproduced:

"Dear Mr. Shipper: Great strides have recently been taken by our government and governments throughout the world to encourage foreign trade. In the Customs Service, we realize that regardless of agreements or devices set up to accomplish this trade, there must be a thorough understanding between shipper, customs administration, and importer of the regulatory laws. Such laws, we all appreciate, are necessary to any operation as huge as that of administering the operation of the United States Tariff Act.

"It has been my experience that a tremendous amount of good and satisfaction comes from personal contact with shippers and importers. Such contact allows us to explain the requirement of the law in respect to rates of duty, valuation of merchandise, invoicing, marking, prohibitions, currency, and so forth. Such contacts, even more, allow shippers or producers to explain methods of production, value of merchandise, selling policies, and other pertinent facts, so that customs officers can apply the law in a reasonable and businesslike manner without delay.

"It is the policy of the United States Customs Bureau to encourage conferences with shippers and importers. We want to process your transactions through customs as expeditiously as we can with a sound administration of the applicable laws. To facilitate the process, I invite and encourage you to confer with us at any time you may be in Detroit or Port Huron, Michigan. Very truly yours, (signed) Theodor Hurwitz, Appraiser of Merchandise."

Similar Letter Addressed to American Importers

A somewhat similar letter has been addressed to importers in the United States, the first paragraph of which reads as follows: "Tariff laws, dealing with thousands of commodities sold in hundreds of ways, are necessarily complicated and have resulted in many court decisions interpreting these laws. Your customs house is staffed with personnel who are familiar with these laws and decisions. We are in a position to advise you regarding your particular importations in a minimum of time, and we extend an invitation to you and your customs broker to consult with us."

The Commercial Relations and Foreign Tariffs Division, of the Department of Trade and Commerce, Ottawa, is equally prepared to furnish data concerning United States laws and regulations. Canadian exporters are invited to confer personally concerning their problems with officials of the department, and with United States customs officers at the various ports of entry to that country.

Devaluation Aids Dollar Exports From Eastern Caribbean Area

Increased tourist returns anticipated—Sharp rises expected in cost of certain imported commodities—Purchases from hard-currency sources to be reduced to minimum—Efforts being made to broaden the economic base and to raise production levels.

By T. G. Major, Canadian Government Trade Commissioner

PORT-OF-SPAIN, October 18, 1949.—Devaluation of sterling, francs and guilders is expected to stimulate dollar exports from the Eastern Caribbean and the Guianas and to increase tourist returns. However, the price of sugar remains the greatest factor in the welfare of the entire area. On the other hand, sharp increases are anticipated in the cost of textiles, hardware, petroleum products and some foodstuffs. Rising living costs are likely to result in demands for higher wages, particularly in Trinidad. Much difficulty is expected in preventing a severe inflationary movement.

Further restrictions on purchases in hard-currency countries are certain, with actual buying rigidly limited to absolute necessities unobtainable in soft-currency countries. In the British area especially, every effort will be made by governments to save and earn dollars. Austerity measures will be carried as far as the economy of the colonies and the welfare of the people will permit.

The effects of the economic crisis in Great Britain have not yet been felt by the general public. Consumer goods from the hard-currency countries have been replaced largely by those from the sterling area. Prices tend to be higher, but retail sales remain active as a result of the good crops and active tourist trade. Reports indicate that orders placed early in the year for the Christmas trade will permit well-stocked shelves.

Business Conditions Generally Satisfactory

Business conditions in general throughout the area have been reasonably satisfactory during the past four months largely as a result of good crops and an active demand for export commodities. Although Antigua and Barbados suffered from extended dry weather and there was excessive rainfall in the coastal region of British Guiana, crop conditions generally have been good.

There were excellent sugar cane crops in all the main producing islands, although production of sugar in Antigua and British Guiana was reduced by labour troubles. The most serious loss was in Antigua where slow-down tactics by the cane cutters necessitated the closing down of grinding operations late in August. It is estimated that about half the crop, or about 4,000 tons of cane, has been left over for harvesting in 1950. The effects of this on purchasing power in the island was partly compensated for by an excellent cotton crop.

A storm of hurricane proportions struck Barbados at the end of August with the heaviest rainfall in 100 years. Although there was considerable property damage and some loss of life, the crops benefited. There also was much damage in Tobago.

Throughout the Eastern Caribbean the intensification of the sterling crisis is resulting in active efforts to broaden the economic base and to step up local production. In general, these plans are of a long-term nature, such as the expansion of rice production in British Guiana and Trinidad, mechanization and utilization of improved varieties of sugar cane, and timber industry development in the Guianas. Marine exploration for petroleum in the Gulf of Paria and increased boring operations in Barbados are expected to get under way in 1950, although devaluation will result in higher cost of equipment.

Efforts Being Made to Attract Foreign Capital

Efforts are being made to attract outside capital for new secondary industries, notably in Trinidad, where the government has introduced an "Aid to Industries Bill" in the local legislature. The construction of a deep water harbour in Barbados has been recommended at a cost of some BWI$15,000,000, while construction of such a harbour in Martinique is under way. New airports are being built in both Guadeloupe and Martinique, and the acquisition of landing rights by Trans-Canada Airlines is expected to result in the construction of a new airstrip in Barbados. In British Guiana, rebuilding of the business centre of Georgetown proceeds apace.

The closing down of the United States air bases in Antigua, St. Lucia and British Guiana, and the sale of buildings and equipment to the colonial authorities was completed during the period under review. Similar action has been announced in the case of Waller Field, in Trinidad, and there has been a sharp reduction in locally employed civilians on the United States naval operating base at Chaguaramas. Proposals for utilizing the bases in St. Lucia and Antigua for tourist purposes are being considered. The buildings will assist in relieving the housing shortage in all four colonies.

Added Tourist Accommodation Necessary

The provision of tourist accommodation and attractions is one of the major problems in this area, as there is a general feeling that this is potentially the most valuable source of dollar revenue. Recent surveys have indicated that actual hotel and lodging house accommodation is far from adequate to handle any large increase in tourists, particularly of the winter-resident type. The provision of greater attractions for cruise passengers, especially modern bathing facilities, is particularly important in Trinidad, where calls are planned by several large liners in addition to the regular services already provided by United States and Canadian cruise ships.

In general, it may be said that the Eastern Caribbean area is in an interim period in its development. It is being realized more and more fully that the old sugar economy can no longer serve as an adequate base. Old industries must be put on a more efficient basis, known resources must be expanded and new potentialities explored. Efforts are being made to establish new secondary industries, utilizing local resources. All this will require new capital and the creation of conditions attractive to the investment of both local and outside capital. In addition, it is quite evident that much redistribution of population will be necessary if the largely undeveloped resources of the Guianas are to be utilized. Such economic expansion must go hand in hand with the greater measure of political responsibility being given the peoples of the Eastern Caribbean and the Guianas. Fundamental to these developments is a long-term solution of the exchange problem between this soft-currency area and its neighbours in the Americas.

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

Brockville—Chamber of Commerce.
Calgary—Board of Trade.
Charlottetown—Board of Trade.
Edmonton—Canadian Manufacturers' Association.
Fredericton—Chamber of Commerce.
Gananoque—Chamber of Commerce.
Halifax—Board of Trade.
Hamilton—Chamber of Commerce.
Kingston—Chamber of Commerce.
Moncton—Board of Trade.
Montreal—Montreal Board of Trade.
Pembroke—Chamber of Commerce.
Quebec City—Board of Trade.
Regina—Chamber of Commerce.
Saint John—Board of Trade.
Saskatoon—Board of Trade.
Sherbrooke—Chamber of Commerce.
St. John's—Department of Trade and Commerce, Stott Building.
Toronto—Canadian Manufacturers' Association.
Vancouver—Department of Trade and Commerce, 355 Burrard Street.
Victoria—Department of Trade and Industry.
Winnipeg—Canadian Manufacturers' Association.

L. H. Ausman, Canadian Government Trade Commissioner in Leopoldville, has returned home on leave, and is now touring Canada from coast to coast, to meet businessmen interested in trading with the Belgian Congo, Angola and French Equatorial Africa.

Vancouver-Victoria—November 12-18.

C. J. Van Tighem, Commercial Secretary for Canada in Lima, Peru, has returned home on leave and is touring Canada, discussing with businessmen the further development of trade with Peru and Ecuador. On conclusion of his stay in Canada, Mr. Van Tighem will proceed to São Paulo, Brazil, as Canadian Government Trade Commissioner, succeeding Mr. J. C. Depocas in that post.

Toronto—November 9-19.
Batawa-Deseronto—November 21.
Kingston-Brockville—November 22.
Ottawa—November 22-23.
Pembroke-Douglas—November 24.
New York City—November 27.

Paul V. McLane, Commercial Secretary for Canada in New Zealand, will complete his tour of Canada by a visit to Vancouver from November 21 to 30. He will be available to discuss with businessmen conditions in New Zealand, Fiji and Western Samoa.

E. H. Maguire, Commercial Secretary for Canada in Santiago, Chile, has returned home on leave, and is making a tour of Canada, discussing with businessmen trade conditions in Chile and Bolivia.

Kingston-Gananoque—November 14
Montreal—November 15-26
Quebec City—November 28
Saint John—November 30
Halifax—December 2
Ottawa—December 5-12

Trade and Tariff Regulations

Australian Tariff Board Warns Industry

Sydney, N.S.W., October 25, 1949.—(FTS)—Measures designed to restrict imports from the dollar area are discussed in the annual report of the Australian Tariff Board, which indicated that their continuance, while necessary, might result in "the establishment of conditions which may result in difficulties when the time for their removal arrives." For example, axes and similar tools of Australian manufacture are not competitive with those imported from the United Kingdom only because the latter are fitted with Canadian hickory handles, unobtainable in Australia because of import restrictions. In the case of the woven rayon piece-goods inquiry, it was disclosed that Australian manufacturers could not obtain licences to import certain up-to-date plant from the United States, although their competitors in the United Kingdom were said to be able to obtain such plant. This naturally puts the Australian manufacturer at a disadvantage.

The report stresses the fact that the competitive position of Australian industry has deteriorated during the year ended June 30, 1949, and devotes much space to the problems concerning falling markets anticipated during the next year or so. Reference is also made to increases in Australian prices, and specifically to the increased price for Australian coal. These were considered insignificant, however, in their influences, as compared with the effects of insufficient and irregular supplies.

The Board appreciated the fact that import restrictions were contributing to the rapid increase in "consumer costs" for Australians.

The report also indicated that Australian manufacturers hoped to enter export markets in an attempt to offset the limited Australian demand and consequent higher costs. The success of the Australian manufacturer in this respect will largely determine his ability to survive.

Belgium Considers Relaxation of Controls

Brussels, October 24, 1949.—(FTS)—Consideration is being given by the Belgian Ministry of Foreign Affairs and Foreign Trade to the suspension of import controls on goods from the dollar area, according to a notice appearing in the weekly bulletin of the "Kredietbank". In other words, this would indicate that the prior approval of the Foreign Exchange Control Institute will no longer be necessary for the importation of goods in the following category: "declarations in lieu of licence".

Trinidad Suspends Duty on Salted Fish

Port-of-Spain, November 2, 1949.—(FTS)—Duties on all salted fish imported by Trinidad have been suspended, as a direct result of the devaluation of the pound sterling. This decision was taken by the government in an effort to offset any rise in the cost of living through an increase in prices for essential foods. The controller has purchased from Canada 375 butts of cod, of which 125 butts will be provided by Newfoundland, and 125 butts of pollock, half to be shipped in November and half in December.

There is a tendency, as a result of devaluation, to obtain supplies in the sterling area, wherever possible. This trend is likely to continue, as the principal consideration is the procurement of supplies at the lowest cost, thereby saving dollars. The present plan is to switch gradually to non-dollar countries in purchasing essential foodstuffs, as sterling supplies become available.

Virgin Islands Imposes Surcharge on Certain Customs Duties

Port-of-Spain, October 25, 1949.—(FTS)—Effective October 1, 1949, a surcharge of 43 per cent of the customs duty has been imposed by the Virgin Islands (British) on imports, subject to specific rates of duty.

The surcharge on goods subject to ad valorem rates of duty remains as previously, i.e., 2 per cent of the duty.

Jamaica Issues New Regulations Covering Imports of Fruits, Vegetables and Plants

Purchases may be made for local consumption from Canada, Ireland, New Zealand, the United Kingdom and the United States—Potatoes may be brought in from Holland and fresh fruit, other than citrus, may be imported from Tasmania.

By M. B. Palmer, Canadian Government Trade Commissioner

KINGSTON, October 26, 1949.—New regulations governing the importation of fruits, vegetables and plants have been issued by Jamaica, effective October 11, 1949. It is now provided that fruits and vegetables, including the dried varieties, may be imported for local consumption from Canada, Ireland, New Zealand, the United Kingdom and the United States. Potatoes, but no other kinds of fruit or vegetable, may be brought in from Holland, and fresh fruit, other than citrus, may be imported from Tasmania. All imports must be accompanied by proper certificates to the effect that they are home-grown, fresh, clean and free of pests and diseases.

In the case of Irish potatoes for local consumption, imported from the United Kingdom, Ireland, the United States and Holland, the certificate must also state that the potatoes are not infected by wart disease (*Synchitrium endobioticum*) and that this disease does not occur within five miles of their place of origin. In the case of such imports from Canada, the United States and Holland, the certificate must also state that the potatoes are not infected by ring rot (*Corynebacterium sepedonicum*). Potatoes imported from Canada are no longer required to be certified free of wart disease. Imports of seed potatoes may be made only by the Jamaica Government's Department of Commerce and Industries and the local Irish Potato Growers Co-operative, Limited. Such imports must be accompanied by certificates as in respect of table potatoes.

The new regulations allow the import of plants and plant parts and of some other vegetable products, subject to stated conditions.

DATA FOR EXPORTERS COMPILED

Information, of particular interest to Canadian exporters, concerning shipping documents and customs regulations of foreign countries, is being compiled by the Commercial Relations and Foreign Tariffs Division, Foreign Trade Service. Countries concerning which such information is now available in a revised form are: Cuba, Denmark, Dominican Republic, Egypt, Guatemala, Italy, Mexico, Netherlands Antilles, Nicaragua, Norway, Panama, Surinam (Netherlands Guiana), Sweden, Switzerland and Venezuela. Data on other countries will be made available from time to time.

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 Quebec. † Calls at Halifax several days later.
(r) Indicates refrigerated cargo space.

Destination	Loading Date	Vessel	Operator or Agent
Africa—South and East—			
Cape Town / Port Elizabeth / East London / Durban	November 25	*Atlantic Empress*	Shipping Limited
	November 26	*Thorshall*	Kerr Steamships
Lourenço Marques / Beira / Mombasa	November 26	*Thorshall*	Kerr Steamships
Lourenço Marques	November 25	*Atlantic Empress*	Shipping Limited
Argentina—			
Buenos Aires	November 20–24	*Bowgran*	Cunard Donaldson
Australia—			
Brisbane / Sydney / Geelong / Melbourne / Adelaide	November 18–23	*City of Delhi*	Montreal Australia New Zealand Line
Belgium—			
Antwerp	November 19–25	*Rouen*	Furness Withy
	November 22–29	*Tidaholm*	Swedish American
	November 24	*Carmelfjell*	Brock Shipping
	November 25	*Prins Willem Van Oranje*	Shipping Limited
	November 25	*Prins Alexander*	Shipping Limited
	November 30	*Ornefjell*	Brock Shipping
Brazil—			
Rio de Janeiro / Santos	November 20–24	*Bowgran*	Cunard Donaldson
	November 22–26	*Scottish Prince*	Furness Withy
Cuba—			
Havana	November 18–24	†*Vretaholm*	Swedish American
Denmark—			
Copenhagen	November 22–29	*Tidaholm*	Swedish American
Finland—			
Helsinki	November 22–29	*Tidaholm*	Swedish American
France—			
Le Havre	November 19–25	*Rouen*	Furness Withy
	November 22–29	*Tidaholm*	Swedish American
	November 25	*Prins Willem van Oranje*	Shipping Limited
	November 25	*Prins Alexander*	Shipping Limited

Destination	Loading Date	Vessel	Operator or Agent
Germany— Hamburg	November 22–29	*Tidaholm*	Swedish American
	November 25	*Prins Willem Van Oranje*	Shipping Limited
	November 25	*Prins Alexander*	Shipping Limited
Hong Kong	November 18–28	*Islandside*	March Shipping
Ireland— Dublin	November 19–23	*Fanad Head*	McLean Kennedy
Dublin, Cork	November 24	*Irish Cedar*	Shipping Limited
Mexico— Veracruz, Tampico	November 18–24	†*Vretaholm*	Swedish American
Netherlands— Amsterdam, Rotterdam	November 22–29	*Tidaholm*	Swedish American
	November 24	*Carmelfjell*	Brock Shipping
	November 25	*Prins Willem Van Oranje*	Shipping Limited
	November 25	*Prins Alexander*	Shipping Limited
	November 30	*Ornefjell*	Brock Shipping
Northern Ireland— Belfast	November 21–25	*Ramore Head*	McLean Kennedy
Norway— Oslo, Stavanger, Kristiansand, Bergen	November 22–29	*Tidaholm*	Swedish American
Pakistan— Karachi	November 18–28	*Islandside*	March Shipping
Sweden— Gothenburg, Malmo, Norrkoping, Stockholm	November 22–29	*Tidaholm*	Swedish American
United Kingdom— Leith, Newcastle	November 18–23	*Cairnvalona*	Furness Withy
Liverpool	November 15–25	*Seaboard Queen*	March Shipping
	November 17–24	**Vardulia*	Cunard Donaldson
	November 19–23	*Fanad Head*	McLean Kennedy
	November 21–25	*Ramore Head*	McLean Kennedy
	November 25	*Empress of France* (r)	Canadian Pacific
London	November 24	*Carmelfjell*	Brock Shipping
	November 27	*Beaverglen* (r)	Canadian Pacific
	November 30	*Ornefjell*	Brock Shipping
	November 30	†*Triberg*	March Shipping
Uruguay— Montevideo	November 20–24	*Bowgran*	Cunard Donaldson
	November 22–26	*Scottish Prince*	Furness Withy
West Indies— Jamaica, Bahamas	November 24	**Canadian Conqueror*	Canadian National
Antigua, Barbados, Bermuda, British Guiana, Dominica, Grenada, Montserrat, St. Kitts, St. Lucia, St. Vincent, Trinidad	November 18–25	*Lady Nelson* (r)	Canadian National

DEPARTURES FROM HALIFAX

* Calls at Saint John.

(r) Indicates refrigerated cargo space.

Destination	Loading Date	Vessel	Operator or Agent
Aden— Port Aden	December 9–13	*Sommelsdijk*	Cunard Donaldson
Argentina— Buenos Aires	December 5–6	*Mormacsea*	Montreal Shipping
Brazil— Santos, Rio de Janeiro	December 5–6	*Mormacsea*	Montreal Shipping
British Honduras— Belize	December 6	**Sundial*	Saguenay Terminals
Canal Zone— Cristobal	December 6	**Sundial*	Saguenay Terminals
Colombia— Barranquilla	December 6	**Sundial*	Saguenay Terminals
	December 10–16	**Svaneholm*	Swedish American
Cuba— Havana	December 6	**Sundial*	Saguenay Terminals
Denmark— Copenhagen	December 19–20	*Mormacisle*	Montreal Shipping
Dominican Republic— Ciudad Trujillo	December 12–13	*Sunprince*	Saguenay Terminals
Egypt— Alexandria, Port Said, Suez	December 9–13	*Sommelsdijk*	Cunard Donaldson
Finland— Helsinki	December 19–20	*Mormacisle*	Montreal Shipping
Guatemala— Puerto Barrios	December 6	**Sundial*	Saguenay Terminals
Haiti— Port au Prince	December 12–13	*Sunprince*	Saguenay Terminals
Hong Kong	November 18–23	*Ajax*	Cunard Donaldson
	November 24–28	*Grete Maersk*	Robert Reford
	December 10–14	*Anna Maersk*	Robert Reford
	December 27–31	*Olga Maersk*	Robert Reford
Indonesia— Batavia, Samarang, Soerabaya, Cheribon	December 9–13	**Sommelsdijk*	Cunard Donaldson
Japan— Kobe, Yokohama	November 18–23	*Ajax*	Cunard Donaldson
Malaya— Penang, Port Swettenham	November 24–28	*Grete Maersk*	Robert Reford
	December 9–13	*Sommelsdijk*	Cunard Donaldson
	December 10–14	*Anna Maersk*	Robert Reford
	December 27–31	*Olga Maersk*	Robert Reford
Netherlands Antilles— Curaçao	December 10–16	**Svaneholm*	Swedish American
Norway— Oslo	December 19–29	*Mormacisle*	Montreal Shipping

DEPARTURES FROM HALIFAX—Concluded

Destination	Loading Date	Vessel	Operator or Agent
Philippines—			
Manila	November 18–23	*Ajax*	Cunard Donaldson
Iloilo	November 24–28	*Grete Maersk*	Robert Reford
Cebu	December 10–14	*Anna Maersk*	Robert Reford
	December 27–31	*Olga Maersk*	Robert Reford
Poland—			
Gdynia	December 19–20	*Mormacisle*	Montreal Shipping
Puerto Rico—			
San Juan	December 10–16	**Svaneholm*	Swedish American
	December 12–13	**Sunprince*	Saguenay Terminals
Singapore	November 24–28	*Grete Maersk*	Robert Reford
	December 9–13	*Sommelsdijk*	Cunard Donaldson
	December 10–14	*Anna Maersk*	Robert Reford
	December 27–31	*Olga Maersk*	Robert Reford
Sweden—			
Malmo			
Stockholm	December 19–20	*Mormacisle*	Montreal Shipping
Gothenburg			
United Kingdom—			
Avonmouth	November 24–28	*Montreal City*	Furness Withy
Swansea	December 3–8	*Eucadia*	Furness Withy
Liverpool	Nov. 27–Dec. 1	*Samaria* (r)	Cunard Donaldson
	Nov. 29–Dec. 2	*Newfoundland* (r)	Furness Withy
	December 8–12	*Franconia* (r)	Cunard Donaldson
	December 17–21	*Nova Scotia* (r)	Furness Withy
London	December 1–3	*Valacia* (r)	Cunard Donaldson
Southampton	November 24	*Aquitania*	Cunard Donaldson
Uruguay—			
Montevideo	December 5–6	*Mormacsea*	Montreal Shipping
Venezuela—			
La Guaira			
Maracaibo	December 10–16	†*Svaneholm*	Swedish American
Puerto Cabello	December 12–13	**Sunprince*	Saguenay Terminals
West Indies—			
Antigua			
Barbados			
Bermuda			
British Guiana	Nov. 29–Dec. 8	*A Ship*	Alcoa Steamships
Dominica	December 2–9	**Canadian Challenger*	Canadian National
Grenada	December 13–22	*A Ship*	Alcoa Steamships
Montserrat	December 16–23	**Lady Rodney* (r)	Canadian National
St. Kitts	January 4–11	**Lady Nelson* (r)	Canadian National
St. Lucia			
St. Vincent			
Trinidad			
Jamaica	December 6	*Canadian Cruiser*	Canadian National
Bahamas	December 22	*Canadian Constructor*	Canadian National
	January 3	*Canadian Cruiser*	Canadian National

DEPARTURES FROM SAINT JOHN

* Calls at Halifax.
(r) Indicates refrigerated cargo space.

Destination	Loading Date	Vessel	Operator or Agent
Africa—South and East—			
Cape Town			
Port Elizabeth	December 3–13	*Cabano*	Elder Dempster
East London	December 20	*Sagaland*	Shipping Limited
Lourenço Marques	December 27	*Thorsisle*	Kerr Steamships
Beira	January 4–14	*Chandler*	Elder Dempster
Mombasa	December 27	*Thorsisle*	Kerr Steamships

DEPARTURES FROM SAINT JOHN—Concluded

Destination	Loading Date	Vessel	Operator or Agent
Australia—			
Brisbane, Sydney, Geelong, Melbourne, Adelaide	January	*Ottawa Valley*	Montreal Australia New Zealand Line
Belgium— Antwerp	December 20	*Hada County*	Canada Steamships
	December 22	**Beaverlake* (r)	Canadian Pacific
	December 22–29	*Wanstead*	Cunard Donaldson
	December 29	**Beavercove* (r)	Canadian Pacific
	January 4	**Beaverglen* (r)	Canadian Pacific
France— Le Havre	December 20	*Hada County*	Canada Steamships
Germany— Hamburg	December 22–29	*Wanstead*	Cunard Donaldson
Netherlands— Rotterdam, Amsterdam	December 20	*Hada County*	Canada Steamships
	December 22–29	*Wanstead*	Cunard Donaldson
New Zealand—			
Auckland, Wellington, Lyttelton, Dunedin	January	*Pipiriki*	Montreal Australia New Zealand Line
United Kingdom— Avonmouth	December 14–19	*Dorelian*	Cunard Donaldson
	Dec. 26–Jan. 2	*Norwegian*	Cunard Donaldson
Glasgow	December 8–14	*Delilian* (r)	Cunard Donaldson
	December 16–21	*Salacia* (r)	Cunard Donaldson
	December 26–30	*Moveria* (r)	Cunard Donaldson
Liverpool	December 8–14	*Fort Miami*	Cunard Donaldson
	December 16	**Beaverburn* (r)	Canadian Pacific
	December 17–23	*Arabia* (r)	Cunard Donaldson
	December 23–30	*Fort Cadotte*	Cunard Donaldson
	December 30	**Empress of Canada* (r)	Canadian Pacific
	January 6	**Beaverford*	Canadian Pacific
London	December 5–10	*Fort Musquarro*	Cunard Donaldson
	December 15–21	*Hillcrest Park*	Cunard Donaldson
	December 21–27	*Asia* (r)	Cunard Donaldson
	December 22	**Beaverlake* (r)	Canadian Pacific
	Dec. 26–Jan. 2	*Fort Spokane*	Cunard Donaldson
	December 29	**Beavercove* (r)	Canadian Pacific
	January 4	**Beaverglen* (r)	Canadian Pacific
Manchester	Nov. 30–Dec. 3	*Manchester Trader* (r)	Furness Withy
	December 7–10	*Manchester Commerce* (r)	Furness Withy

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—South and East—			
Cape Town, Port Elizabeth, East London, Durban, Lourenço Marques	December 10	*Silveroak*	Dingwall Cotts
	January 10	*Limburg*	Dingwall Cotts

Destination	Loading Date	Vessel	Operator or Agent
Argentina— Buenos Aires	December 5 December 8	*Ravnanger* *Mormacsun*	Empire Shipping Balfour Guthrie
Australia— Sydney Melbourne	December 15	*Alameda*	Dingwall Cotts
Sydney Melbourne Adelaide	Mid-December January	*Kanangoora* *A Ship*	Empire Shipping Empire Shipping
Sydney	December 16	*Aorangi*	Canadian Australasian
Hobart Melbourne Sydney	December 20	*Waikawa*	Canadian Australasian
Belgium— Antwerp	November 23 Late November December 9 December 26 December 28	*Bio Bio* (r) *Delftdyk* *Colombia* (r) *Guayana* (r) *Washington*	Gardner Johnson Royal Mail Lines Gardner Johnson Gardner Johnson Empire Shipping
Brazil— Rio de Janeiro Santos	December 5 December 8	*Ravnanger* *Mormacsun*	Empire Shipping Balfour Guthrie
Canal Zone— Balboa Panama City	November 27 November 27 December 10 December 12 December 16 December 27	*Anchor Hitch* *Santa Leonor* *Santa Adela* *Bullaren* *Coastal Adventurer* *Gunner's Knot*	Gardner Johnson Gardner Johnson Gardner Johnson Empire Shipping Gardner Johnson Gardner Johnson
Cristobal	November 27 December 16 December 27	*Anchor Hitch* *Coastal Adventurer* *Gunner's Knot*	Gardner Johnson Gardner Johnson Gardner Johnson
Balboa Cristobal	December 8	*Mormacsun*	Balfour Guthrie
Ceylon— Colombo	November 24 December 4	*Höegh Silverbeam* *Utrecht*	Dingwall Cotts Dingwall Cotts
Chile— Antofagasta Valparaiso	December 5	*Ravnanger*	Empire Shipping
Africa Antofagasta Valparaiso	November 27 December 10	*Santa Leonor* *Santa Adela*	Gardner Johnson Gardner Johnson
China— Shanghai	November 23–24 December 2–3	*China Mail* (r) *Island Mail* (r)	Canadian Blue Star Canadian Blue Star
Colombia— Barranquilla	November 27 November 27 December 10 December 12 December 16 December 27	*Anchor Hitch* *Santa Leonor* *Santa Adela* *Bullaren* *Coastal Adventurer* *Gunner's Knot*	Gardner Johnson Gardner Johnson Gardner Johnson Empire Shipping Gardner Johnson Gardner Johnson
Cartagena	December 8	*Mormacsun*	Balfour Guthrie
Buenaventura	November 27 December 10	*Santa Leonor* *Santa Adela*	Gardner Johnson Gardner Johnson
Costa Rica— Puntarenas	November 27 December 12 December 16 December 27	*Anchor Hitch* *Glimmaren* *Coastal Adventurer* *Gunner's Knot*	Gardner Johnson Empire Shipping Gardner Johnson Gardner Johnson

Destination	Loading Date	Vessel	Operator or Agent
Ecuador—			
Guayaquil	November 27	*Santa Leonor*	Gardner Johnson
	December 10	*Santa Adela*	Gardner Johnson
El Salvador—	November 27	*Anchor Hitch*	Gardner Johnson
La Libertad	November 27	*Santa Leonor*	Gardner Johnson
La Union	December 10	*Santa Adela*	Gardner Johnson
	December 12	*Bullaren*	Empire Shipping
	December 16	*Coastal Adventurer*	Gardner Johnson
	December 27	*Gunner's Knot*	Gardner Johnson
Fiji Islands—			
Suva	November 30	*Thor I*	Empire Shipping
	December 16	*Aorangi*	Canadian Australasian
France—			
Le Havre	December 28	*Washington*	Empire Shipping
Bordeaux			
Dunkirk			
Germany—	November 23	*Bio Bio* (r)	Gardner Johnson
Hamburg	Late November	*Delftdyk*	Royal Mail Lines
	December 9	*Colombia* (r)	Gardner Johnson
	December 26	*Guayana*	Gardner Johnson
Guatemala—	November 27	*Anchor Hitch*	Gardner Johnson
San Jose	November 27	*Santa Leonor*	Gardner Johnson
Guatemala City	December 10	*Santa Adela*	Gardner Johnson
	December 12	*Bullaren*	Empire Shipping
	December 16	*Coastal Adventurer*	Gardner Johnson
	Decembre 27	*Gunner's Knot*	Gardner Johnson
Hawaii—			
Honolulu	November 30	*Hawaiian Craftsman*	Dingwall Cotts
	December 10	*Hawaiian Lumberman*	Dingwall Cotts
	December 16	*Aorangi*	Canadian Australasian
Hong Kong	November 23–24	*Ocean Mail* (r)	Canadian Blue Star
	Late November	*Nikobar*	Johnson Walton
	Late November	*Oregon*	Dodwell and Company
	December 2	*Vingnes*	Empire Shipping
	December 2–3	*Island Mail* (r)	Canadian Blue Star
	December 12	*Francisville*	Balfour Guthrie
India—			
Bombay	November 24	*Höegh Silverbeam*	Dingwall Cotts
Madras	December 14	*Höegh Trader*	Dingwall Cotts
Calcutta			
Bombay	Late November	*Eagle*	Canadian Transport
Calcutta	December 4	*Utrecht*	Dingwall Cotts
Madras	December 9–10	*India Mail*	Canadian Blue Star
Indonesia—			
Batavia	November 24	*Höegh Silverbeam*	Dingwall Cotts
Samarang	December 4	*Utrechrt*	Dingwall Cotts
Soerabaya	December 14	*Höegh Trader*	Dingwall Cotts
Cheribon			
Batavia	December 12	*Francisville*	Balfour Guthrie
Israel—			
Tel-Aviv	Mid-December	*A Ship*	Empire Shipping
Haifa			
Italy—			
Genoa	December 5	*Etna*	Empire Shipping
Naples			
Venice			
Trieste			

Destination	Loading Date	Vessel	Operator or Agent
Japan— Yokohama	November 23–24	*Ocean Mail* (r)	Canadian Blue Star
	Late November	*Oregon*	Dodwell and Company
	December 2–3	*Island Mail* (r)	Canadian Blue Star
	December 9–10	*India Mail*	Canadian Blue Star
Malaya— Penang, Port Swettenham	December 4	*Utrecht*	Dingwall Cotts
	December 9–10	*India Mail*	Canadian Blue Star
	December 12	*Francisville*	Balfour Guthrie
Mexico— Manzanillo, Acapulco	November 27	*Anchor Hitch*	Gardner Johnson
	December 16	*Coastal Adventurer*	Gardner Johnson
	December 27	*Gunner's Knot*	Gardner Johnson
Netherlands— Rotterdam	Late November	*Delftdyk*	Royal Mail Lines
Rotterdam, Amsterdam	December 28	*Washington*	Empire Shipping
Netherlands Antilles— Curaçao	December 8	*Mormacsun*	Balfour Guthrie
New Caledonia— Noumea	November 30	*Thor I*	Empire Shipping
New Hebrides— Port Vila	November 30	*Thor I*	Empire Shipping
New Zealand— Auckland, Wellington	December 20	*Waikawa*	Canadian Australasian
Auckland	December 15	*Alameda*	Dingwall Cotts
	December 16	*Aorangi*	Canadian Australasian
Pakistan— Karachi	November 24	*Höegh Silverbeam*	Dingwall Cotts
Persian Gulf	November 24	*Höegh Silverbeam*	Dingwall Cotts
Peru— Callao, Mollendo	November 27	*Santa Leonor*	Gardner Johnson
	December 10	*Santa Adela*	Gardner Johnson
Philippines— Manila, Iloilo, Cebu	November 23–24	*Ocean Mail* (r)	Canadian Blue Star
	November 24	*Höegh Silverbeam*	Dingwall Cotts
	Late November	*Oregon*	Dodwell and Company
	December 2–3	*Island Mail* (r)	Canadian Blue Star
	December 4	*Utrecht*	Dingwall Cotts
	December 9–10	*India Mail*	Canadian Blue Star
	December 12	*Francisville*	Canadian Blue Star
	December 14	*Höegh Trader*	Dingwall Cotts
Manila, Cebu	Late November	*Nikobar*	Johnson Walton
	December 2	*Vingnes*	Empire Shipping
Samoa— Apia	November 30	*Thor I*	Empire Shipping
Pago-Pago	November 15	*Alameda*	Dingwall Cotts
Singapore	November 24	*Höegh Silverbeam*	Dingwall Cotts
	December 4	*Utrecht*	Dingwall Cotts
	December 9–10	*India Mail*	Canadian Blue Star
	December 12	*Francisville*	Balfour Guthrie
	December 14	*Höegh Trader*	Dingwall Cotts
Society Islands— Papeete	November 30	*Thor I*	Empire Shipping
	December 20	*Waikawa*	Canadian Australasian
Spain— Barcelona	December 5	*Etna*	Empire Shipping

Destination	Loading Date	Vessel	Operator or Agent
Sweden—			
Stockholm	November 23	*Bio Bio* (r)	Gardner Johnson
Gothenburg	December 9	*Colombia* (r)	Gardner Johnson
Malmo	December 26	*Guayana*	Gardner Johnson
Tonga—			
Nukualofa	November 30	*Thor I*	Empire Shipping
Trinidad—			
Port-of-Spain	December 8	*Mormacsun*	Balfour Guthrie
United Kingdom—			
Manchester	Late November	*Pacific Shipper* (r)	Furness Withy
	Mid-December	*Pacific Fortune* (r)	Furness Withy
London, Manchester	November 25	*Cape Hawk*	Balfour Guthrie
London	Late November	*Thirlby*	Canadian Blue Star
Liverpool	Late November	*Delftdyk*	Royal Mail Lines
Unstated Ports	November 11–26	*Lake Shawnigan*	Empire Shipping
	Late November	*Leeds City*	Dodwell and Company
	Late November	*Eastern City*	Dodwell and Company
	Late November	*Punta Masco*	Seaboard Shipping
	November 23	*Bio Bio* (r)	Gardner Johnson
	December 9	*Lakonia*	Balfour Guthrie
	December 9	*Colombia* (r)	Gardner Johnson
	December 22	*Cape Howe*	Balfour Guthrie
	December 26	*Guayana* (r)	Gardner Johnson
	January 7	*Lismoria*	Balfour Guthrie
Uruguay—			
Montevideo	December 5	*Ravnanger*	Empire Shipping
	December 8	*Mormacsun*	Balfour Guthrie
Venezuela—			
Maracaibo	November 27	*Anchor Hitch*	Gardner Johnson
	December 16	*Coastal Adventurer*	Gardner Johnson
	December 27	*Gunners' Knot*	Gardner Johnson
Puerto Cabello	December 8	*Mormacsun*	Balfour Guthrie
Maracaibo, Puerto Cabello, La Guaira	December 12	*Bullaren*	Empire Shipping

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 St. John's, via Moncton, N.B., and Sydney, N.S. Boston is likewise connected with St. John's, 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:

Charlottetown to Corner Brook, etc.	Fortnightly	PEI Industrial Corporation
Halifax to St. John's	Weekly	Furness Red Cross Line
Halifax to St. John's	Every three weeks	Furness Warren Line
Halifax to St. John's	Every ten days	Newfoundland-Canada Steamships
Halifax to St. John's	Fortnightly	Rowlings
Halifax to St. John's	Weekly	Shaw Steamships
Montreal to St. John's	Weekly	Blue Peter Steamships
Montreal to St. John's	Fortnightly	Clarke Steamships
Montreal to Corner Brook	Fortnightly	Clarke Steamships
Montreal to St. John's	Fortnightly	Newfoundland-Canada Steamships
Montreal to Goose Bay, Labrador	Fortnightly	Blue Peter Steamships
North Sydney to Port aux Basques	Daily, except Sunday	Canadian National Railways
Saint John to St. John's	Weekly	Furness Red Cross Line
Saint John and Halifax to St. John's	Every three weeks	Blue Peter Steamships
Hamilton to St. John's	Fortnightly	Newfoundland-Great Lakes SS.
Toronto to St. John's	Fortnightly	Newfoundland-Great Lakes SS.

Foreign Trade Service Abroad

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

Argentina

Buenos Aires—H. L. BROWN, Commercial Secretary, Canadian Embassy, Bartolomé Mitre 478.
Territory includes Uruguay and Paraguay.

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

Australia

Sydney—C. M. CROFT, Commercial Counsellor for Canada, City Mutual Life Building, Hunter and Bligh Streets. Address for letters: Post Office Box 3952V.
Territory includes the Australian Capital Territory, New South Wales, Queensland, Northern Territory and Dependencies.

Melbourne—F. W. FRASER, Commercial Secretary for Canada, 83 William Street.
Territory includes States of Victoria, South Australia, Western Australia, and Tasmania.

Belgian Congo

Leopoldville—L. H. AUSMAN, Canadian Government Trade Commissioner, Forescom Building. Address for letters: Boîte Postale 373.
Territory includes Angola and French Equatorial Africa.

Belgium

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

Brazil

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

São Paulo—Acting Commercial Secretary for Canada, Canadian Consulate, Edificio Alois, Rua 7 de Abril, 252. Address for letters: Caixa Postal 6034.

Chile

Santiago—E. H. MAGUIRE, Commercial Secretary, Canadian Embassy, Bank of London and South America Building. Address for letters: Casilla 771.
Territory includes Bolivia.

China

Shanghai—B. I. RANKIN, Acting Commercial Secretary 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, Lebanon, Saudi Arabia, Syria and the Hashemite Kingdom of the Jordan.

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.

Germany

Frankfurt am Main—B. J. BACHAND, Canadian Commercial Representative, Canadian Consulate, 145 Fuerstenbergerstrasse.
Cable address, Canadian Frankfurt-Main.

Greece

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

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.

Foreign Trade Service Abroad—*Continued*

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—R. K. THOMSON, Acting 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, Sophialaan 1-A.

The Hague—D. A. B. MARSHALL, Commercial Secretary (Agricultural Specialist), Canadian Embassy, Sophialaan 1-A.

Territory includes Belgium, Denmark and Luxembourg.

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.

Norway

Oslo—S. G. MACDONALD, Commercial Secretary, Canadian Legation, Fridtjof Nansens Plass 5.

Territory includes Denmark and Greenland.

Pakistan

Karachi—G. A. BROWNE, Canadian Government Trade Commissioner, The Cotton Exchange, McLeod Road. Address for letters: Post Office Box 531.

Territory includes Iran and Afghanistan.

Peru

Lima—R. E. GRAVEL, Acting 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 Thailand.

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—C. B. BIRKETT, 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—D. B. MUNDY, Acting Commercial Secretary, 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 the 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 Boylston Street, Boston 16.

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

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

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

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

Venezuela

Caracas—C. S. BISSETT, Canadian Government Trade Commissioner, Canadian Consulate General, 8° Piso, Edificio America, Esquira 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 Sept. 17	Nominal Quotations Nov. 1	Nominal Quotations Nov. 8
Argentina	Peso	Off.	·2977	·3275	·3275
		Free	·2085	·1222	·1222
Australia	Pound	....	3·2240	2·4640	2·4640
Belgium and Belgium Congo	Franc	....	·0228	·0220	·0220
Bolivia	Boliviano	....	·0238	·0262	·0262
British West Indies (except Jamaica)	Dollar	....	·8396	·6417	·6417
Brazil	Cruzeiro	....	·0544	·0598	·0598
Burma	Rupee	....	·3022	......	......
Ceylon	Rupee	....	·3022	·2310	·2310
Chile	Peso	Off.	·0517	·0569	·0569
		Export	·0323	·0355	·0355
Colombia	Peso	....	·5128	·5641	·5641
Costa Rica	Colon	....	·1800	·1980	·1980
Cuba	Peso	....	1·0000	1·1000	1·1000
Czechoslovakia	Koruna	....	·0200	·0220	·0220
Denmark	Krone	....	·2084	·1592	·1592
Dominican Republic	Peso	....	1·0000	1·1000	1·1000
Ecuador	Sucre	....	·0740	·0815	·0815
Egypt	Pound	....	4·1330	3·1587	3·1587
El Salvador	Colon	....	·4000	·4400	·4400
Fiji	Pound	....	3·6306	2·7748	2·7748
Finland	Markka	....	·0062	·0048	·0048
France, Monaco and French North Africa	Franc	Off.	·0037	......	......
		Free	·0030	·0032	·0032
French Empire—African	Franc	....	·0073	......	......
French Pacific Possessions	Franc	....	·0201	......	......
Germany	Deutsche Mark	....	·3000	·2619	·2619
Guatemala	Quetzal	....	1·0000	1·1000	1·1000
Haiti	Gourde	....	·2000	·2200	·2200
Honduras	Lempira	....	·5000	·5500	·5500
Hong Kong	Dollar	....	·2519	·1925	·1925
Iceland	Krona	....	·1541	·1178	·1178
India	Rupee	....	·3022	·2310	·2310
Iran	Rial	...	·0312	....	....
Iraq	Dinar	...	4·0300	3·0800	3·0800
Ireland	Pound	..	4·0300	3·0800	3·0800
Israel	Pound	...	3·0000	....	....
Italy	Lira	...	·0017	·0018	·0018
Jamaica	Pound	....	4·0300	3·0800	3·0800
Japan	Yen	....	·0028	....	....
Lebanon	Piastre	....	·4561	....	....
Mexico	Peso	....	·1157	·1273	·1273
Netherlands	Florin	....	·3769	·2895	·2895
Netherlands Antilles	Florin	....	·5308	·5833	·5833
New Zealand	Pound	....	4·0150	3·0800	3·0800
Nicaragua	Cordoba	....	·2000	·2200	·2200
Norway	Krone	....	·2015	·1540	·1540
Pakistan	Rupee	....	·3022	·3325	·3325
Panama	Balboa	....	1·0000	1·1000	1·1000
Paraguay	Guarani	....	·3200	....	....
Peru	Sol	....	·1538	·1696	·1696
Philippines	Peso	....	·4975	·5500	·5500
Portugal and Colonies	Escudo	....	·0400	·0385	·0385
Singapore	Straits Dollar	....	·4702	·3593	·3593
Spain and Colonies	Peseta	....	·0916	·1008	·1008
Sweden	Krona	....	·2783	·2126	·2126
Switzerland	Franc	....	·2336	·2536	·2542
Thailand	Baht	....	·1000	....	....
Turkey	Lira	....	·3571	....	....
Union of South Africa	Pound	....	4·0300	3·0800	3·0800
United Kingdom	Pound	....	4·0300	3·0800	3·0800
United States	Dollar	....	1·0000	1·1000	1·1000
Uruguay	Peso	Controlled	·6583	·7241	·7241
		Uncontrolled	·5618	·6180	·6180
Venezuela	Bolivar	....	·2985	·3289	·3289
Yugoslavia	Dinar	....	·0200	....	....