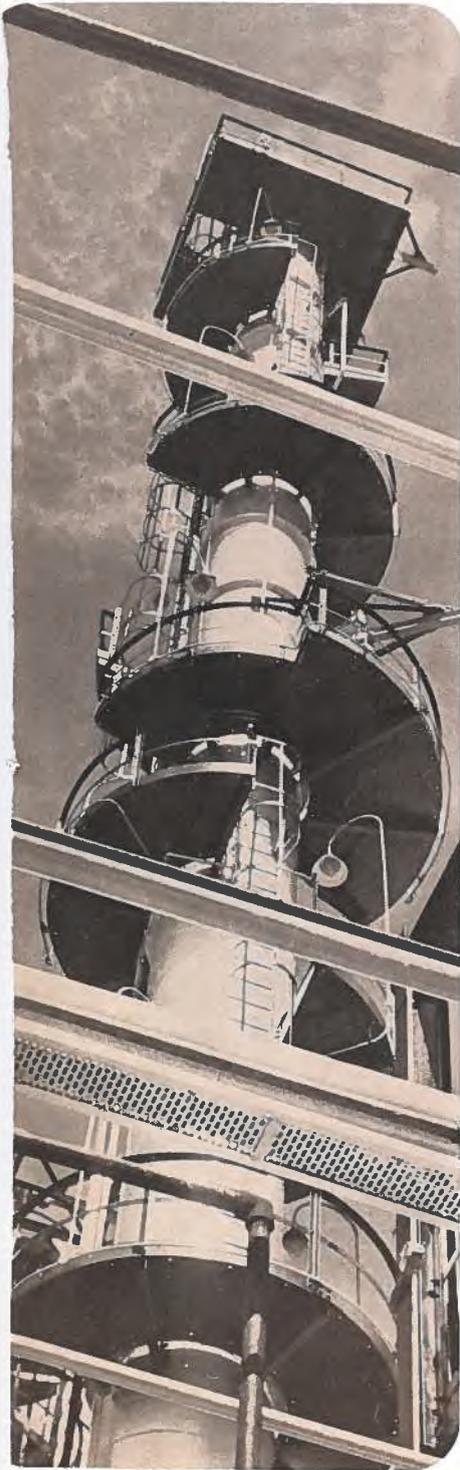


Canada Commerce

Formerly foreign
trade

January

1972



**Caribbean +
Salesmanship =
Export Rise**

Only in Canada, You Say?

C. I. ROOKE, Commercial Officer (Timber) London

The traditional home of the famous Indian totem poles is Western Canada, but the one in the photograph stands in a garden in Surrey, England. Designed, carved and hand-painted by F. R. Gooch, managing director of Guildway Ltd., of Guildford, England, it is just under 15 feet high with four figures representing a hawk, a frog, a bear and little bear, the whole surmounted by a great traditional Thunderbird with a wing span of eight feet.

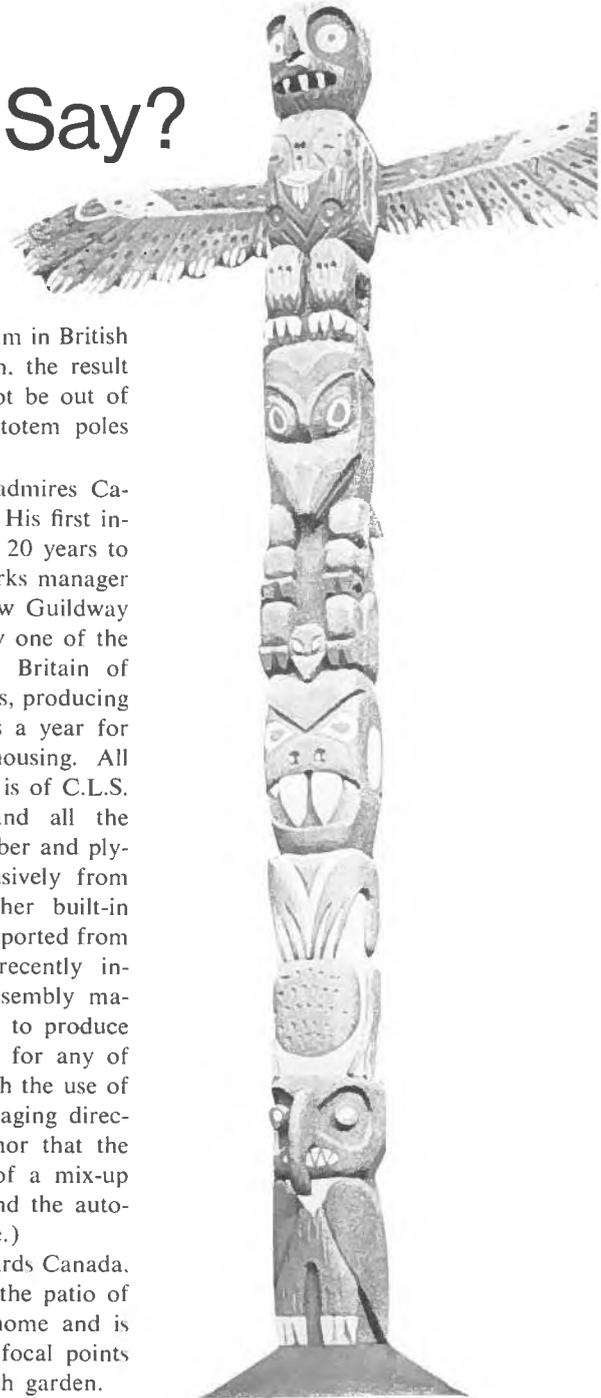
A round Canadian western red cedar log proving too difficult to obtain, it was necessary to glue together three sections of 4 x 12 western red cedar to make a 12 x 12 square which formed the beginning of this British totem pole. Mr. Gooch cannot recall exactly why or when the idea of carving a totem pole first came to him; possibly it was his life-long involvement with timber and his lately developed interest in Indian art and culture. He is a trained carpenter and his work so far has been mainly functional, but wood sculpture has always intrigued him and the raising of this totem pole in his garden last summer represents an ambition finally realized.

Authenticity was his main concern and all the carving was done with an adze similar to those used by Indians. When the carving was finished, the pole was decorated with

paint specially made for him in British Columbia. As can be seen, the result of all his efforts would not be out of place among the Indian totem poles of Western Canada.

Mr. Gooch greatly admires Canadian western red cedar. His first introduction to it goes back 20 years to the days when he was works manager of Cedar Homes Ltd., now Guildway Ltd. This company is now one of the leading manufacturers in Britain of prefabricated timber homes, producing approximately 1,000 units a year for municipal and private housing. All wall studding in the units is of C.L.S. "Timberized" hemlock and all the firm's requirements of timber and plywood come almost exclusively from Canada. Some of its other built-in home comforts are also imported from Canada. The company recently installed a computerized assembly machine which enables them to produce automatically components for any of their house designs through the use of punched tapes. (The managing director strongly denies a rumor that the totem pole is the result of a mix-up between punched tapes and the automatic production machine.)

Facing due west towards Canada, this totem pole stands in the patio of Mr. Gooch's cedar-clad home and is one of the most unusual focal points to be found in any English garden.



In This Issue

Ski buffs and other outdoor types are known to enthuse over the Canadian winter; how much of it is sheer bravado borne of the desperation of weeks of below-zero weather or genuine enjoyment is anyone's guess. In any case we have never heard of anyone refusing a trip to the Caribbean, which is the area *Canada Commerce* features this month.

One of the newer and more important developments there concerns the Caribbean Development Bank, which has been operating now for just under two years. Its first loan, in fact, was made early last year. Canada is one of the major contributors to this bank, and Canadian manufacturers and consultants, therefore, should find the door to the Caribbean market an easier one to push open. The article describing the Bank starts on page 5.

Related articles on page 7 and page 31 tell of the possibilities of entering into joint ventures in Jamaica and of investment opportunities in the Eastern Caribbean. As in most countries, developed or developing, nationalism plays an important role in the ownership of industries and resources and the Caribbean countries are no exception. But generous incentives are offered to foreign partners and investors, as the articles from the Kingston and Port-of-Spain offices point out.

The Caribbean, however, is not the only area where tax and other exemptions can be found. Ireland is also trying to attract new industry and is offering incentives to foreign participation, and aid in one form or another for export-oriented firms. The article on page 42 explains how the government plans work.

COVER: A quick cross-section of industrial activity in the Caribbean shows a benzene tower in Trinidad, dock-side trading at Nassau and, fingers moving too fast for the camera, a woman making a baseball for the North American market in a Jamaican factory.

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Canada and the Caribbean...

...Old Partners in Trade

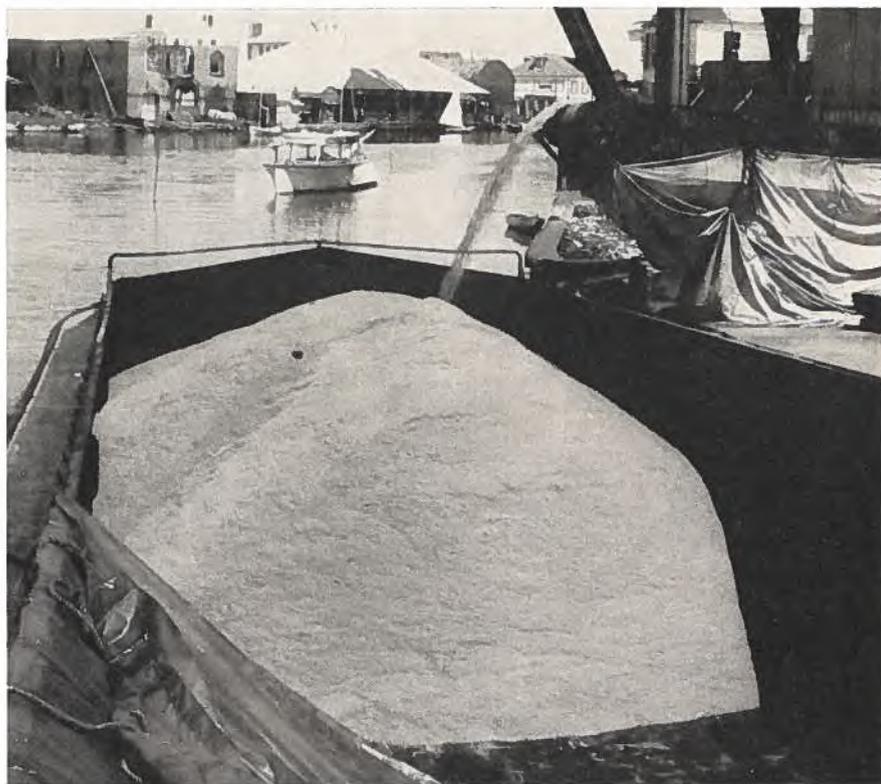
Our exports to this area increased from \$85 million in 1964 to \$120 million last year, but changes are taking place and new opportunities are opening up, as this article points out.

DAVID J. McJANET
Caribbean Division
Office of Area Relations

At this time of year, many Canadians have begun to think of sun, sea and sand. Trade relations with the Caribbean, however, have been a year-round preoccupation with Canadians for quite some time. These links can be traced back some 200 years, when cod, lumber, sugar, rum and molasses ruled supreme in commerce between the Maritimes and the islands to the south. These items of trade still play a key role in our bilateral trade relations, but our associations have now broadened into a complex and sophisticated network.

Other articles in this issue of *Canada Commerce* indicate what changes are taking place in the West Indian market and in investment opportunities there. This article describes the environmental framework in which these changes are occurring.

By Commonwealth Caribbean, we usually mean Barbados, Guyana, Jamaica, Trinidad and Tobago, the Bahamas, British Honduras (Belize), the Leeward and Windward Islands, the Caymans, the British Virgin Islands,



The Commonwealth Caribbean still relies largely on agricultural products, chief of which is sugar, for economic prosperity. Here sugar from British Honduras is being loaded aboard a barge for transshipment to a freighter and eventual export.

Turks and Caicos and Bermuda. (Bermuda is included because it is a party to the Canada-West Indies Trade Agreement of 1926.) Some four and a half million people live in the region, and it is estimated that their per capita income is substantially higher than that in developing countries in Africa and Asia. The area's proximity to the North American continent has whetted the appetite of its residents for North American goods and services, particularly in the consumer goods field, but economic development has also created a lively demand for capital equipment and industrial raw materials. Close to two thirds of Canadian exports to the region take the form of end products.

Total Commonwealth Caribbean imports have amounted in recent years to some \$1.5 billion annually,

with Britain, the United States and Canada the principal suppliers. Canada's share of the region's imports has remained relatively stable at close to 9 per cent. This represents a higher degree of penetration for Canadian exports than in any other market for Canada except that of the United States. Tariff preferences extended to Canada under the terms of the Canada-West Indies Trade Agreement have helped to maintain our share of the market in the face of increasing United States competition. In fact, about 86 per cent of Canada's exports to the Commonwealth Caribbean enjoy preferential tariff access—a higher percentage than in any other preferential market to which Canadians have access except that of Australia.

Canadian exports to the Commonwealth Caribbean have been ris-

ing steadily in recent years—from \$85 million in 1964, to \$108 million in 1967 and close to \$120 million in 1971. Our imports from the region tend to fluctuate according to changes in prices and volumes in the few major commodities which dominate the trade, and are estimated at about \$90 million for 1971.

Canada's exports to the West Indies have been hampered recently by the increasing use of import restrictions imposed to protect new industries. They are used more intensively in those countries experiencing rapid industrialization—Trinidad, Jamaica and Guyana—and to a lesser degree in Barbados. The 1966 Protocol to the Canada-West Indies Trade Agreement provides for consultation between governments on industrialization measures which adversely affect trade. Consultations have been held under this provision on a number of occasions.

CARIFTA—In an effort to provide a larger domestic market for new industries and to form a more viable base for agricultural diversification, the Commonwealth Caribbean countries established the Caribbean Free Trade Association (CARIFTA) in 1968. A substantial proportion of intra-regional trade has consequently been placed on a duty-free basis. Trade between member countries (all of the Commonwealth Caribbean except the Bahamas, the Caymans, the British Virgin Islands, Turks and Caicos and Bermuda), which in 1967 amounted to \$45 million, rose to nearly \$60 million in 1969, with further modest increases since then. Trinidad and Jamaica, as the most industrialized of the CARIFTA members, have experienced the most dramatic benefits. However, in recognition of the interests of the lesser developed signatories and the general goal of regional economic integration, the agreement also provides for co-operation in trade in agricultural products, harmonization in applying fiscal incentives to attract foreign investment, and identification of industries most suitable for the smaller islands. CARIFTA member countries are also working toward the adoption of a common external tariff.

CARIFTA has, by and large, posed only minor problems for Canadian exports. Local production of manufactured items, particularly capital equipment, is still limited in range,



A workman checks one of the controls on the natural gas supply lines for Port-of-Spain's 100-megawatt thermal power plant. This plant was built with the help of a World Bank loan and is indicative of the region's rising industrialization.

and consequently CARIFTA has had only a moderate effect on imports from Canada. In the long run, in fact, CARIFTA is expected to create new opportunities for increased Canadian trade with the area.

Canadian Investment—Other articles in this issue refer to the tendency of trade to be closely linked with investment. Canadian private investment in the Commonwealth Caribbean, though not as pronounced recently as United States investment, continues to expand from an already substantial base. Prior to the acquisition by the Government of Guyana of the assets of the Demerara Bauxite Company in mid-1970, Canadian investment in the region was estimated to be more than \$500 million. In fact, the Caribbean is Canada's third largest area for private investment. As well as aluminum interests in Jamaica, Canadian investors are also active in the secondary manufacturing field, including chemicals, paints, soaps and detergents, optical lenses, switchgear,

packaging material, flavoring essences, macaroni products, milling, metal furniture, lumber, sporting goods and kitchen utensils. More than 60 Canadian companies now own or operate tourist complexes in the area. Canadian commercial banks have for generations been leaders in financing local commercial activities and in providing general banking facilities. Similarly, Canadian insurance companies have been serving the West Indian community.

Canadian investment abroad has received incentive from the foreign investment insurance program of the Export Development Corporation. Since this program was introduced about a year ago, more investment in the Commonwealth Caribbean has been covered by this form of insurance than in any other area.

Like many countries, those in the Caribbean are seeking more effective local control of their economic systems. In line with this trend, Cana-



dian banks in Jamaica and Trinidad are incorporating locally and, in some cases, are planning to offer sizeable amounts of their shares to local investors. Many other Canadian investors, both new and old, have been able to work out arrangements whereby majority control is exercised by West Indian residents. Joint ventures and management contracts have been found to be effective vehicles for participating in the region's economic development.

Trade Relations

A number of developments are emerging in the West Indies that will be of considerable relevance to Canada's trade relationship with the region. These relate in part to efforts by the region to maintain access for exports of basic materials to world markets and to diversify into new export product areas.

EEC Enlargement—With the entry of Britain into the EEC, important issues arise with respect to Commonwealth Caribbean exports to Britain and the Continent in the agricultural field. The EEC has offered developing Commonwealth countries a variety of forms of association or special trade agreements, the negotiations for which should be concluded by 1975. It has also recognized Britain's contractual commitment to member countries of the Commonwealth Sugar Agreement up to the end of 1974. The possibility of some special arrangement being negotiated by the Commonwealth countries, either individually or as a region, would probably leave implications for the preferential status which Canadian products currently enjoy in Caribbean markets.

Generalized Preference Scheme—The proposal by a number of developed countries to grant tariff preferences to developing countries and the likelihood that this would alter present world trading patterns also has direct implications for Canada-Commonwealth Caribbean trade relations. Canada intends to participate in this Generalized Preference Scheme (GPS) and believes that, under it, Caribbean exports will have easier access to countries which do not now extend tariff preferences to the Caribbean. The GPS would, therefore, help West Indian efforts to increase and diversify exports.



This 300-acre industrial estate, one of three laid out by the Jamaican Development Corporation, lies just outside Kingston. There are two other estates in the country, one of them on land reclaimed from the Montego Bay Harbor area.

Sugar—The Commonwealth Caribbean has not recently been a steady supplier of raw sugar to Canada. Last year it supplied only 15 per cent of total Canadian raw sugar imports. Nevertheless, because of the continued importance of sugar to the economy of the West Indies—both in foreign exchange earnings and employment—Canada-Commonwealth Caribbean trade relations revolve largely around this commodity.

As an expression of Canada's concern for economic development in the area, in 1966 the Canadian Government initiated a program of direct annual payments to the Government of each Commonwealth Caribbean sugar-exporting country of an amount equal to the duties collected by Canada on imports of West Indies sugar (29 cents a cwt.), up to a maximum of 275,000 metric tons annually. These sugar rebates, as they are now known, amounted to slightly over \$1 million in 1967 and 1968, but have since been less because exports have dropped.

At the end of 1969, Canada started discussions with Commonwealth Caribbean Governments on the establishment by Canada of a \$5 million Agricultural Development Fund for the Caribbean to support agricultural production improvement programs. The Canadian Government has allocated \$2.5 million of this Fund to the Caribbean Development Bank, to be administered by this Bank of which Canada is a non-re-

gional member (see article on page 5). At the time, Commonwealth Governments strongly urged that it not replace existing sugar rebates. Following a special series of visits to the region by Senator Paul Martin late in 1970, it was decided to continue these rebates until the end of 1971.

In recent months, the Canadian Tariff Board has been examining the economic effect of the Canadian tariff structure on imports and prices of refined sugar, on refiners' margins and on sugar beet production in Canada. West Indian sugar producers also presented a brief to the Board. The Board's report has now been published and is being studied by the Canadian Government in the light of the sugar rebate.

The Commonwealth Caribbean, with 18 separate political units, presents Canada with a complex set of trade relations considerations. The area wants greater economic self-reliance, but continues to seek an expansion of its relations with old trading partners such as Canada. Although it is striving—with marked success—to diversify its economic base, it still relies for its economic prosperity largely on trade in traditional agricultural products. For Canada, this combination of forward looking hopes and long-established associations represents an opportunity to participate further in an exciting experience of joint development.



JEAN-GUY TARDIF, Assistant Commercial Secretary, Port-of-Spain

The Caribbean Development Bank came into being formally with the signing of an agreement in Kingston, Jamaica, in October 1969, by its 18 members following negotiations begun in 1966. The Bank, whose president is Sir Arthur Lewis, has a capital of U.S.\$50 million, subscribed by 16 regional members and two non-regional: Canada (\$10 million) and Britain (\$10 million). These resources are used to finance ordinary operations by lending at commercial rates. In addition to its equity and other funds, the Bank may borrow on capital markets.

The Bank has also established a Special Fund to which Canada and Britain are each contributing U.S.\$5 million, and the United States \$10 million, and an Agricultural Development Fund to which Canada has contributed \$2.5 million. Procurement for projects financed from the Bank's Ordinary Capital Resources and from the Special Fund is open to all Bank member countries and to the United States. Procurement from the Canadian-financed Agricultural Development Fund is open to international competitive supply.

To carry out its objectives of contributing to the development of the area and promoting economic co-operation and integration among the regional members (with special emphasis on helping the less developed countries), the Bank has the following functions:

1. Assisting regional members to co-ordinate their development programs to help them make the best possible use of their resources.
2. Mobilizing additional financial resources.
3. Financing projects for the development of the region.
4. Providing for public and private investment funds by guaranteeing loans and supporting the establishment of consortia.
5. Supplying technical assistance.
6. Assisting in regional efforts to create locally controlled financial institutions and capital markets.

These functions were set out in the original agreement. To what degree have they been carried out since the Bank started operations in early 1970?

First, the Bank had to be set up as an organization, staff recruited, rules established for the Special Fund, standard loan conditions drafted, and rules made for procurement and to provide for documentation. Then, as required in the Charter, it started paying particular attention to the "special and urgent needs of the less developed members of the region."

With the help of British and Canadian bilateral aid, considerable improvements have taken place in the infrastructure of the member countries. If this activity is to continue viable, however, it must be paralleled by expansion of the productive sectors.

The current strategy of the Bank tends to concentrate on agriculture, industry, tourism, and infrastructure directly related to these sectors.

Agricultural projects include lending to Governments for financing Land Authority types of development, such as feeder roads, terracing, drain-

age, reclamation; lending to Agricultural Credit Banks for relending to small farmers for farm improvement schemes, and lending to larger estates for production of livestock and various tree crops.

In April 1971, the Caribbean Development Bank made its first two agricultural fund loans—to the St. Vincent Agricultural Co-operative Bank for \$250,000 and to the Agricultural Credit Bank of St. Lucia, also \$250,000. Priority is given to the purchase of machinery and related equipment by small farmers to improve land utilization. Three more credits, each for \$250,000, have also been approved for Grenada, Dominica and St. Kitts, plus \$100,000 for Montserrat, under the same terms—that is, for relending by the local Agricultural Development Banks for agricultural improvements.

Industry is encouraged by Bank loans to Governments for industrial infrastructure, industrial parks, vocational or technical training, for lending to workshops and small industries, and for lending to larger industrial firms needing more than \$50,000.



Development and industrialization need substantial infrastructure improvements, an example of which is the new four-lane Southern Main Highway in Trinidad. Here workers can be seen building an overpass to the as yet unfinished highway.



Booklets Published by the Caribbean Development Bank

Loan Conditions

Deals with miscellaneous provisions which are inserted in loan agreements—approximately 20 pages.

Financial Policies

Outlines the purposes for which the Bank makes loans and the eligibility of borrowers—approximately 7 pages.

Guidelines for the Choice of Consultants

Tells how the Bank or the borrowers appoint consultants and who is eligible—approximately 5 pages.

Guidelines for the Procurement

Describes how, what and where the Bank purchases, specifications, bid openings, evaluation, and contract awards—approximately 8 pages.

Special Development Fund Rules

Explains contributions, special operations, investments, repayments, accounting, administration, etc.—approximately 12 pages.

Interested parties can obtain copies of these brochures directly from the Bank, the Canadian Trade Commissioner's office in Trinidad, or from the International Financing Branch of the Department of Industry, Trade and Commerce in Ottawa.

The Bank is about to commission architectural studies of how to design small hotels cheaply, as an aid to the tourist industry. It has already made a study of the cost of operating small hotels. A UNDP adviser will shortly join its staff to set up small hotel projects and to advise on building and operation. The Bank is concentrating on small hotels because in this field money and expertise are hard to come by in the less developed territories. They are not ruling out large hotels altogether and, in fact, its first tourism loan of \$750,000 was made to St. Lucia in early 1971 to build a luxury hotel. In addition to providing 27 per cent of the financing, the Bank also guaranteed a loan of \$300,000 from the Hessische Landesbank of Frankfurt, Germany. The relationship with the German bank gives the Bank access to the German money market.

Many Bank-assisted projects have already reached an advanced stage.

For example, seven islands have applied for loans on concessional terms to finance new port facilities and wharves. Obviously not all these requests will be granted but some will be, perhaps with modifications.

Up to the end of October 1971, the Bank had extended \$4.7 million for 14 projects, of which two are in the tourism sector, six are agricultural credits, four to national development banks for relending to small industries, one to an agricultural company, one to the Belize Electricity Board in British Honduras for electricity generation and distribution.

Canadian firms can benefit from the Caribbean Development Bank in a number of ways. Consulting firms should establish correspondent relationships with or become partners in local consulting organizations in various fields, ranging from basic infrastructure development (roads, electrification, etc.) to the more specialized areas like plant improvement, manufacturing efficiency, increasing productivity, etc. The Bank will make more and more use of consultants for appraising, costing and implementing projects and Canadian consultants should register their interest with the Bank. The Bank requires that, when necessary, borrowers employ consultants and it states in its brochure that "the employment of regional firms (consulting either alone or in combination with foreign firms), is encouraged where such firms are to be qualified to perform the work."

Canadian manufacturers of agricultural equipment should also inform the Bank about their products by sending illustrated brochures and prices not only to the Bank itself but also to the various agricultural credit banks of the member territories. (The Bank's address is P.O. Box 408, Treasury Building, Bridgetown, Barbados, W.I.) Cables: CARIBANK, BARBADOS.

A growing number of manufacturers in Canada have established branch operations or joint ventures in the Caribbean. They also are eligible for assistance from the Caribbean De-

Capital Structure of the Bank

	Subscriptions U.S.\$ million
Regional Members	
Jamaica	11.2
Trinidad and Tobago	7.7
Bahamas	3.3
Guyana	2.4
Barbados	1.4
British Honduras	.5
Grenada	.5
St. Lucia	.5
Antigua	.5
St. Vincent	.5
Dominica	.5
St. Kitts-Nevis-Anguilla	.5
Montserrat, Turks and Caicos Islands, British Virgin Islands, Cayman Islands	.5
Non-Regional Members	
Canada	10.0
Britain	10.0
Special Development Fund	
U.S. AID line of credit	20.0
Canada	5.0
Britain	5.0
Agricultural Fund	
Canada	2.5

velopment Bank, especially if they are located in one of the less developed territories.

These are some of the ways in which the Caribbean Development Bank can co-operate with Canadian firms. Many more will undoubtedly develop over time and will be reported as they materialize. The important fact is that the Caribbean now has its own financial organization, geared to the needs and aspirations of the region. Canadian firms wishing to play a part in this activity should immediately make themselves known to the Bank at its headquarters in Barbados for eventual consideration and participation when projects are tendered.

For up-to-date information on approved projects, contact the International Financing Branch of the Department of Industry, Trade and Commerce in Ottawa or the Commercial Division, Canadian High Commission, P.O. Box 1246, Port-of-Spain, Trinidad, W.I.



Kingston Reports...

Joint Ventures in Jamaica

They offer a way to help the country develop, a means to ensure continued Canadian access to the market and are increasingly popular with foreign firms.

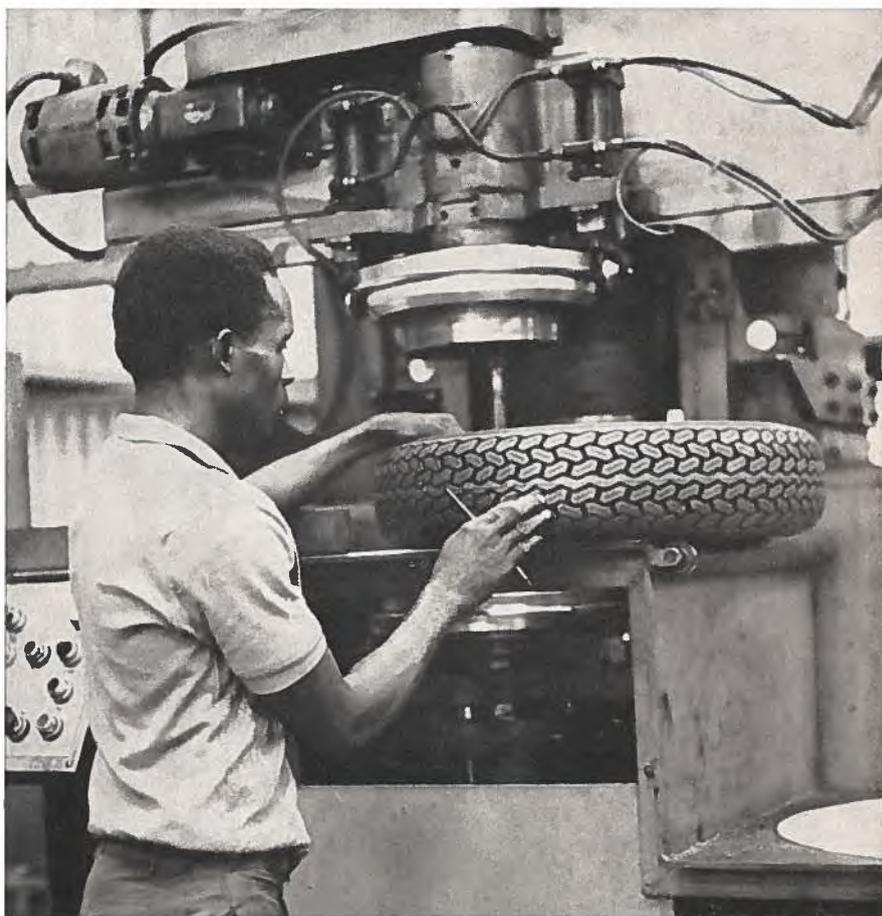
JOHN H. LANG, Assistant Commercial Secretary, Kingston

Canadian exporters seriously interested in the Caribbean market generally, and in Jamaica particularly, should take note of developments in the area—especially the trend toward the establishment by foreign firms of manufacturing, assembling or processing facilities on a joint venture basis.

In emerging countries, a feeling of economic nationalism is close to the surface of government policy toward foreign-held manufacturing facilities, and it is, therefore, advantageous to any foreign firm to have local equity participation in any type of operation.

Why bother about setting up a Jamaican operation? First, participation in a Jamaican manufacturing facility can safeguard Jamaica as an export market; second, it can be profitable; third, a foothold in Jamaica is a toehold in CARIFTA, the Caribbean Free Trade Association.

Let's consider the first reason—safeguarding Jamaica as a market for already established or new exports. Jamaica, like other developing countries, is trying to lessen its dependence on agricultural production. The Government is attempting to establish a more diversified economy, and to this end pursues a policy of import replacement. This means there is active government pressure to establish local manufacturing facilities that will employ Jamaicans and curb imports, thus saving foreign exchange. To ensure that newly-founded Jamaican industry does not founder on the shoals of competition from well-established foreign manufacturers, the Jamaican Government prohibits the import of competitive products. This move has almost always guaranteed success to new local



A tire undergoes tests in the Goodyear Jamaica plant in Morant Bay in Jamaica. This factory, which has 40 per cent Jamaican ownership, produces more than 90 per cent of the island's passenger, truck and heavy-duty tires and tubes.

industries. Foreign suppliers of the product in question are usually left out in the cold, unless they have a share in the new industry and have arranged to provide it with raw materials, components, or technical assistance.

There seem to be few products incapable of being manufactured in

Jamaica. The list of restricted imports has grown to nearly 200 items and continues to grow as the range of local manufactures broadens. Recent additions to the list of "Made in Jamaica" items include tires, auto batteries, safety matches, carpets, and electric cable. In each case there is



participation by foreign firms that formerly exported the finished product to Jamaica and competed with other foreign producers. Now they no longer worry about foreign competition.

But it should be remembered at this point that Jamaica, as a party to the Canada-West Indies Trade Agreement and the 1966 Protocol, has undertaken to consult on measures to encourage economic development that might substantially affect the trading interest of Canada. Canada, therefore, has the right to consult when Canadian export interests are threatened or injured by these measures.

This leads us to the second argument for participation in Jamaican joint ventures—profits. No evaluation of the advisability of setting up shop in Jamaica should be undertaken without first considering the incentives offered by the Jamaican Government through its Jamaica Industrial Development Corporation.

The Industrial Incentives Law provides for a 10-year exemption (15 years in special cases) from income tax to qualified industries that set up manufacturing facilities in Jamaica. It also provides relief from customs duties and tonnage on machinery and equipment. Keeping in mind that pioneer industries are protected from foreign competition, profits are almost assured. There are, incidentally, no death duties in Jamaica. Of 165 manufacturing companies in Jamaica operating under incentive legislation in 1969, 54 were entirely foreign-owned and 49 were owned jointly by foreigners and Jamaicans. Non-Jamaican interests were involved in roughly 62 per cent of these companies. At present, there are 57 companies operating in Jamaica that are entirely or partly owned by Canadian interests.

It is not our intention to include here all the information usually found in the industrial promotion brochures. It is enough to say that in Jamaica wages are reasonable, the Government is stable, the currency strong, the weather good, a sophisticated financial infrastructure is present, and the location is central to CARIFTA. Total Jamaican trade within CARIFTA has grown from Cdn.\$6.5 million in 1968 to \$21 million in 1970.



Girls assemble parts of a switchboard at a plant in Jamaica. In 1970 Canada sold telephone equipment and parts worth nearly \$4.8 million to this country.

Financing the establishment of a local firm can be done through any of the eight commercial banks—four of which are Canadian—located in Jamaica. Depending on the nature and extent of the facilities planned, financing may be available from the Jamaica Development Bank, an institution funded in part with Canadian aid money. The Bank's purpose is to promote industrial expansion in Jamaica by making financing available at softer-than-commercial rates. Some foreign-held operations in Jamaica are financing expansion through the Jamaican stock market, a popular method of offering equity to Jamaican investors and thus becoming, at least in part, a "Jamaican" firm.

Canadians who wish to visit Jamaica and explore the possibilities of a joint venture will be interested in the Canadian International Development Agency's Investment Incentives Program, under which financial assistance

may be given to Canadian companies wishing to make starter and feasibility studies of investment opportunities in developing countries.

Canada's Export Development Corporation is soon expected to bring into operation for Jamaica a foreign investment insurance scheme through which Canadian investors can insure themselves against the risk of loss through war, civil insurrection, expropriation, or exchange inconvertibility.

Companies that have been treating the Caribbean as a fragmented but attractive export market are in clear danger of being displaced unless they make some investment commitment in local manufacturing, assembling, or processing. Detailed information about every aspect of investing and doing business in Jamaica can be obtained from the Commercial Secretary, Canadian High Commission, P.O. Box 1500, Kingston 10, Jamaica.



A Caribbean Fish Story

Last year Jamaica imported close to 40 million pounds of fish in all forms. Stores both in Jamaica and the Bahamas are increasingly featuring frozen fish and this article tells you how to go about filling their freezers.

JOHN H. LANG

Assistant Commercial Secretary

JENNIFER EUSTACE

Commercial Officer, Kingston

Fish constitutes a major protein source in the diet of Jamaicans but few Canadians realize to what extent this market relies on imported fish and fish products from northern waters. The Jamaican national dish, "Ackee and Saltfish," is, in fact, ideally prepared with good Canadian salted cod.

Estimates of the domestic fisheries catch (actual figures are not available) vary between 20 million and 40 to 45 million pounds; the former is probably the more realistic. The 1970 provisional import statistics show imports of 19.7 million pounds of fresh, frozen, salted and pickled fish and almost the same volume, 19.05 million pounds, of canned fish. Jamaica thus provides only one third of its requirements. Where do the remaining two thirds originate? Canada is the major supplier of salted and pickled fish but in the frozen fish market we are out in the cold—a situation that can be remedied through aggressive selling by Canadian exporters. Canada last year supplied 11.3 million pounds out of a total of 12,375,400 pounds of codfish, for instance, which is shipped dry salted. The next biggest supplier of this commodity was France, with 662,000 pounds. But Canada supplied only about 81,700 pounds of "fresh, chilled, frozen, etc." fish (including salmon and trout) out of a total of about 851,400 pounds.

For a long time the market in Jamaica for salted and pickled fish has been virtually insatiable but, with supplies of this type diminishing, Jamaicans are obliged to turn to the modern frozen product. The major drawback to frozen products in the past—lack of refrigeration in rural areas—has been largely overcome, and even the smallest grocery store now operates at least some form of cooling unit.



The attraction here, believe it or not, is the crawfish being fished out of the warm Bahamas waters. In this area fishing is mainly for tourists and the only gear allowed for crawfish is the Hawaiian sling and the pole, seen in the diver's hand.

Local fish importers have turned mainly to the United States for their supplies of fresh and frozen fish. The first reason for this, obviously, is proximity, with both Florida and Gulf ports within a couple of hundred miles. The second is the nature of the catch: warm waters surrounding the Southern States yield the same species as local waters—kingfish, snap-

per, and jack, etc. Such fish are seldom marked as imported in the retail stores and are assumed by the uninformed customer to be local.

One government restriction, the quota system, can actually benefit the Canadian exporter. To protect the local fishing industry, import of fresh whole fish is subject to an annual



quota of 500,000 pounds, distributed quarterly on the recommendation of the Fisheries Division, Agricultural Planning Unit. This quota, however, is applicable only to warm water fish, mainly kingfish, and virtually the entire quota is filled by imports from the United States. Any fish from cold waters is termed luxury fish—even pollock and ocean perch fall into this category. Import licences are required, but they are issued freely.

Jamaicans prefer whole fish because they like to be able to recognize what they buy. Apart from kingfish, the main species imported in bulk are

cod, fresh herring and smoked cod fillets. All the major supermarkets have shrink-wrapping equipment and the bulk fish is packaged in approximately one-pound quantities in the store warehouse. With the exception of some fresh cod, this area of the market is dominated by Britain, but sources in the trade see no reason why Canada could not take over as the major supplier. Price appears to be the only factor considered—the landed c.i.f. price of a 14 pound box of smoked cod fillets is \$7.93, and it retails for 76 cents per pound.

Although fairly limited, there is some market potential for such commodities as packaged frozen fillets, fish fingers and breaded fish steaks. This type of fish is sold mainly in the Kingston area. Several well known British brands are available (Birds Eye, Findus, Mudd, Macrae, for instance), but a lot is of Danish origin.

In a recent supermarket survey, Canadian packaged fish was conspicuous by its absence. Some stores had no Canadian products at all, others had a few one-pound and three-pound packages of ocean perch, retailing at 72 cents and \$2.06 respectively.

As the types and sizes of packaged fish are so varied, the supermarkets purchase through four or five main local agents (see accompanying box) who stock the complete range of those firms they represent, but are ready to handle any line in fish. These agents already handle a large volume of other Canadian foodstuffs and are favorably disposed towards Canadian goods as a whole. Price is the major consideration and, as Table 1 indicates, there is a good margin of profit here. There is no duty payable on either fresh or frozen fish—shipping charges, therefore, are the only extras to be added to Canadian wholesale prices.

The hotel trade makes great use of luxury fish such as frozen salmon and rainbow trout—even halibut and perch—and the exporter should not overlook this lucrative side of the market. Hotels normally buy through the same agents as the local supermarkets do. So by supplying the one agent, a Canadian exporter is able to cover both sides.

Bahamas—Although the 700 islands and thousands of cays which make up the Commonwealth of the Bahamas are surrounded by some of the best fishing waters in the world, the Bahamas imports a substantial and increasing part of its fish requirements. Fishing is done mainly by tourists for sport, or by Out Islanders for immediate protein needs. The greater part of the population lives in Nassau and Freeport and is engaged primarily in the tourist industry. These people import nearly everything they drink, wear, drive and eat—and fish is no exception.

Local fishermen can almost keep up with the demand for local fish such as grouper, jack fish, yellow tail, snapper and conch, but an ever-increasing amount of frozen fish is imported to satisfy hotel and supermarket requirements for exotic, non-local varieties.

Table 2 indicates where this fish comes from. The figures include fresh fish, but this makes up a very small portion of the total.

Even though the statistics do, to a certain extent, underestimate our sales because they include transshipment of Canadian fish in the United States figure, Canadian exporters hold a far from impressive share of this market—about 1 per cent in terms of value. We are, after all, the nearest Commonwealth producer and should be in a position to command a much larger share. At least part of the fault lies in the failure by Canadian producers to pursue sales opportunities here.

Canada starts out with a significant advantage over competitors. First, fish from Commonwealth countries face a rate of duty of 18 per cent (10 per cent plus 7.5 per cent emergency tax, in force since the war, plus 0.5 per cent stamp tax), compared with 28 per cent (20 per cent plus 7.5 plus 0.5) facing products of non-Commonwealth origin. Second, most Canadian products are similar to the American ones with which the Bahamians are familiar and for which market acceptance is high. Third, Bahamian wholesalers sometimes find it advantageous to stock Canadian—retailers are not so apt to phone an order direct to the supplier.

TABLE 1

SELECTED RETAIL PRICES IN JAMAICA

	\$
Cod steaks, packed locally, per lb.	0.41
Cod fillets, 14 oz.	0.66-1.18
Cod steaks, 7 oz.	0.60
Cod in batter, 8 oz.	0.63
Cod portions, breaded	
6 oz.	0.35
8 oz.	0.54
Haddock fillets, 14 oz.	1.13
Haddock portions, breaded, 6 oz.	0.45
Plaice, boneless, 8 oz.	0.72
Plaice, fillets, 12 oz.	1.05
Fish fingers, 9 oz.	0.56
12½ oz.	0.73
Fish cakes, 8 oz.	0.38
Rainbow trout, whole, approx. 8 oz.	0.73
Salmon sides, per lb.	4.96
Salmon steaks, per lb.	1.22
Kippered herring, 8 oz.	0.41

TABLE 2

BAHAMA'S IMPORTS OF FRESH OR FROZEN FISH, 1970

	lb.	U.S. \$
United States	432,513	316,204
Britain	39,182	34,493
Canada	4,256	3,624
Ireland	2,022	2,344
Denmark	1,413	769
Others	2,099	1,364
Total	481,485	358,798

Which products will sell? Basically, all convenience or prepared fish products are in demand at retail. Purchasing habits of the Bahamian housewife are practically identical to those of her counterpart in Miami, which means that the emphasis is more and more on convenience items. The hotels and restaurants require institutional packs of staple and gourmet fish products.

There are four channels through which you can sell.

1. Through local wholesalers (see box). The importing wholesalers in Nassau and Freeport are plagued by the nearness of Miami which allows retailers to order directly from brokers and large-volume wholesalers there at a price often lower than that which local wholesalers can offer. As soon as a brand name becomes a household word, the Bahamian wholesaler finds his customers ordering it through itinerant brokers who will give them a good "introductory" price. For this reason wholesalers in Nassau and Freeport feel more comfortable with, and are always on the lookout for, potentially successful products which originate farther afield than the yellow pages of the Miami telephone directory.

2. Direct to retailers. This avenue is not generally recommended for Canadian suppliers. Freezer space is at a premium. That is why retailers prefer to place small but frequent orders in Miami for most of their popular frozen food items. This leads us to the next alternative.

3. Through Miami. This city is in many ways the headquarters for Bahamians. There are inexpensive flights between Miami and Nassau and Freeport almost hourly. Most Bahamian businessmen know Miami almost as well as Nassau. Nearly all channels of communications with the outside world, including shipping, are routed through Miami. It is not surprising therefore that most imported goods either originate in, or pass through, this city. Wholesalers in Miami will on occasion stock foreign products in bond for reshipment to the Bahamas or Caribbean area, but normally the only items stocked are those which they can also sell locally. A Canadian exporter using Miami as a springboard to the Bahamas must usually first establish himself in the Florida market.

Agents and Distributors

JAMAICA

Bulk frozen fish

Fish Importers Ltd.,
140 Barry Street,
Kingston.

Frozen packaged fish

T. Geddes Grant (Distributors) Ltd.,
109 Marcus Garvey Drive,
Kingston 11.

Grace Kennedy & Co. Ltd.,
64 Harbour Street,
Kingston.

Levy & Salmon Ltd.,
23 - 2nd Street,
Newport West,
Kingston.

Chas. E. Ramson Ltd.,
55½ West Street,
Kingston.

BAHAMAS

Wholesalers

D'Albenas Agency,
P.O. Box 221,
Freeport, Grand Bahama.

Asa H. Pritchard Ltd.,
Palmdale Centre,
Nassau, Bahamas.

Solomon Bros. Ltd.,
P.O. Box 318,
Freeport, Grand Bahama.

Retail Outlets

City Markets,
Palmdale Centre,
Nassau, Bahamas.

Super Value Supermarkets,
Mackay and Madeira Street,
Nassau, Bahamas.

Food Fair Stores Inc.,
P.O. Box 316,
Freeport, Grand Bahama.

Freeport Stores Ltd., (Winn Dixie)
P.O. Box 457,
Freeport, Grand Bahama.

H. Salt Co.,
Bay Street,
Nassau, Bahamas.

Forwarders/Warehouses

G.B. Port Authority,
International Bazaar,
Freeport, Grand Bahama.

Freeport Transfer Ltd.,
P.O. Box 263,
Freeport, Grand Bahama.

It should be noted, however, that products of Canadian or other Commonwealth country origin reconsigned from Miami to Bahamas or other Caribbean areas do not qualify for preferential treatment. The effect of this lack of tariff preference on the competitiveness of the product would, of course, depend upon other price factors, such as the f.o.b. value and transportation costs landed in the Bahamas.

4. As an alternative to Miami, the Canadian exporter seeking a distribution center for the Bahamas or, for that matter, for the whole southeastern United States, and Caribbean, would do well to consider using the warehousing services available in Freeport. Freight costs can be cut by shipping refrigerated container or trailer loads to Freeport and having the goods reshipped via air freight from this central point. The advantage of Freeport is that there are no duties, taxes

or bonding charges to contend with. It is possible that savings on shipping charges will enable the exporter to service small orders which might not be worthwhile if filled from as far away as Canada. Bulk shipments can be repackaged in Freeport if necessary to fit special orders, and guaranteed collection of accounts is offered by the forwarders, who will take orders from customers and handle shipping and billing on a client's behalf.

There is a market for Canadian fish in both Jamaica and the Bahamas but, as we have pointed out, selling calls for a certain amount of aggressiveness on the part of suppliers. If you want more information about it, or about contacts, write to us. Our address is: Commercial Secretary, Canadian High Commission, P.O. Box 1500, Tobago Road, Kingston, Jamaica.



Economic Conditions in...

Tourist industry, important to Caribbean, is being built up by many of the countries, opening up opportunities for Canadians in investment, construction market, among others. Jamaica's industrial sectors contributed to over-all 1970 surplus of \$26 million. British Honduras imports rose by 15.9 per cent.

...Jamaica

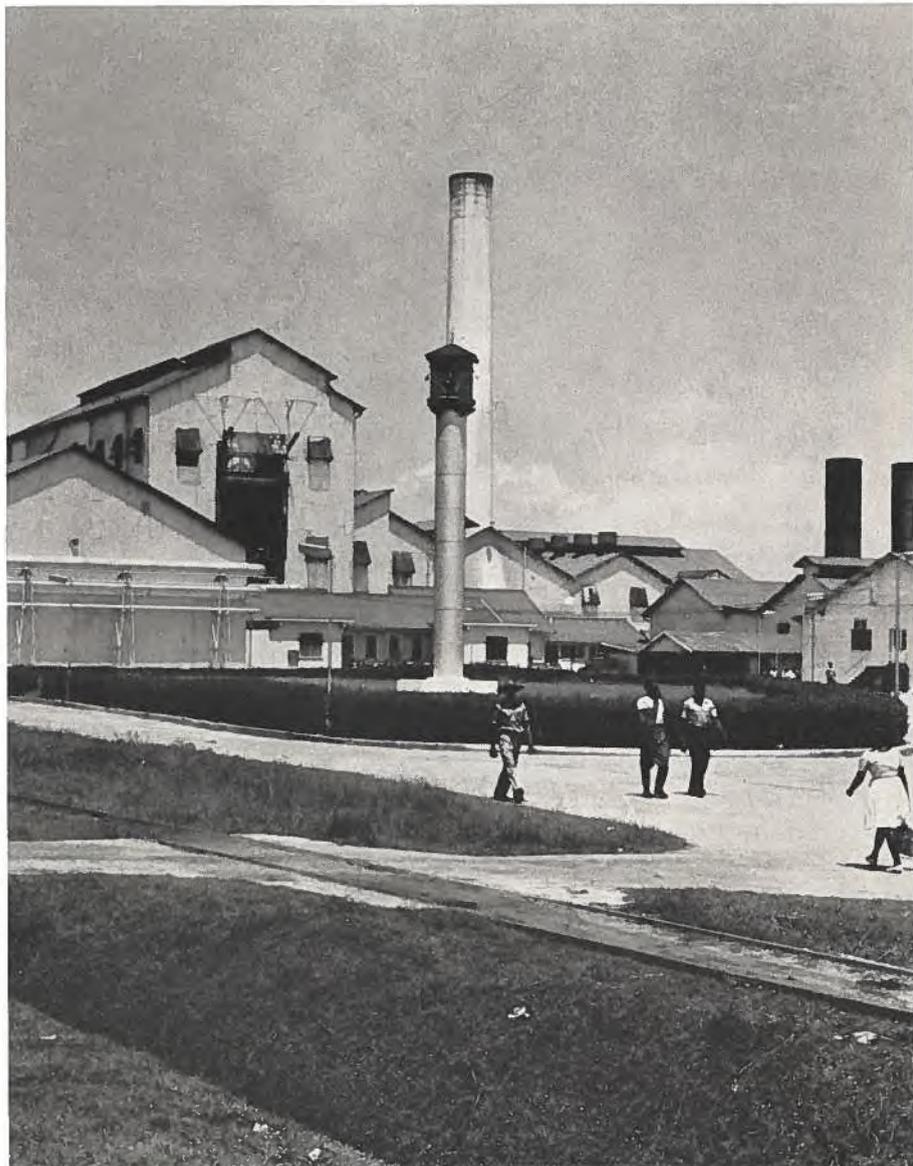
ARMAND BLUM, Commercial Secretary, Kingston

The Jamaican economy continued to move ahead during 1970. In terms of the increases in gross domestic product (GDP) the sectors that led the economy were mining (bauxite and alumina), central and local government, construction, manufacturing, trading. The agriculture (particularly export agriculture), utilities and financial institution sectors lagged behind.

Preliminary 1970 estimates show an over-all surplus of \$26.0 million* in the balance of payments, compared with a deficit of \$14.0 million in 1969. The current account deficit amounted to \$160.4 million but was more than compensated for by a capital inflow of \$186.4 million, of which \$173.2 million was from private flows. These private flows were associated mainly with construction and installation work in the bauxite and alumina industries, the public utility companies, hotels, residential and commercial building. At the end of 1970, total net foreign exchange reserves stood at \$125 million.

*On the basis of J\$1.00 = Cdn.\$1.25

This view of the Frome factory shows a typical Jamaican sugar mill. Like other countries in the Caribbean, Jamaica is trying to lessen its dependence on agricultural products which in 1970 dropped in terms of export value by 3.2 per cent from the previous year. Sugar, however, is still the second largest foreign exchange earner.



Total merchandise trade continued to grow during 1970 following a rise in incomes and in industrial activity and, at a total of \$898.4 million, showed an increase of 18.4 per cent over its 1969 level. Exports rose by 16.3 per cent to \$354.1 million, imports by 19.8 per cent to \$544.2 million, resulting in a visible trade deficit for 1970 of \$190.1 million.

Jamaica's main exports during 1970 were bauxite and alumina \$233.6 million, sugar \$37.5 million, bananas \$14.7 million, mineral fuels, lubricants and related materials \$9.1 million, clothing \$7.5 million, and citrus \$5.8 million. Its leading customers, with figures in millions, were the United States \$181.8, Britain \$55.1, Canada \$27.1, CARIFTA countries \$11.9 and the EEC \$5.5. Jamaican imports and their evolution over the past three years are shown in Table 1. Main suppliers in 1970, again with figures in millions, were the United States \$235.5, Britain \$104.3, the EEC \$53.9, Canada \$46.6, and CARIFTA countries \$9.2.

Trade with Canada—Total Canadian trade with Jamaica fell off by some 15 per cent during 1970 because of a substantial drop in Canadian imports from Jamaica. Tables 2 and 3 show our main imports from and exports to Jamaica for the period 1969-1970. It will be noted that the \$18.9 million decrease in Canadian imports from Jamaica is almost entirely accounted for by declines in sales of alumina (-\$16.3 million), as a result of reduced aluminum production in Canada, and raw sugar (-\$2.0 million) because of insufficient local production. Canadian exports to Jamaica, however, showed an increase of 15 per cent over the previous year. As Table 3 indicates, our sales to this market are now quite diversified and last year we exported goods from 584 of the total 1,131 Statistics Canada export classifications.

Agriculture—The performance of the agricultural sector in 1970 was mixed. Production of sugar, bananas, citrus, pimento and coffee declined, but copra, cocoa, ginger, rum and molasses improved. Total agricultural exports at \$70.5 million were 3.2 per cent smaller than those in 1969. The production of sugar—the largest agricultural export and second foreign exchange earner for the country after bauxite and alumina—was down by

TABLE 1

JAMAICAN IMPORTS, 1968-1970

Product	Jamaican \$'000		
	1968	1969	1970
Food	57,974	58,023	68,974
Meat and meat preparations	8,658	9,068	11,921
Dairy products, eggs and honey	8,332	7,646	10,088
Fish and fish preparations	7,958	8,805	8,605
Cereals and cereal preparations	20,486	19,065	24,491
Fruits and vegetables	3,760	3,781	5,160
Sugar and sugar preparations	688	2,725	2,360
Feeding stuffs for animals	6,226	4,891	3,901
Beverages and Tobacco	4,742	4,999	6,046
Beverages	2,354	2,742	3,442
Tobacco and tobacco manufactures	2,388	2,257	2,604
Crude Materials Inedible, except Fuels	8,468	10,264	10,165
Wood, lumber and cork	5,374	5,935	6,238
Textile fibers	882	688	858
Crude fertilizers and crude minerals (excluding coal, petroleum and precious stones)	1,288	2,092	1,249
Minerals, Fuels, Lubricants, etc.	22,912	25,300	27,893
Animal and Vegetable Oils and Fats	2,038	2,164	2,539
Chemicals	25,306	28,874	32,822
Chemical elements and compounds	7,588	7,815	10,064
Medicinal and pharmaceutical products	3,470	4,160	4,664
Essential oils and perfume materials	2,340	2,681	2,613
Manufactured fertilizers	2,600	2,915	2,810
Explosives and other chemical manufactures	8,440	9,577	11,280
Manufactured Goods	81,974	92,040	113,773
Rubber manufactures, n.e.s.	4,272	5,885	5,647
Paper and paper products	11,782	13,160	14,618
Textile yarn, fabrics, made-up articles	18,786	23,416	23,852
Non-metallic mineral manufactures	5,352	7,132	9,859
Base metals	19,634	20,706	30,651
Manufactures of metals	16,684	15,186	22,982
Machinery and Transport Equipment	90,244	111,702	139,842
Non-electrical machinery and apparatus	49,138	43,409	73,735
Electrical machinery and apparatus	20,594	24,871	34,717
Vehicles and transport equipment	20,512	43,421	31,390
Miscellaneous Manufactured Goods	26,096	29,260	32,571
Prefab buildings, sanitary plumbing, lighting fixtures and fittings, etc.	2,940	3,511	3,550
Clothing	3,550	3,241	3,261
Professional, scientific and controlling instruments	6,600	5,598	8,101
Miscellaneous manufactured goods, n.e.s.	10,620	13,623	14,518
Miscellaneous Transactions and Commodities	588	670	724
Total	320,344	363,300	435,350

Source: Economic Survey of Jamaica 1970, Central Planning Unit.

TABLE 2

CANADA'S MAIN IMPORTS
FROM JAMAICA, 1969-1970

Product	\$'000	
	1969	1970
Alumina	40,821.6	24,531.1
Liqueurs	481.1	664.7
Rum	418.0	525.3
Goods returned		
within five years	238.6	197.1
Cocoa beans and butter	116.5	170.3
Sweet potatoes, fresh	76.3	114.7
Shipments of less than \$200 each	75.0	112.3
Pimento, ground or unground	125.4	108.9
Ginger, ground or unground	78.4	100.1
Citrus fruits, canned, includ- ing mixtures	219.8	76.8
Raw sugar	2,016.1	nil
Other	1,311.1	465.8
Total	45,977.9	27,067.1

Source: Statistics Canada

3.4 per cent, from 383,000 tons to 370,000 tons. Consequently, exports dropped to 293,000 tons compared with 302,000 tons in 1969. Higher prevailing prices, however, led to a 5 per cent increase in value, from \$36 million to \$37.5 million. Total meat production, because of greater poultry and pork production, increased by some 5.4 per cent in 1970, although beef production fell by some 10.4 per cent. The vegetable sector showed general increases in 1970.

Tourism—Total number of visitors to the island rose in 1970 by 1.9 per cent to 414,720, but their average length of stay fell by 4.7 per cent. Tourist receipts are estimated to have risen by 5.3 per cent from \$94.5 million to \$99.5 million. The Jamaican tourist industry, like many others in the Caribbean, was adversely affected by greater international competition and the slower growth of the U.S. economy.

Mining—In 1970, bauxite and alumina continued to be the leading contributors to the GDP (\$199.9 million or 16.8 per cent) and to domestic exports (\$233.6 million or 67.3 per

TABLE 3

CANADA'S MAIN EXPORTS TO JAMAICA, 1969-1970

Product	\$'000		Product	\$'000	
	1969	1970		1969	1970
Telephone apparatus equipment and parts	5,018.1	4,757.7	Copper wire and cable, excluding insulated	291.6	375.6
Cod, salted	4,832.1	2,819.6	Shingles, Western red cedar	566.4	369.8
Wheat	2,029.7	2,491.9	Pumps, pumping systems and parts	387.4	366.1
Bars, steel, hot rolled	41.9	1,984.0	Railway, street rail- way rolling stock and parts, n.e.s.	19.9	345.8
Herring, canned	519.9	1,394.1	Mining, quarrying machinery and parts, n.e.s.	124.2	342.6
Sardine, canned	1,317.8	1,388.6	Insulated wire and cable	150.0	338.8
Newsprint paper	995.3	1,190.7	Broad woven fabrics, cotton, n.e.s.	469.6	329.5
Switchgear and protective equip- ment and parts	547.7	824.8	Onions and shal- lots, fresh	237.2	313.2
Milk powder, skim milk	550.9	654.0	Prefabricated build- ings, structures and parts, n.e.s.	310.1	311.8
Aluminum bar, rod, plate, sheet, circle	574.4	647.6	Excavating, dredg- ing equipment and parts	43.4	299.2
Aluminum pigs, ingots, shot, slabs, etc.	201.3	634.3	Printed matter, n.e.s.	340.6	296.9
Writing and repro- duction paper	338.9	583.3	Knitted fabrics	213.6	289.2
Malt	500.0	569.4	Industrial control equipment and parts	33.7	288.4
Upper leather, cattle	nil	553.3	Beans, dried, n.e.s.	232.3	284.5
Card punching, sorting and tabu- lating machines, electronic com- puters, and parts	16.3	520.6	Wheat flour, n.e.s.	253.9	275.1
Beef, cured	228.7	473.0	Measuring and testing equip- ment and parts, n.e.s.	294.1	274.7
Power boilers, equipment and parts	155.8	446.9	Sanitary paper	275.7	271.7
Medicinal and phar- maceutical prod- ucts, n.e.s.	357.6	446.3	Railway rails	nil	263.7
Plastic film and sheet	299.0	440.8	Conveyors, convey- ing systems and parts	24.8	253.7
Sheet and strip, steel n.e.s.	252.2	395.8	Other	16,909.0	17,060.9
Refrigerators and freezers, house- hold size	526.1	377.0	Total	40,481.2	46,545.0

Source: Statistics Canada

cent). Exports of bauxite ore declined by 3.8 per cent from 7.9 million tons to 7.6 million tons, but the lower figure was compensated for by a 41.7 per cent rise in exports of processed alumina, from 1.2 million tons to 1.7 million tons. Active exploration for copper is continuing.

The Government's receipts in royalties and taxes from the mining sector totalled \$39.6 million, a 48.8 per cent increase over the 1969 figure of \$26.6 million.

Manufacturing and Processing—In 1970 this sector was the second largest contributor to the GDP (\$160.1



This photograph, taken from the air, shows the Caribbean Cement Company's plant near Kingston. This plant exports its products throughout the Caribbean and contributed to the 9 per cent rise in 1970 in exports of cement and clay products.

million or 13.5 per cent). The most important contributing industries were food, excluding sugar (\$31.5 million); metal products and repairs (\$22.1 million); textiles and made-up textile goods (\$13.5 million); cement and clay products (\$13.1 million), and sugar, rum and molasses (\$13.0 million). The industries that exhibited the highest growth rates in 1970 in terms of the GDP were furniture and fixtures excluding upholstery (14.3 per cent); leather and leather products (12.6 per cent); footwear (11.8 per cent); wood and wood products, ex-

cluding furniture (9.3 per cent), and cement and clay products (9 per cent).

The economy is expected to continue its present performance over the next 12 months and Jamaica should remain a good market for Canadian consumer and industrial products. As local industry develops, the import market will become restricted (the article on joint ventures, page 7, suggests ways to overcome some of the effects of these restrictions). On the other hand, industrial raw materials and equipment will be needed for these industries. In the meantime, the

market for consumer products, particularly food, remains a good one; it accounted for 30.6 per cent of total imports in 1970. Machinery and equipment imports should continue to grow (25.9 per cent of total imports in 1970); construction and industrial raw materials should also increase.

If you would like more details on the opportunities for your product, or on how to sell to Jamaica, write to the Commercial Secretary, Canadian High Commission, P.O. Box 1500, Kingston 10, Jamaica.



...Bahamas

JOHN H. LANG, Assistant Commercial Secretary, Kingston

The Commonwealth of the Bahamas, an archipelago of some 3,000 sun-soaked islands, cays and rocks, stretches 500 miles in a southeasterly direction from a point about 60 miles off Florida.

There is little manufacturing in the Bahamas, and the level of agricultural production falls far short of self-sufficiency. The weather, however, could hardly be better, the sand whiter, nor the water clearer. These natural attributes, the islands' proximity to North America, and tax haven status have afforded the residents a standard of living comparable to that of Florida.

The bases of this prosperity, tourism and investment, are at best fickle, and the economy that depends on them can expect the odd downturn. The Bahamas are experiencing one at the moment.

The tourist industry, which accounts for approximately 70 per cent of GNP, had a poor off-season. Summer is never a good time of year for hotels, restaurants and gift shops, but never before have hotels actually closed down for lack of business during the summer months. The slowdown in the United States economy was largely to blame; about 90 per cent of visitors to the Bahamas are from the United States. Inexpensive transatlantic air fares have also diverted some business to Europe. Hotel occupancy rates are down, partly because of new construction over the past year, but also because a larger percentage of visitors are cruise passengers who eat and sleep aboard ship.

Unemployment has until recently been virtually unknown in Nassau and Freeport. Although no official figures are available, some estimates place it now as high as 5 per cent. The unemployed are mainly from the construction industry, but are also from hotels, restaurants and retail establishments which are finding that, even though tourist traffic has steadily increased, tourist spending is down.



What's so unusual about this picture? Just the plaques plastered over the front of the house, where a firm of lawyers has its offices. If you want to register your firm in the Bahamas, they will do it for a fee and the cost of a plaque.

The construction industry has felt the economic slowdown more than any other industry sector. Building starts have dropped off to zero over the past 12 months, and unless some new projects are started soon the industry will come to a standstill in the near future. This has been a severe blow to building supply merchants whose sales are reported to be as much as two thirds below normal. It should be noted that what Bahamians would consider "normal" would seem to others a period of substantial growth. The construction industry is particularly vulnerable to changing fortunes, but

in the Bahamas it has until now seen only continuous growth for more than a decade.

Nassau has become an international financial center. The absence of income tax, capital gains tax and succession duties has attracted a great deal of foreign money. A large number of banks and trust companies have sprung up to handle the inflow. Lately, however, this inflow has slowed to a trickle, or even reversed. Money is purportedly flowing back into the North American stock markets following the recovery in American stock prices. Besides this, other tax havens such as the British Virgin

Islands, Cayman Islands, and even Jamaica are now attracting capital that once went to Nassau. Nassau-based banks and trust companies are following the flow and setting up branches in these centers.

There may be another ground for investor disenchantment with the Bahamas—the recent dispute over the Hawkeshill Creek Agreement. This agreement, essentially a contract between the Bahamas Government and the licenced businesses of Freeport, is the very basis of Freeport's existence. It was signed in 1955 and granted to the Grand Bahama Port Authority, a private company, Crown land eventually totalling about 233 square miles. The Government also granted three concessions to the Port Authority and its licensees: freedom from taxation; freedom from customs duties; freedom from immigration restrictions. In return, the corporation undertook to build a deep-water port, provide medical and educational facilities, living quarters for government employees, and to share in the cost of government services such as the administration of justice, postal service, immigration control, and the collection of duties.

A disagreement arose between the licensees and the Government over work permits. The result hurt investor confidence. Where Freeport, the Bahamas' most modern city now stands, there was nothing but pine-covered scrubland a mere 16 years ago. Since 1955, more than \$800 million has been poured into the development of a port, waterways, housing, hotels and casinos. It is doubtful that any other city in the world has sprung up so quickly, or could have avoided the slump which Freeport is now experiencing.

Other indications of economic downturn are provided by the increasing rate of business failures, and the tightening of credit.

The level of manufacturing activity continues to increase. A large refinery representing an investment of \$80 million recently began producing low sulphur fuel oil. A pharmaceutical plant now exports hormones to the value of roughly \$2 million each year and, of course, the rum production continues to expand.

Accompanying tables give an indication of the size and composition of the Bahamas' external trade.

MAIN BAHAMIAN PURCHASES, 1970

Commodity	\$ million
Non-electric machinery	34.4
Miscellaneous manufactured articles	32.7
Transport equipment	23.2
Electrical machinery and appliances	20.8
Petroleum and petroleum products	17.2
Meat and meat preparations	16.9
Metal manufactures n.e.s.	14.6
Clothing	9.8
Non-metallic mineral manufactures	9.3
Perfumery, toilet preparations	7.7
Furniture	7.5
Fruit and vegetables	7.2
Iron and steel	6.6
Miscellaneous preparations	6.5
Bullion and specie	6.4
Yarn, fabrics	5.9
Paper, paperboard manufactures	5.8
Medicinal, pharmaceutical products	4.9
Cereal and cereal preparations	4.8
Plumbing, heating/lighting fixtures	4.5
Others	96.9

Source: Department of Statistics, Nassau

Imports from Canada have been \$15.2 million in 1969, \$16.5 million in 1970, and should do nearly as well in 1971. Canadian exporters of fish, meat and dairy products have always found a receptive Bahamian market, as have manufacturers of garments, machinery, and automotive parts and accessories.

There are generous incentives to industries establishing in the Bahamas, and it is nearly certain that the industries which have recently been attracted will be followed by others. A campaign to make foreign businesses aware of the benefits to be derived from establishing in Freeport seems to have had much success. Besides stressing the obvious tax advantages accruing to both business and key personnel coming in, the brochures point to political stability, a first-class infrastructure with excellent power and water supplies, good transportation facilities and outstanding climate and recreational amenities.

The Bahamas seems ready to take more advantage of its geographic

CANADA'S TRADE WITH THE BAHAMAS, 1970

Commodity	\$
Principal Exports	
Evaporated milk	1,244,827
Clothing	889,167
Aircraft	816,256
Sugar	699,275
Aircraft engines and parts	563,453
Wheat flour	526,497
Automobiles	502,951
Whisky	449,123
Sausage	457,895
Glass container and parts	390,140
Jewellery	375,913
Aircraft assemblies, equipment and parts	371,091
Telephone apparatus equipment and parts	347,914
Printed matter	281,324
Medicinal and pharmaceutical products	276,764
Insulated wire and cable	263,400
Soups	262,096
Tires	252,956
Potato products, frozen	240,211
Non-alcoholic beverages	221,264
Contractors' equipment and tools	212,599
Cigarettes	204,582
Principal Imports	
Fuel oil	3,198,599
Sex hormones	1,542,353
Rum	1,152,535
Paintings and pastels	106,373
Fresh cucumbers	88,819
Perfumes, toilet waters and colognes	48,132
Others	320,302

Source: Statistics Canada

location. As well as being within easy reach of American tourists, the Bahamas is geographically well situated as a distribution center for air freight moving to Europe from Central American, Southeastern United States and Caribbean centers. A non-conference air-freight service between Freeport and European points offers attractive rates to exporters wishing to consolidate shipments by making use of Freeport's growing transshipment facilities. Canadian exporters should not overlook the possible advantages of shipping in bulk to Freeport and then breaking down shipments or



even repackaging there for onward shipment to customers in the Caribbean.

Certainly land buyers appear to believe in the Bahamas. Despite an economic slump, land sales continue to increase and in Freeport alone amounted to more than \$45 million in 1970. Other major developments are about to begin in several of the

Out Islands. The size of these land development schemes leaves no doubt that the current business slowdown can be only temporary. The Bahamian economy has grown accustomed to rates of growth that would be considered phenomenal anywhere else and an occasional purging of weaker elements may contribute to long-term health and stability. The condition

of the Bahamian economy tends to follow the trend set by the United States economy, but with magnified effect. Now that there are hopeful signs in the United States, it can be only a short while until the pendulum swings back towards good times again here.



...British Honduras

ARMAND BLUM, Commercial Secretary, Kingston

The most important economic development that took place in Belize (British Honduras) during 1971 was its decision to apply for membership in the Caribbean Free Trade Association (CARIFTA) and its acceptance by the members of that Association. By this move, British Honduras has now thrown its lot in with the Caribbean, though not renouncing its role as a Central American country. It expects, in time, to become one of CARIFTA's agricultural providers, particularly for meat, grains and vegetables.

So far the development of the country has been hampered by its small population (about 123,000 people for 8,866 square miles, or 14 people to the square mile) and a lack of development capital. It has not yet attained full independence and has had to depend mainly on British aid to help its development. Lately, Canada has also begun to help and has committed some \$2 million in development funds.

Total exports in 1970 increased by 10.7 per cent over 1969, to a level of \$14.6 million. Main exports were sugar and molasses (\$7.4 million), citrus (\$2.5 million), fish and shellfish (\$1.6 million), logs and lumber (\$1.1 million) and clothing (\$884 thousand).

There is a market here for Canadian exporters. Total imports in 1970 increased by 15.9 per cent over 1969 to \$35.9 million, of which food products accounted for the largest share (22.6 per cent) at \$8.1 million. Main suppliers in 1969 were the United States (34.0 per cent) Britain



Some of the best mahogany in the world can be found in the forests of British Honduras. Here two axmen trim a mahogany tree before it is loaded onto a truck. In the background on the left is the crawler tractor that will haul the log away.

(25.3 per cent), Canada (7.9 per cent) and Jamaica (3.4 per cent). Belize's immediate neighbors, Costa Rica, El Salvador, Guatemala, Honduras and Nicaragua (the Central American Common Market), supplied only small amounts of the total imports.

Total Canadian trade with Belize increased by 11.4 per cent in 1970 over 1969 levels, reflecting an increase of \$500,000 in Canada's imports of \$3 million. Our exports to Belize actually decreased fractionally to \$1.7 million.

MAIN CANADIAN PURCHASES FROM . . .

	\$'000	
	1969	1970
Raw sugar	1,933.6	2,275.7
Orange juice, not concentrated	274.4	324.0
Fruit juice concentrates, frozen, n.e.s	nil	188.1
Fruits and berries, dried, n.e.s.	28.2	72.6
Cucumbers, fresh	80.9	50.8
Bananas and plantains, fresh	53.3	44.6
Other	155.3	75.4
Total	2,525.7	3,031.2

. . . AND SALES TO BRITISH HONDURAS

Newsprint paper	262.0	312.4
Wheat flour, n.e.s.	115.8	123.4
Broad woven fabrics, cotton, n.e.s.	44.1	87.3
Files and rasps	74.6	81.5
Truck and bus tires, pneumatic	31.2	62.9
Aircraft, complete with engines	nil	60.5
Paper bags and multiwall sacks	42.6	43.1
Switchgear and protective equipment and parts, n.e.s.	nil	42.2
Broad woven fabrics, mixed fibers	14.3	41.2
Sardine, canned	56.1	41.1
Other	1,079.5	804.9
Total	1,720.2	1,700.5

The development of the economy is being concentrated in the agricultural and tourist sectors, where the country possesses some comparative advantages over Caribbean neighbors. It is expected that considerable investments will have to be made in infrastructure, particularly communications, to support this development. The question as to where these investments will come from has not been answered.

At any rate, there are already good opportunities for Canadian exporters of consumer products and construction and transport equipment, which can be competitive on a c.i.f. Belize City basis. There is so far little industrial development here, and therefore few import restrictions.

British Honduras in Brief

Area: 8,866 square miles

Population: 122,000 (1969 estimate)

Climate: humid sub-tropical with coastal temperatures ranging from 50°F to 96°F. The dry season extends from February to May; the average annual rainfall ranges from 50" in the North to 175" in the south, concentrated mainly in the period from May to August.

Language: English. Spanish also spoken by part of the population but English is the common business language.

Currency: Belize dollar; B\$1.00 = Cdn.\$0.6078.

Exchange control: normal sterling area exchange controls; however, foreign currency is readily issued to bona fide importers.

Weights and measures: Imperial standards, but gas and kerosene sold by the U.S. gallon.

Electric supply: 3 phase 60 cycles, 110/220 volts, two or three wire single phase and 220/440 volts, four wire, 3 phase 60 cycles.

Capital: Belmopan (the seat of Government was moved from Belize City in mid 1970).

Chief ports: Belize City, Corozal, Stann Creek.

Marketing center: Belize City, population 47,000 (estimated).

Economy: based mainly on agriculture (sugar, citrus, vegetables), fishing (lobster, shrimp, conch) and lumber. The greater part of industry is concerned with processing these products.

Total Belize imports: 1967—Cdn. \$22.5 million; 1968—Cdn. \$26.9 million.

Chief imports: manufactured goods, food machinery, transport equipment, chemicals and mineral fuels.

Chief suppliers: United States, Britain, Jamaica, Netherlands and Canada.

Total Belize exports: 1967—Cdn. \$12.4 million; 1968—Cdn. \$15.3 million.

Chief exports: sugar, citrus fruit and fruit juices, mahogany, fish.

Chief markets: Britain, United States, Mexico and Canada.

Prices: quote Cdn. or U.S. dollars c.i.f. Belize City.

Samples: the amount of duty payable on samples is deposited with the Collector of Customs to be refunded, provided the goods are taken out of the country within six months.

Usual terms of payment: irrevocable letter of credit for new accounts; terms varying between 30 days and 120 days for established customers.

Preferential tariff: Belize is a member of the British Commonwealth. Most duties range from 15 to 30 per cent ad valorem under the general tariff and from 10 to 20 per cent under the preferential tariff.

Visas: not required.

Inoculations: smallpox.

Correspondence: airmail only: letters 15 cents per half ounce.

Documentation, customs tariffs, marking and labelling: consult the Office of Area Relations, Department of Industry, Trade and Commerce, Ottawa.

For detailed information on this market write to: Office of Area Relations, Western Hemisphere Affairs Branch, Department of Industry, Trade and Commerce, Ottawa, or Commercial Secretary, Canadian High Commission, P.O. Box 1500, Kingston 10, Jamaica.

Furthermore, Canadian exporters benefit from a Commonwealth preference that applies on most goods and averages about 10 per cent.

If you are interested in exploring this potentially attractive market, write

for further information to the Commercial Secretary, Canadian High Commission, P.O. Box 1500, Kingston 10, Jamaica.

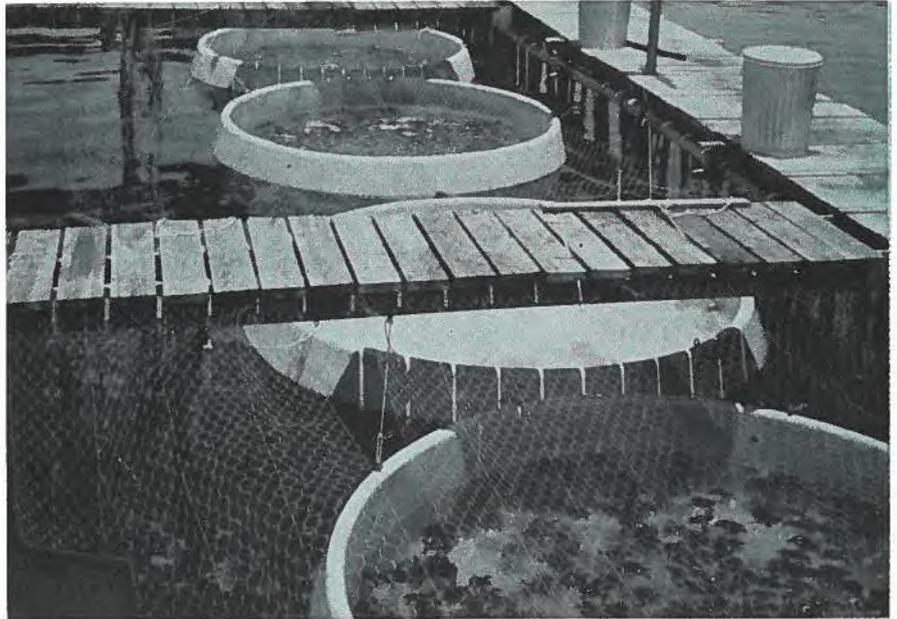


...Cayman Islands

ARMAND BLUM, Commercial Secretary, Kingston

The Cayman Islands are situated some 180 miles north west of Jamaica and 450 miles south of Florida in the Western Caribbean. Grand Cayman, the main island (with George Town, the capital) is nearly 90 miles from the lesser islands of Cayman Brac and Little Cayman. The islands were sighted by Columbus in 1503, during his fourth and last West Indian voyage. He named them Las Tortugas (The Turtles) and they later became famous as a revictualling station for ships because of the large numbers of green turtles found near them. Wild turtles are almost extinct now, but a new industry of turtle farming was started recently on Grand Cayman.

In 1962 when the Federation of the West Indies disintegrated the Cayman Islands broke away from its long political association with Jamaica to become a British Crown Colony, and a new constitution was introduced giving a British-appointed Administrator



The Caymans got their first European name from the abundance of green turtles. Over the centuries, however, hungry seamen almost ate them out of existence and turtle farms are now one of the newer local industries. The top photo shows the hatching tanks covered by wire netting, presumably to keep any predatory bird from snatching a free meal. When maturer, the turtles provide delicacies for the gourmet and pets for others. Obviously the dog has nothing but good-natured scorn for the latter role. It's a good thing they're not snappers.

IMPORTS INTO THE CAYMAN ISLANDS 1967	
	Cdn. \$'000*
Food	872.2
Drink	271.8
Tobacco	48.2
Raw materials and semi-manufactures	239.7
Chemicals	172.0
Manufactures	
consumer	1,066.4
capital	611.0
Petrol/diesel/oil	270.5
Miscellaneous and sundries	180.0
Mail parcels	113.7
Duty exempt imports	
government	59.3
hotels	181.0
pioneer industries	133.0
Caribbean utilities (power company)	44.7
other	16.5
Total	4,280.0

*On the basis of J\$1.00 = C\$1.25



the powers and responsibilities formerly exercised by the Governor of Jamaica. Since then Cayman has developed on the twin bases of tourism and tax haven industries.

Although the islands represent a rather small market in terms of population—about 14,000—they are on a per capita basis the richest market in the Caribbean: current general labor rates are \$12.50 to \$15 a day. The lack of natural resources and the need to import practically all requirements for the population and the tourists made the Caymans a \$9.7 million market in 1970. The rate of growth of the economy has been remarkable over the past ten years, the result of the pros-

perous and rapidly increasing tourist and international finance (tax haven) industries. Imports more than doubled in three years from the 1967 total of \$4.2 million. The table shows the latest available breakdown by product.

Cayman is very close to Florida and interested Canadian exporters will have to compete against this traditional and well-established source of supply. There are few Commonwealth preference rates in the Caymans' customs tariff (butter, tea, alcoholic beverages, tobacco products, cement and galvanized corrugated iron sheets are the main preferential items), but importers are willing to look at Canadian products if they are competitive in terms of

price. Shipping services to the islands are mainly through Miami or Tampa, Florida, and quotations should be c.i.f. these ports.

The best prospects for Canadian exporters are food and other supermarket products (especially if the whole range of supermarket needs can be offered by the same exporter), building materials, and hotel or condominium equipment and furnishings. For further information and details and names of possible contacts in the islands write to the Commercial Division, Canadian High Commission, P.O. Box 1500, Kingston 10, Jamaica.



...Turks and Caicos Islands

W. D. HUTTON, Assistant Commercial Secretary, Kingston

The Turks and Caicos Islands offer the tourist, the developer, the investor and the exporter the opportunity to involve themselves in the Caribbean of 15 years ago. Late-comers to the Caribbean growth curve of tourist and economic development, this Crown Colony has been supported by the British Government with grants-in-aid since the collapse of the salt industry in 1960. In 1970, aid amounted to \$1.4 million, supplementing local revenue of only \$635,000 obtained primarily from customs duties. To reverse this financial dependence, Britain has commissioned a number of studies and reports, the latest being the Shankland Cox Report which is expected to be published soon. An interim report agrees with the earlier Jakeway Report conclusion that development of the islands must be based on tourism: there is no alternative economic base, other than the fisheries potential.

Geographically, the Turks and Caicos Islands are a continuation of the Bahamas chain, which they resemble closely. Low-lying and arid but ringed with long white sandy beaches, reefs and lagoons, they are situated some 100 miles north of Hispaniola in the middle of the popular Miami-Puerto Rico private aircraft corridor and are frequently used as a refuelling and rest stop. Politically,

they are a Crown Colony of Britain which appoints an Administrator who is responsible for day-to-day administration and is also President of a locally-elected State Council. Fundamental laws and decisions, however, require approval of the British Government. Cockburn Town on Grand Turk is the administrative center.

The population, estimated at 6,000, is unevenly distributed throughout the islands. An equal number of islanders have emigrated to other countries, primarily the Bahamas, seeking employment. These expatriates are expected to provide a trained labor force for any future tourist development. The main population centers are on Grand Turk and South Caicos, with scattered settlements on North Caicos, Grand Caicos, Providenciales and Salt Cay. Providenciales is now the most developed from a tourism point of view.

Historically, the basic industry on the islands has been salt raking from salinas which were built for solar production by Bermudians. As mentioned, this industry disappeared in 1960, with the exception of one heavily-subsidized operation on Salt Cay. The rocky islands support only minimal farming. Seafood is the only foodstuff that can be produced in any quantity. The surrounding waters abound in lobster, conch and scale-

fish, partly because of a plentiful supply of basic fishfood and partly because there has been little commercial fishing. Today there are a number of plants processing crawfish brought in by the growing fleet of commercial vessels. Crawfish are almost the islands' only export earner. This industry offers opportunities for Canadian firms that build boats similar to Boston whalers, or larger ones in the 40-foot range with saltwater ice machines. Lobster are snared by free divers in up to 30 feet of water. Exports of scale fish and conch are small but the potential is good.

What will these islands bring to a possibly already crowded tourist market? First, the climate is excellent, sunnier than the northern islands of the Bahamas and drier than the southern islands. The trade winds blow almost continuously, making sleep without air conditioning possible and enjoyable. The beaches are long and gentle with a present density, conservatively estimated, at one swimmer per five miles. The opportunities for diving are equal to those in any tropical environment in the world. Many of the coral reefs are unexplored and visibility is limited only by the penetration of sunlight. Sport fishing for bonefish, tarpons, permit, ladyfish and barracuda is virtually untouched.



Development is getting under way. Roads have been cut on North Caicos, Pine Cay and Providenciales, opening up the land for housing developments and hotels. All the islands now have airstrips and those on South Caicos and Grand Turk are paved. There is a 40-bed hotel, the Admirals Arms, on South Caicos, a 10-bed guest house, the Turks Head Inn, on Grand Turk and a small luxury hotel, the Third Turtle, on Providenciales. A number of houses have already been built on Providenciales and a general merchandise store, a complete machine shop, and a marina are almost finished. Provident Ltd., the largest developer, is launching its advertising campaign later this year.

Air Caicos has three flights a week between Nassau, Grand Turk and South Caicos and twice daily flights on an inter-island basis. By the

end of this year, Cable and Wireless will offer telephone, telex and telegram service among the islands and all over the world. Water is scarce but supplies are being augmented by reverse osmosis plants, desalination plants and catchment basins, including runways. There are no land, property or income taxes. Customs duties average about 20 per cent for goods imported from the Commonwealth and about 25 per cent for other countries. Duties are levied on the ex factory price, and quotations should therefore be f.o.b. factory plus freight charges to Miami. Land, most of which is held by the Crown except on Grand Turk and South Caicos, is still available for development.

What are the opportunities for Canadian exporters? Basically, the main market would seem to be for construction materials, but as no goods

are either grown or produced locally there is some demand for almost everything in the way of consumer goods. A market of 5,000 people may seem small, and untied government revenue is small, but trade relationships could well be initiated now in anticipation of development. Total imports in 1969 amounted to \$1,080,000 and consisted of food, beverages and tobacco, manufactured articles, fuel and lubricants and construction materials. Main suppliers were Britain 19 per cent, other Commonwealth 20 per cent, and non-Commonwealth 61 per cent.

If you are interested in this market and want to get a head start, write for further details to the Commercial Secretary, Canadian High Commission, P.O. Box 1500, Kingston 10, Jamaica.



Export Opportunities

The inquiries listed below come from several sources, including various Branches of the Department in Ottawa and the Trade Commissioner Service posts abroad. Exporters should correspond directly with the companies or agencies mentioned, using the addresses given, and should send copies of the correspondence to the Trade Commissioner for follow-up. The Department of Industry, Trade and Commerce cannot assume any responsibility for trade negotiations that exporters may enter into with these firms, nor can it vouch for their commercial standing.

Agricultural products

BRAZIL—Dr. Igor F. von Hertwig, manager, NITROSIN S/A-Industria e Comercio de Productos Quimicos, Caixa Postal 30279, São Paulo, is interested in the exclusive distribution in Brazil of insecticides (phosphorated and carbonated), fungicides (organic), herbicides, forage seeds (hybrid sorghum, ray grass, clover and others).

Alloyed steel

FINLAND—Oy Telko Ab, Aleksanterinkatu 13, Helsinki 10 (attention P. Hoppo-

nen, manager, Special Metals Division), would like to locate Canadian sources of alloyed steel, particularly chrome, nickel and molybdenum alloyed.

Pumps

SWEDEN—AB Record-Material, Lundagatan 3, S-171 63 Solna (attention Olof Wikner, president), would like to locate Canadian suppliers of metering pumps and pumps for corrosive fluids.

Reconditioned harbor equipment

SPAIN—J. M. Sala, IMACEX, Calabria, 290, Barcelona, is looking for suppliers of used or reconditioned port and harbor equipment, such as dredgers and heavy construction plant.

The following inquiries for Canadian suppliers have been received from Belize City, British Honduras:

Building supplies—Santiago Castillo, president of Santiago Castillo Ltd., P.O. Box 69, wants barbed wire, roofing nails, crown corks, caustic soda, aluminum sulphate.

Food, shoes—Frank Kuylen, manager, James Brodie and Co. Ltd., P.O. Box 365, wants milk powder in tins of 1, 2.5, 5 and 10 lb.; frozen butter in $\frac{1}{2}$ and 1 lb. packs; good quality men's shoes.

Hand tools—Arthur Taylor, sales manager, Hofius Ltd., P.O. Box 226, wants hand tools of all descriptions.

Hospital supplies—L. Isaacs, chief pharmacist, Belize City Hospital, wants pharmaceuticals, X-ray film, intravenous solutions in plastic bags.

Newsprint—Ismael Gomez, Ismael Gomez Co. Ltd., 15 Mosul St., wants newsprint in sheets for local tabloids.

Shingle machinery—Henry Flowers, acting chief forestry officer, Ministry of Trade and Industry, Belmopan, British Honduras, wants machinery for producing shingles.

Steel—F. J. Castellanos, manager, Belize Steel Co., Haulover Road, wants welding equipment, rods, steel ingots 2.5 x 2.5 inches in any length for rolling reinforcing rods.

Geographical Listing for Exporters

Need information on foreign markets? You can get it from the Trade Commissioner posts around the world, or from the Office of Area Relations in Ottawa. This breakdown tells you which TC post and which OAR Division is responsible for the country in which you are interested.

Country	TC Post	OAR Division	Country	TC Post	OAR Division
Afar and Issas, Territory of the (Fr. Somaliland)	Nairobi	Africa	Brunei	Kuala Lumpur	Asia
Afghanistan	Islamabad	Asia	Bulgaria	Vienna	Eastern Europe
Albania	Vienna	Eastern Europe	Burma	Kuala Lumpur	Asia
Algeria	Algiers	Africa	Burundi	Kinshasa	Africa
Andorra	Paris	Western Europe	Cambodia	Hong Kong	Asia
Angola	Johannesburg	Africa	Cameroon	Kinshasa	Africa
Arab Republic of Egypt	Cairo	Africa	Canal Zone	San José	Latin America
Argentina	Buenos Aires	Latin America	Canary Islands	Madrid	Western Europe
Aruba (see Netherlands Antilles)			Cape Verde Islands	Lisbon	Western Europe
Australia	Sydney Melbourne Canberra	Pacific	Cayman Islands	Kingston	Caribbean
Austria	Vienna	Western Europe	Central African Republic	Kinshasa	Africa
Azores	Lisbon	Western Europe	Ceylon	Colombo	Asia
Bahamas	Kingston	Caribbean	Chad	Kinshasa	Africa
Bahrein	Beirut	Asia	Chile	Santiago	Latin America
Balearic Islands	Madrid	Western Europe	China, People's Republic of	Peking	China Task Force
Barbados	Port-of-Spain	Caribbean	Christmas Island	Sydney	Pacific
Belgium	Brussels	Western Europe	Cocos-Keeling Islands	Sydney	Pacific
Bermuda	New York	Caribbean	Colombia	Bogota	Latin America
Bhutan	New Delhi	Asia	Comoro Islands	Johannesburg	Africa
Bolivia	Lima	Latin America	Congo (Brazzaville)	Kinshasa	Africa
Bonaire (see Netherlands Antilles)			Congo (Kinshasa) (see Zaire)		
Botswana	Johannesburg	Africa	Cook Islands	Wellington	Pacific
Brazil	Rio de Janeiro Sao Paulo	Latin America	Costa Rica	San José	Latin America
Britain	London Glasgow	Britain	Cuba	Havana	Caribbean
British Honduras	Kingston	Caribbean	Curacao	(see Netherlands Antilles)	
British Solomon Islands	Sydney	Pacific	Cyprus	Tel Aviv	Western Europe
			Czechoslovakia	Prague	Eastern Europe

Country	TC Post	OAR Division	Country	TC Post	OAR Division
Dahomey	Lagos	Africa	Ivory Coast, Republic of	Abidjan	Africa
Denmark	Copenhagen	Western Europe	Jamaica	Kingston	Caribbean
Dominican Republic	San Juan	Caribbean	Japan	Tokyo	Pacific
Ecuador	Bogota	Latin America	Jordan	Beirut	Asia
Egypt (see Arab Republic of Egypt)			Kenya	Nairobi	Africa
El Salvador	Guatemala City	Latin America	Korea	Tokyo	Asia
Equatorial Guinea	Madrid	Africa	Kuwait	Beirut	Asia
Ethiopia	Nairobi	Africa	Laos	Bangkok	Asia
Falkland Islands	Buenos Aires	Caribbean	Lebanon	Beirut	Asia
Fiji	Sydney	Pacific	Leeward Islands	Port-of-Spain	Caribbean
Finland	Stockholm	Western Europe	Lesotho	Johannesburg	Africa
France	Paris	Western Europe	Liberia	Abidjan	Africa
French Guiana	Port-of-Spain	Western Europe	Libya	Cairo	Africa
French Oceania	Wellington	Pacific	Liechtenstein	Berne	Western Europe
French Somaliland (see Afar and Issas)			Luxembourg	Brussels	Western Europe
Gabon	Kinshasa	Africa	Macao	Hong Kong	Asia
Gambia	Lagos	Africa	Madeira	Lisbon	Western Europe
Germany	Bonn Duesseldorf Hamburg	Western Europe	Malagasy Republic	Johannesburg	Africa
Ghana	Lagos	Africa	Malawi	Nairobi	Africa
Gibraltar	London	Britain	Malaysia	Kuala Lumpur	Asia
Gilbert and Ellice Islands	Wellington	Pacific	Mali, Republic of	Abidjan	Africa
Greece	Athens	Western Europe	Malta	Rome	Western Europe
Greenland	Copenhagen	Western Europe	Martinique	Port-of-Spain	Western Europe
Guadeloupe	Port-of-Spain	Western Europe	Mauritania, Republic of	Abidjan	Africa
Guatemala	Guatemala City	Latin America	Mauritius	Johannesburg	Africa
Guinea, Republic of	Abidjan	Africa	Mexico	Mexico City	Latin America
Guyana	Port-of-Spain	Caribbean	Monaco	Paris	Western Europe
Haiti	San Juan	Caribbean	Morocco	Madrid	Africa
Honduras	Guatemala City	Latin America	Mozambique	Johannesburg	Africa
Hong Kong	Hong Kong	Asia	Muscat and Oman	Beirut	Asia
Hungary	Vienna	Eastern Europe	Nepal	New Delhi	Asia
Iceland	Oslo	Western Europe	Netherlands	The Hague	Western Europe
India	New Delhi	Asia	Netherlands Antilles	Caracas	Caribbean
Indonesia	Djakarta	Pacific	New Caledonia	Sydney	Pacific
Iran	Tehran	Asia	New Hebrides (British-French Condominium)	Sydney	Pacific
Iraq	Beirut	Asia	New Zealand	Wellington	Pacific
Ireland, Republic of	Dublin	Britain	Nicaragua	San José	Latin America
Israel	Tel Aviv	Western Europe	Niger, Republic of	Abidjan	Africa
Italy	Rome Milan	Western Europe	Nigeria	Lagos	Africa

Country	TC Post	OAR Division	Country	TC Post	OAR Division
Northern Ireland	Glasgow	Britain	Tahiti	Wellington	Pacific
Norway	Oslo	Western Europe	Tanzania	Nairobi	Africa
Okinawa (see Ryukyu Islands)			Thailand	Bangkok	Asia
Pakistan	Islamabad	Asia	Togo	Lagos	Africa
Panama	San José	Latin America	Tonga	Wellington	Pacific
Papua and New Guinea	Sydney	Pacific	Trinidad and Tobago	Port-of-Spain	Caribbean
Paraguay	Buenos Aires	Latin America	Tunisia	Algiers	Africa
Persian Gulf Area	Beirut	Asia	Turkey	Ankara	Asia
Peru	Lima	Latin America	Turks and Caicos Islands	Kingston	Caribbean
Philippines	Manila	Pacific	Uganda	Nairobi	Africa
Poland	Warsaw	Eastern Europe	Union of Arab Emirates	Beirut	Asia
Portugal	Lisbon	Western Europe	United Arab (see Arab Republic of Egypt) Republic		
Portuguese Guinea	Lisbon	Africa	United Kingdom	(see Britain)	
Puerto Rico	San Juan	United States	United States	Washington Boston Buffalo Chicago Cleveland Dallas Detroit Los Angeles Minneapolis New Orleans New York Philadelphia San Francisco Seattle United Nations (New York)	United States
Qatar	Beirut	Asia			
Reunion	Johannesburg	Africa			
Rhodesia	—	Africa			
Romania	Vienna	Eastern Europe			
Rwanda	Kinshasa	Africa			
Ryukyu Islands	Tokyo	Pacific			
St. Helena	Cape Town	Africa			
St. Pierre and Miquelon	Boston	Western Europe			
São Tomé and Príncipe	Lisbon	Africa			
Saudi Arabia	Beirut	Asia	Upper Volta, Republic of	Abidjan	Africa
Scotland	Glasgow	Britain	U.S.S.R.	Moscow	Eastern Europe
Senegal, Republic of	Abidjan	Africa	Uruguay	Buenos Aires	Latin America
Seychelles Islands	Nairobi	Africa	Venezuela	Caracas	Latin America
Sierra Leone	Lagos	Africa	Vietnam	Hong Kong	Asia
Sikkim	New Delhi	Asia	Virgin Islands (Br.)	San Juan	Caribbean
Singapore	Singapore	Asia	Virgin Islands (U.S.)	San Juan	United States
Somali Republic	Nairobi	Africa	Western Samoa	Wellington	Pacific
South Africa, Republic of	Johannesburg Cape Town	Africa	Windward Islands	Port-of-Spain	Caribbean
Spain	Madrid	Western Europe	Yemen Arab Republic	Beirut	Asia
Spanish Sahara	Madrid	Africa	Southern Yemen, People's Republic of	Beirut	Asia
Sudan	Cairo	Africa	Yugoslavia	Belgrade	Eastern Europe
Surinam	Port-of-Spain	Caribbean	Zambia	Nairobi	Africa
Swaziland (Ngwane)	Johannesburg	Africa	Zaire, Republic of, formerly Congo (Kinshasa)	Kinshasa	Africa
Sweden	Stockholm	Western Europe			
Switzerland	Berne	Western Europe			
Syria	Beirut	Asia			

Foreign Commercial Representatives in Canada

ARGENTINA

Economic Counsellor's Office
Embassy of Argentina
56 Sparks St., Room 307
Ottawa K1P 5A9
Phone: 236-9431

AUSTRALIA

Commercial Counsellor and Australian
Government Trade Commissioner
Australian High Commission
90 Sparks St.
Ottawa K1P 5B4
Phone: 236-2684
Telex: 013-3391

Australian Government Trade Commissioner
Canadian Imperial Bank of Commerce Bldg.
1155 Dorchester Blvd. W., Suite 811
Montreal 102
Phone: 875-2000
Telex: 01-26583

Australian Government Trade Commissioner
Guinness Tower, Suite 500
1055 West Hastings St.
Vancouver
Phone: 684-1177
Telex: 04-507580

AUSTRIA

Austrian Embassy
445 Wilbrod St.
Ottawa K1N 6M7
Phone: 235-5521
Telex: 013-3290

Austrian Consulate
1132 Kensington Rd. N.W.
Calgary
Phone: 283-6526

Austrian Consulate
526 Young Ave.
Halifax
Phone: 423-7593

Austrian Trade Delegate
630 Dorchester Blvd. W.,
Montreal 101
Phone: 866-1103

Austrian Trade Delegate
401 Bay St., Suite 2008
Toronto 103
Phone: 363-3677

Austrian Trade Delegate
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736 Granville St.
Vancouver 2
Phone: 683-5808

Austrian Consulate
54 Harrow St.
Winnipeg 9
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BELGIUM

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Consul General of Belgium
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BOLIVIA

Consul General
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BRAZIL

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The British Trade Commissioner for
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The Senior British Trade Commissioner
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Montreal 101
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The British Trade Commissioner
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Regina
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The Senior British Trade Commissioner
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The Principal British Trade Commissioner
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Bulgarian Trade Commission
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BURMA

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709 South Borough Drive
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CHINA, People's Republic of

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1500 Stanley St., Suite 320
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CONGO (Kinshasa)
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CUBA

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Montreal 109
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Telex: 01-20315

Royal Danish Consulate
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Toronto 181
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Royal Danish Consulate
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DOMINICAN REPUBLIC

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EASTERN CARIBBEAN COMMISSION (Leeward and Windward Islands)

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82 Heathcote Ave.
Willowdale 430 (Toronto)
Phone: 489-0910

Honorary Consul of Ecuador
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FINLAND

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Toronto
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Trade Commissioner for Mexico
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MONACO

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Netherlands Consulate General
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Royal Norwegian Consulate General
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Honorary Consul of Peru
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139 Granville St.
Vancouver 3
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Honorary Consulate of Portugal
King's Bridge Court, Apt. 2D
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SPAIN

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SWEDEN

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UNION OF SOVIET SOCIALIST REPUBLICS

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Port-of-Spain Reports...

Investing in the Eastern Caribbean

Obvious need for resource development and employment opportunities has led countries of the Eastern Caribbean to offer various incentives to foreign investors, while retaining some local equity and control. The incentives and opportunities are outlined in the following article.

G. H. MUSGROVE
Commercial Secretary, Port-of-Spain

"... we need injection of capital at a level which is not available within the region. But here we walk a very tight rope to hold the balance between, on the one hand, rapid economic development which alone can produce the desirable level of employment, and on the other hand, to ensure that political gains are not sacrificed by the loss of economic control."

—John Compton, Premier of St. Lucia.

The Eastern Caribbean is perhaps best known to the average Canadian for its vacation possibilities and as an area where he possibly envisages industry as consisting solely of people collecting tropical fruits to a background of calypso music.

Although tourism and tropical agriculture are significant and will continue to be significant in developing local economies, the 1970's will see a far greater emphasis on the further development of resource extraction and secondary manufacturing than at any time in the past. The 15 governments of this region are committed to creating gainful employment for their growing population of three million whose present per capita incomes range from approximately \$250 to \$700.

New jobs are needed for both the unemployed (more than 15 per cent of the work force) and for the underemployed (in subsistence agriculture) and to absorb those who may be displaced from agriculture by



Showing a slight shyness, a Trinidadian girl demonstrates the technique of packaging locally made electric light bulbs for the benefit of the Hon. Errol Mahabir, Trinidad's Minister of Labour, Social Security and Co-operatives.

mechanization. This priority for development has to some extent coincided with an upsurge of economic nationalism which has created for most area governments a dilemma. How are they to encourage foreign capital and expertise, yet attempt to regulate these so that both the real and apparent best interests of their countries are served? These two objectives are not necessarily mutually exclusive, but neither are they completely complementary. Some slowdown in foreign investment has in fact been evident in recent years, particularly on the part of firms or financial interests which feel that firm management control is essential to their operations.

It is apparent that governments in this area are not anxious to see completely foreign-owned companies continuing to enter and dominate their economies. They would prefer, where they cannot go it alone, to have a partnership of foreign and local economic decision-making. Canadian businessmen will find plenty of opportunities within this formula to sell equipment, technology or management skills, or to combine these inputs with profitable capital investment.

There are many opportunities for Canadians to invest in and/or sell equipment and technology to countries in the Eastern Caribbean. For those with manufacturing intentions, the es-



establishment of a plant in this area offers the lure of government-sponsored industrial incentives, the prospect of modest wage rates, market penetration and/or market maintenance for end products, the opportunity to spread the costs of research and development through sale of technology, management techniques and perhaps specialized machinery—which may, in some instances, create a continuing market for raw materials or other input into the area. An industrial establishment in an Eastern Caribbean country may also have tariff advantages in servicing the larger area of CARIFTA.

On the other hand, foreign investment must offer benefits to Caribbean governments themselves; these include more employment opportunities, an input of scarce capital, acquisition of technology, management and production expertise, and access to marketing and distribution channels in the short term. In the longer term, advantages include increasing the tax base of the economy, the creating and upgrading of local labor and management skills, import replacement, and export earnings to improve trade accounts, as well as providing fertile ground for satellite industries through industrial linkages.

In recognition of these benefits of foreign investment, most governments in the area are committed to attracting investment capital through industrial incentives. Examples of these incentives, which vary not only from state to state but also with the type of investment, may include the following:

1. Income tax holiday (five years or longer)
2. Exemption from import duties on plant and equipment, raw materials and supplies
3. Accelerated depreciation allowances
4. Unlimited repatriation of profits
5. Setting off losses against future profits
6. Preferred access to industrial sites and possibly buildings
7. Protection against imports
8. Other concessions, applicable on a case-by-case basis.

In return for these incentives, most area governments require the foreign investor to demonstrate good corporate citizenship and to provide, either at the outset or in an agreed time, opportunities for significant local ownership in major undertakings, either through government or private capital. The foreign firm is also encouraged to employ nationals to the largest extent possible and, where this is impossible, to train local stand-ins for the expatriate employees. Foreign investors may also be expected to use local inputs, whenever practical, and to save and/or earn foreign exchange where possible. Needless to say, the incentives offered and the obligations to be assumed are subject to negotiation and vary considerably from one case to the next.

Investment Opportunities and Policies

Trinidad and Tobago—With its population of approximately one million, this is the largest country of the Eastern Caribbean, the most developed industrially, and has the highest per capita income. Its economy has been based on sugar, petroleum refining and petroleum extraction to a large extent, but more recently it has expanded rapidly into secondary manufacturing so that today more than 350 consumer products are manufactured or assembled in the country. These range from soap and cigarettes to garments, paint, furniture, automobiles, nails, matches and pencils.

With this considerable industrial base, Trinidad hopes to encourage development in the following fields:

Catching, processing and marketing of marine foods; fruit and vegetable processing.

Manufacture of automotive parts, glassware, builders' hardware, and aluminum utensils.

Manufacture and assembly of electronic components, tools, power tools and agricultural machinery.

The tourist industry and services ancillary to tourism such as hotels, marinas, marine charter services, etc.

A foreign contribution in capital, management and technology to any of these developments may be desirable, even though Trinidad's policy in some fields is to encourage putting a portion of equity control in the hands of local

interests, either the Government itself, public shareholders or large private investors. Potential investors are advised to seek guidance at an early date from the Trinidad & Tobago Industrial Development Corporation.

Guyana—Guyana, with a population approaching 700,000, has the largest land area in the Eastern Caribbean (83,000 square miles) and is one of the few countries in the area which has large unpopulated, under-developed and (to some degree) unexplored lands and resources. The economy is based on bauxite, and on rice and sugar cultivation, but some secondary industry has been established, partially linked to the basic three.

Future developments in Guyana are to a large extent related to the hinterland, where there are rich mineral resources, including prospects for finding iron, copper, tungsten and lead, as well as some diamond and gold mining. The bauxite industry, a large part of which the Government of Guyana now owns, may well be expanded to produce more calcined bauxite and eventually, with the development of greater electric power, aluminum smelting. The forests of Guyana have been largely unexploited and future developments may call for an integrated forest industry, including modern extraction equipment, a pulp and paper complex, a number of small and portable sawmills, small wood-converting factories (millwork and furniture, etc.). Also in the interior of Guyana is the dry savannah country of the Rupununi district, where large-scale expansion of cattle ranching is planned. To service this industry, Guyana will require one or more small meat packing and processing plants, an offal rendering factory, a tannery and, perhaps arising from the latter, a leather goods industry. Other Guyana plans call for a vegetable oil factory using soybeans, peanuts, copra and corn; processing of fruits and vegetables; the development of a native fishery, including the acquisition of boats and equipment, and any manufacturing beneficial to the economy.

The Government has made it clear that all significant economic sectors will eventually be subject to government and/or local public control.

As a general guideline for new investments, the government has indicated that it will have majority equity control of resource-based industries, such as mining, forestry, fisheries, etc. Most small service industries, (such as food processing) where possible and practical, will be reserved for co-operative ownership, and secondary manufacturing industries may either be co-operative-controlled or have a varying blend of government, public and private (foreign or local) ownership, depending on the circumstances. Potential investors should discuss proposals with the Guyana Development Corporation and the Ministry of Economic Development.

Surinam—This fascinating country with a racially diverse 350,000 people is closely associated with EEC but is increasingly Caribbean-oriented. Like Guyana, it has extensive agricultural, fisheries, forestry, mining and waterpower resources. The economy to date rests heavily on the bauxite-alumina-aluminum industry, and to a lesser extent on agriculture, forestry and fisheries. Future development will depend mainly on expanding these present developments but also includes plans to promote more agricultural industry such as food processing, and import-replacing small manufacturing industries.

In June 1971, the Government issued a concise policy statement outlining a Joint Venture Development Strategy, which it hopes will promote development, reduce risk to foreign investors, and guarantee a durable, peaceful co-operation with foreign guidelines for harmonious co-operation between local and foreign capital so that risk of future friction and possibly nationalization is reduced to a minimum.

Barbados—The "Little England" of the Caribbean, Barbados and its 250,000 inhabitants are well known to thousands of Canadian tourists. An amazing postwar hotel development has made tourism the number one industry, followed by agriculture and small industry. Further development of hotels, housing, and condominium projects is expected in future years, and will keep Barbados the leading tourist island. Secondary industry, particularly types related to tourism, to import-replacement, or export-oriented, as well as other high employment but non-resource related industries,

will continue to attract attention. Barbados' greatest resource is its people, who collectively are perhaps the best educated and most adaptable in the Caribbean.

Although the 1972-76 Development Plan will call for more effort to stimulate greater local investment, Barbados welcomes proposals from foreign investors. These should, in the first instance, be discussed with the Barbados Industrial Development Corporation.

Leeward and Windward Islands—This group of islands collectively has the greatest problems in the Eastern Caribbean: unemployment, growing populations, and low incomes. This is because these islands lack potential resources to be developed to solve these problems. Each island has its own climatic and geographical character which, in turn, directs it to tourism or to more agriculture. Antigua is a highly developed tourist island; St. Lucia and Grenada have made substantial progress in this direction, and St. Kitts and St. Vincent are beginning to plan for tourism. Dominica and Montserrat to date are largely undeveloped to handle tourists because of their rugged terrain, lack of white sand beaches and high rainfall. Sugar cultivation, once the economic basis for Antigua and St. Kitts, has rapidly deteriorated and so, to some extent, have spice, citrus and

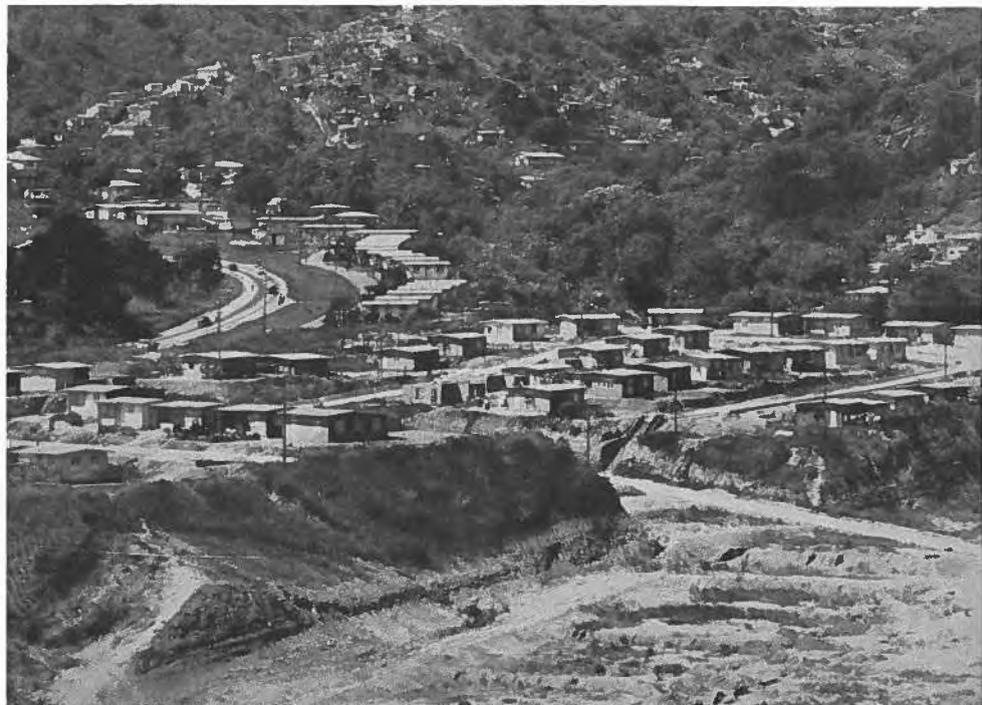
banana cultivation in the other islands because of the high-cost, low-price squeeze affecting their products in world markets.

To solve these economic difficulties, tourism has been and will continue to be the first answer, but additional efforts include the upgrading and diversification of agriculture, particularly in animal husbandry and food processing, and the attraction of small, labor-intensive industries to give employment. Investors or developers who have proposals in these areas will find a ready welcome in the small islands.

Infrastructure—Quite apart from commercial possibilities, the development of the Caribbean will entail continued expansion of public construction and improvement in infrastructure. Such projects will include road-building; airport expansion; port facilities and harbor developments; land drainage; water and sewage projects; hydro-electric developments, and schools and hospitals. Much of this construction is being carried out with financial aid from international or bilateral agencies, including the Canadian International Development Agency. Canadian firms wishing to participate in projects of this sort should contact the Department of Industry, Trade and Commerce, Ottawa, or the Trinidad office.



This shows a typical housing development scheme in Trinidad that was started last year for low-income groups. There is a need for about 5,000 houses a year and supplies for the construction industry is one of the areas open to Canadians.



Harvest from the Seas

Eastern Caribbean islands are building up their fishing fleets. They need trawlers now, and equipment ranging from retail cabinets to storage facilities soon.

JOHN A. AHOW, Commercial Officer, Port-of-Spain

Three hundred thousand tons of food fish for the taking, says the Caribbean Fisheries Development Project.

After six years of research in Caribbean fish resources, the Project, which ended last September and which was executed by the Food and Agriculture Organization under the United Nations Development Program, has assessed the two known major fishing grounds in the region. According to its report, the larger, stretching from the south of Trinidad along the continental shelf of the Guianas to the Brazilian border, can sustain an annual harvest of 200,000 metric tons of food fish. The smaller, along the offshore banks west and southwest of Jamaica, could produce 100,000 metric tons a year of snapper, grouper and other deep-sea species of fish.

In addition to surveying the fisheries resources of the area, the Project implemented ways to improve marketing arrangements throughout the region, and to train local fishermen in the handling of modern equipment and large modern fishing vessels.

In its last two years of operations, the Project was also engaged in promoting investment in deep-sea fishing, but with little, if any, success.

The Caribbean islands have traditionally relied on inshore fishing for their supply of fresh fish. Generally, this is done in open boats of 12 feet up to about 40 feet in length. Some of the smaller boats still use oars but, in recent years, there is a trend toward inboard and outboard motors, with assistance from governments in the form of import duty rebates on motors and tax-free gasoline. Because these boats carry no ice, fishermen return to port usually between 12 and 16 hours from the time they set out. It is estimated that in Guyana there are 1,200 of these small boats, 1,100 in Trinidad, and about 470 in Grenada.

The Project discovered that the inshore resources of most of the Lee-

ward and Windward Islands have been over-exploited and offer little prospect of increased production. Nevertheless, there is widespread interest in these islands in improving their fishing industries, particularly in the areas of better landing and handling facilities, refrigeration, distribution and marketing.

It is estimated that the two major fishing grounds could together support a fleet of about 400 vessels, in addition to shrimp trawlers. It is evident from the survey that future large-scale development of the fishing industry of this area lies in deep-sea fishing; and that Trinidad, Barbados, Guyana, Surinam, Jamaica, and perhaps Grenada, because of their close proximity to the major fishing grounds are better placed than the smaller islands to develop this type of fishing.

The Caribbean countries consume an equivalent of 266,000 metric tons of whole fish a year, of which only 65,000 metric tons are produced from inshore fisheries. There is, therefore, a large demand which can be supplied from the resources mentioned.

To bring this fish to market, however, requires large investments in trawlers, continued training of fishermen in the handling of modern equipment and large boats, fish landing facilities, and marketing. As yet, private investors and entrepreneurs are lacking, except in Guyana. Governments, however, are convinced of the viability of such an industry and have decided to form a Caribbean Fisheries Research Institute to succeed the UNDP/FAO Fisheries Development Project. The main objectives will be:

Workers in this Caribbean fish processing plant are definning and eviscerating a catch of carite (Spanish mackerel) before the fish are frozen. Caribbean countries consume the equivalent of 266,000 metric tons of whole fish a year.





Shrimp for export are packed in boxes in this modern processing plant in Trinidad. During the past 10 years, a lucrative shrimp industry has developed in the Caribbean and in 1970 there were more than 500 trawlers in local fleets.

1. to train fishermen in the use and handling of modern equipment and large fishing boats;
2. to develop and improve the marketing of fish, and
3. to promote investment in the deep-sea fishing industry.

The Trinidad Government, in preparation for the development of this industry, has planned to start within the next few months the construction of modern landing facilities and a new wholesale fish market with adequate cold storage, at a cost of more than \$2 million. The Government is also prepared to help finance the purchase of trawlers by private enterprise. The trawler obtained last year from Canada through a Canadian soft loan is being outfitted to train local fishermen.

In Guyana, the development of a deep-sea fishing industry is slightly more advanced. Guyana Marine Foods, a Government corporation, has been established, and 10 trawlers (five from Colombia and five from Mexico) have already been ordered at a total cost of over \$1 million. Five of these

boats were to be delivered before the end of 1971. The Government has stated that the new company will buy a total of 100 trawlers by 1976, and that it will also process and package fish in various forms.

Over the past 10 years, a lucrative shrimping industry has developed, with trawlers operating out of Guyana, Surinam, French Guiana and Trinidad. In 1970, there were more than 500 shrimp trawlers operating, with landings during the year of 12 million pounds in Guyana, five million in Trinidad, and eight million in Surinam. The great majority of these boats are owned and operated by foreign interests, and the shrimp are processed in local plants and virtually all exported to the United States.

The major shrimp fishing ground is off the Brazilian coast, and the extension of territorial rights up to a limit of 200 miles imposed last year by the Government of Brazil has resulted in a serious setback to the shrimping industry of the Caribbean countries, especially Trinidad. Trinidad has since signed a temporary

agreement with Brazil permitting a maximum of 50 Trinidad-owned or registered boats to fish in Brazilian waters, and is currently negotiating a longer term agreement. The restrictions resulted in the number of trawlers operating out of Trinidad being reduced from 109 to 36 in October last year. This, therefore, has created a need for at least 14 trawlers.

The impression given here is that there is an immediate need for 24 shrimp trawlers in this area, with a potential market in the longer term (two to five years) for a further 185 trawlers (figures in brackets) approximately as follows: Trinidad 14, (50); Guyana 5, (95); Surinam 5, (40).

They should be approximately 75 feet over-all length and cost between U.S. \$90,000 and U.S. \$150,000—buyers are not interested in higher-priced boats—and be made of wood, steel, fiberglass, aluminum or even ferro-cement. Canadian-designed trawlers may well find a market if they are competitive, not over-built or too highly sophisticated for the needs of the area, but the competition will be fierce particularly from the United States, Mexico and Colombia.

The future looks good for the Eastern Caribbean fisheries industry, particularly in the larger territories of Trinidad, Guyana, Surinam, and to a lesser degree in Barbados. There is a potential market for perhaps over 200 fish and shrimp trawlers over the next four to five years. Canadian boat builders interested in supplying this market would be well advised to investigate the possibility of a joint venture or licensing arrangement, particularly in Guyana or Trinidad where there is already some expertise in boat building. It is the objective of island governments that the fleets and the industry should be locally owned.

The development of the fishing industry also means equipment and plant for processing, landing equipment, refrigeration equipment and storage facilities, proper retail cabinets, and pumps, winches and other trawler equipment, as well as perhaps ice-making equipment for the boats.

For further details, interested Canadian suppliers should write to the Commercial Secretary, Canadian High Commission, P.O. Box 1246, Port-of-Spain, Trinidad, W.I.



Forestry Potential Is Promising

East Caribbean islands are waking up to the value of their more than 100,000 square miles of virtually virgin forests. But they need roads, equipment, capital—even port facilities. Canadians could supply much of what they want.

P. S. DINGLEDINE, Assistant Commercial Secretary, Port-of-Spain

Few resources in the Eastern Caribbean are as unexploited as the extensive tropical forests. Only recently have local governments and private entrepreneurs awakened to the prospect of a major export industry based on the harvesting of a wide variety of tropical woods. The exploitation of these areas holds promising rewards, but many problems are still to be overcome.

The forest potential in the Eastern Caribbean is concentrated in the islands of Dominica and Trinidad, and in the mainland countries of Guyana and Surinam. While the Dominican and Trinidadian reserves are limited by the size of the countries themselves, Guyana reports over 70,000 square miles of virgin forest, and Surinam more than 30,000 square miles. The list of species in the area is almost limitless, as there is a wide variety of tropical woods indigenous to each country. These include greenheart, crabwood, wallaba and mora in Guyana; purpleheart, bolletrie and barklat in Surinam; cypre, cedar and mora in Trinidad and gomier in Dominica.

Guyana—In spite of the potential utilization of the forests and the development of forest-related industries have been far from spectacular, particularly in Guyana. The value of that country's exports of timber did, in fact, decline between 1960 and 1968 to an annual amount of about \$1.7 million. In 1969 only 6.1 million cubic feet of lumber were produced from the state forests. Of this, 62 per cent was accounted for by greenheart, the most important species because it is not found in commercial

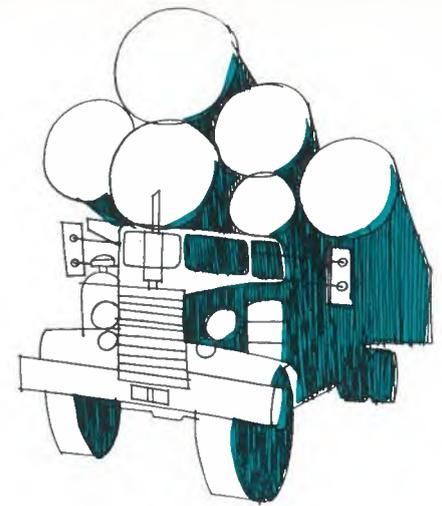
quantities in any other part of the world. Most of these exports were to the United States, Britain and Holland in the form of sawn lumber, round piling and hewn squares.

The equipment in Guyana available for the exploitation of the forest resources is limited. Chainsaws have recently been introduced in some quantity and are having a revolutionary effect upon production volume. There are three skidders in operation, and most of the hauling is done by adapted farm tractors. Other heavy equipment is non-existent.

The sawmilling industry is the main outlet for timber from the Guyana forests. There are 64 sawmills in existence, almost all of them small. Production is low because of old and poorly maintained equipment, inefficient methods, and the lack of trained personnel. There are no other bulk-using timber industries, in spite of the fact that research has shown that a pulpwood industry may be viable.

The availability of greenheart in Guyana has been a mixed blessing. In the past commercial timber companies concentrated on this one species and "creamed" those localities where it predominated. The few access roads were built to these localities and, because the industry was founded on the export of a single species, the sawmills were located near the coast rather than near the forests.

Surinam—Development of the industry here has been based over a longer period. Unlike Guyana, where no large companies have major operations, Surinam has several. By far the largest is Bruynzeel Suriname Houtmaatschappij N.V., a subsidiary



of Bruynzeel N.V. in Holland. This company operates forest concessions, a sawmill, a plywood plant, a flooring factory, a modern lumber yard and is a major producer of prefab buildings. It produces more than 120,000 cubic meters of wood a year, half of it from its own forest operations. In addition to the larger companies, there are approximately 25 sawmills in operation. As a result of the larger capital investment, there is more logging equipment in Surinam than in the other Caribbean countries.

Trinidad—Less developed in its forest industries than Surinam, Trinidad has made some progress in forestry and related activities. Nearly 45 per cent of the land surface of Trinidad and Tobago is covered in forest. Commercial timber, however, is restricted to about 850 square miles. The annual yield from this resource is about 18.5 million board feet, much of which is used domestically. There are more than 60 firms involved in sawmilling, but few have substantial capacities or the need to buy the heavy equipment. The use of adapted agricultural tractors, as in Guyana, seriously limits the efficiency of the extraction process. Skidders are not used, but prospects look good for some Canadian sales in the near future. There has been some development of the industry, however, and creosoting, fencing, parquet tile and preservative plants are all in existence, plus several established wood-working industries. There are, however, no pulpmills, nor plywood, veneer or particle board plants.

Dominica—One of the Leeward Islands and much smaller than Trinidad

and Tobago, Dominica is estimated to have approximately 70 square miles of forested land, with a potential production of 10 million board feet a year. Dom-Can Timbers Ltd., a co-operative of Dominican and Canadian interests, has logging rights over much of the land and is operating a sawmill in the island.

From the point of view of Canadian interests, Trinidad and Tobago and Surinam have definite potential for equipment sales, but the big developments over the next decade are bound to be in Guyana. There are, however, several obstacles to be overcome in all the Caribbean countries, but primarily in Guyana.

The foremost of these is access to the forests. Most timber areas in Guyana are virtually inaccessible by road, and the many rivers are for long reaches not navigable. Guyana has no suitable road-building materials and the terrain is difficult. The old logging roads not only lead to the wrong places, but were intended only for short-term use by small pieces of equipment and are not suitable for conventional logging equipment. They are also easily washed out.

Lack of exploitation of the forests has resulted in overmaturity,

with a high percentage of defective logs. The percentage is, of course, highest in the large trees and studies have shown that most trees much over 20 inches in diameter are of little use. Many of the tropical timbers have a large proportion of sapwood and unless they are preserved and seasoned quickly, deterioration is fast. Facilities for this, as well as for grading of timber, are poor. In addition, port facilities are not capable of handling long lengths of timber. Loading is slow and what few boats are available often cannot afford to wait.

An FAO study group that has been working in Guyana for the last five years is just completing its report. The Forest Industries Development Survey team compiled a major inventory of the species available and the economics of exploiting them, and has hastened the training of personnel, the upgrading of equipment and the installation of new facilities. It is possible that more aid will be forthcoming from multilateral institutions and interested Canadian companies would be wise to keep abreast of developments.

Although progress is being made, it is certain that nothing substantial

will develop until there is a major influx of foreign capital in logging, sawmilling and, possibly, pulpmills or plywood mills. As in most countries, however, local governments prefer to participate in the extractive industries. In Guyana, although the policy has not yet been firmly stated, it appears that majority participation by the Government is the rule. Rights of the minority partner would be guaranteed, and marketing, technical and managerial expertise, purchase and import of equipment might all be part of a bargain worked out between the two parties. With regard to land use, concessions would probably be leased on a long-term basis.

In Trinidad, Dominica, Guyana and Surinam, there is clearly great potential wealth in the form of virgin tropical forests. But the conversion of this wealth into a saleable product will take co-operation, expertise, time, and a good deal of money. Canadian companies who are interested in participating, from the point of view of either equipment sales or investment, should contact the Commercial Secretary, Canadian High Commission, P.O. Box 1246, Port-of-Spain, Trinidad, W.I.



A Trinidadian forestry worker uses a simple lever to shift a log into position on a truck. This photo shows the typical equipment and techniques being used in Caribbean forestry. Note the deterioration in the center of the log.



Hardware and Housewares... the Demand Grows

Householders want and are buying the latest in fixtures and furnishings. Many more people want their own homes and as new housing is built the market for builders' and general hardware will grow.

DESMOND HOBSON-GARCIA, Commercial Officer, Port-of-Spain

Canada is steadily increasing the range of products it sells to the Eastern Caribbean countries, including the Guianas on the Atlantic coast of South America, but more can be accomplished and builders' and general hardware is a case in point. In the more sophisticated markets in this area—Barbados, Guyana, and Trinidad and Tobago—the trend to shopping centers is growing and, as in Canada, these centers carry a wide variety of products, including hardware. As well, the lumber and hardware trades, which used to be in the hands of three or four large companies, have spread out and many small outlets are springing up throughout these countries.

These trends, plus a general shortage of housing, create new sales opportunities for builders' and general hardware, including such items as gadgetries, fittings, trimmings and furnishings. Formerly, distribution of these products was in the hands of the few large firms which represented the supplier through their agency department, and before 1939 were tied mainly to British suppliers. Today, hardware imports are worth approximately \$20 million, of which only about 10 per cent comes from Canada. The main suppliers are Britain, Europe and the United States.

There is an acute housing shortage throughout the Caribbean. To meet demand in the countries of this area it is estimated that annual construction of units should be: Guyana 5,000, Trinidad 10,000, St. Vincent 880, St. Lucia 4,000, Dominica 600, Barbados 1,500, Surinam 1,500. The governments are seeking assistance from international agencies and devel-

oped nations. But generally, the hope is that a new type of low-cost housing will be designed so that construction can be accelerated.

At the same time, as standards of living improve, more people want to own their own homes. As houses are built the demand will increase for such items as—starting at the front walk—gates with handles, hinges and locks; lamps for posts; tiles, aggregates and chemical specialties; and patio furniture of all kinds.

Many styles of living room and dining room furniture are selling; upholstered living room suites are quite popular. Built-in kitchen cupboards (in some cases the knocked-down ready-to-assemble type) are finding acceptance, and housewives are buying modern appliances.

Modern design is wanted in bedrooms, especially in headboards. Built-in closets are still popular but vanity

sets and chests of drawers in blending colors are becoming the in thing. Bathrooms are getting a little larger, especially in the homes of the affluent, with extra accessories in a dressing area, and drapes and carpets.

The development of local manufacture has created a demand for components, such as springs, casters, wire clippers, draw knobs and pulls, edgings, felt, glides, etc.

There is a growing market for general builders' hardware, such as door locks, hinges, panelling, roofing materials, sanitary ware, plumbing brass, electrical fittings, door chimes and ornaments. Builders are now using sliding aluminum doors as well as solid and panelled wooden doors; most inside doors are panelled hollow plywood. Windows vary from steel and aluminum to louvre frames and wood.

The usual method of selling in the Eastern Caribbean is either direct-

Trinidad, the largest market, imported these in 1970 ...

Total	... from all countries		... from Canada	
	T\$22,973,533		T\$1,747,384	
Builders and general hardware				
steel	1,693,905		62,877	
wood	2,328,262		346,521	
asphalt and cement	536,701		4,494	
Furniture (fittings and materials)	3,085,626		266,851	
Tools	2,801,592		235,934	
Utensils	1,081,457		8,222	
Drapery	661,690		19,537	
Carpets and carpetry	1,810,259		288,964	
Metal manufactures n.e.s.	6,631,554		416,723	
Lamps and fittings	690,581		97,261	
Wall tiles (glazed)	562,178		n.a.	
Glass	1,089,728		n.a.	

One Trinidad dollar equals Cdn.\$0.50.

Shoppers at this modern store located just outside Port-of-Spain, Trinidad, can buy the latest in household furnishings and up-to-date appliances. In the more sophisticated markets in the Eastern Caribbean the trend toward shopping centers is growing.

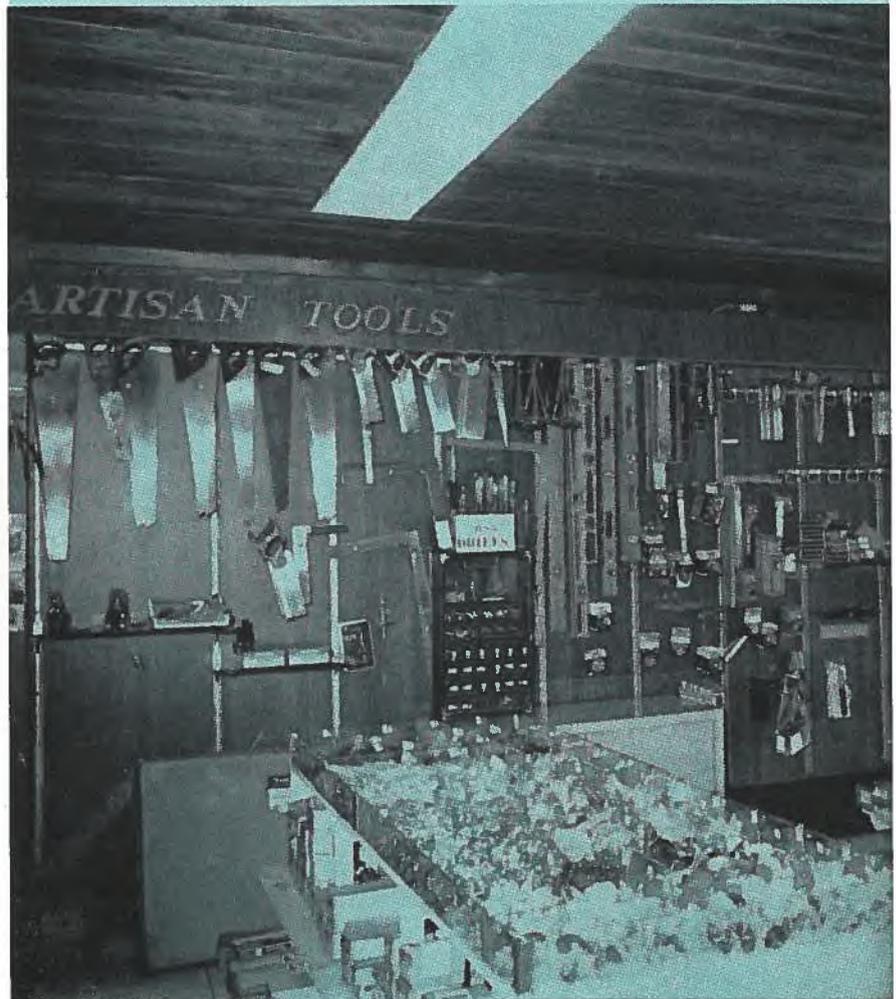
ly to merchants or distributors, or indirectly through commission agents who book orders from the importer on an indent basis. Some agents also carry stocks so that they can achieve wider distribution and always have supplies available. Quotations should be c.i.f. port of entry. Correct documentation is essential. Incorrect invoices or certificates of origin can result in delays in clearing goods, costly warehouse rent, and a heavy customs fine, all charged to the Canadian shipper's account. It is important to send letters airmail.

Canadian firms entering these markets for the first time would be well advised to get in touch with the Caribbean Division, Office of Area Relations, Department of Industry, Trade and Commerce, Ottawa.

Many of the well-established agencies are now looking for new lines, and the many new, energetic firms that have come on the scene are looking for new ideas in building supplies to promote and sell. Interested Canadian firms are urged to write to the Commercial Secretary, Canadian High Commission, P.O. Box 1246, Port-of-Spain, Trinidad. Send us descriptive literature and c.i.f. prices so that we can investigate the sales possibilities for you. We look forward to hearing from you.



Tools and other building items are brightly displayed in the hardware section of a modern shopping center complex in the Caribbean. Hardware imports to Barbados, Guyana and Trinidad and Tobago are now worth about \$20 million of which only some 10 per cent comes from Canada.



Cabinets for California Kitchens

They are made in British Columbia and, thanks to efficient production methods and attractive designs, are finding customers among Californian contractors.

O. MARY HILL

Many Californian housewives moving into apartments these days find in their kitchens attractive cabinets that come from Canada. They are produced by Crestwood Kitchens Ltd., a firm that went into business in Richmond, B.C., in a small way in 1947. Since then, it has combined good design with production economies based on technical advances, and with sound market research. This combination has made it possible for the company to crack the tough market south of the British Columbia border.

We talked not long ago with Cecil Latta, general sales manager of Crestwood, and asked him a number of questions about how the firm met and solved the problems of entering a sophisticated, highly competitive market. Some of these questions, and Mr. Latta's answers to them, are given below.

What led Crestwood to think of looking for customers in the United States?

Originally we made high-cost, high-priced, all-wood cabinets and had a modest sales success with them. With the appearance of the high-rise, we realized that there was a mass market to capture if we could come up with a cabinet that could be efficiently produced and could sell at a reasonable price. We began to think in terms of standard components and of using hardboard and other wood composition products. Out of these studies came the Unital line, which was soon accounting for 60 per cent of our production. It is built on the three-inch modular concept, with only four standardized pieces needed for the average apartment kitchen, in place of the former ten.

Did you make other production changes?

We did, and one of the first steps in achieving production economies

was the perfecting by someone on our staff of a machine that would bend hardboard one-eighth of an inch thick into the desired shape by the use of steam and pressure. This machine has of course been improved in the ensuing years.

When you decided to look to export markets, what were your first steps?

Our first step was to determine what our export price would be, whether it would be competitive, and whether we could make a profit. This investigation had several phases. Since the United States was the nearest and most likely market, we discovered how our product would be classified for tariff purposes and what the rate of duty would be. We found it would be 10 per cent, going down to 5 per cent when the Kennedy Round reductions are completed. We got information on export drawbacks on the parts we im-

ported. Then we studied transportation costs, a big factor with a product like ours. We decided that the economic limit for shipping would be 1,200 miles, and this too helped to define our market. We worked out the break-even point and then our United States selling price. We quote now "tail-gate, job site," state taxes paid, and we use a customs broker at the border.

Did you do any market research, and how much?

Once we were assured that we could sell at a competitive price, the next question was, would the United States consumer like and buy what we had to sell? Would our designs win favor? So we began to try out public taste. We did this both by personal visits to California and calls on contractors, and by exhibiting at trade fairs—though that came a bit later. Then we chose Seattle as a test area

This housewife seems to be pleased with her choice of cabinets. It's the Marquis line, with a Spanish Mediterranean touch. Like all the Unital models, only four pieces are needed for the average-size apartment kitchen.



and sold one or two accounts. Our feeling is that doing a thorough job of market research takes at least two years.

How did participation in trade fairs help you?

We went first into the big Association of Home Builders' show in Houston, Texas, in the spring of 1970, where we were part of a collective Canadian exhibit sponsored by the Department of Industry, Trade and Commerce. I went down myself to man the booth, all prepared to quote firm prices. I found great interest in our units and I noted reactions from visitors to our exhibit carefully. I talked with potential buyers from California, Washington, Oregon, and Montana, all within our economic shipping range. I handed out color brochures on the Unital cabinets and comments on these were good. As a result of our success at Houston, we have since entered the Pacific Coast Builders Conference Show in San Francisco.

Is buying done differently in the United States?

We have found that in Canada it is usually sufficient to call on general contractors and sell to them. But in the United States (or at least in California) we found that we have to call not only on the contractor, but also on the architect, who must approve the design, and the land developer. That takes three salesmen where one will do here. Another task is to convince them that you will be able to deliver on time; that when the kitchen is ready, the cabinets will be there, ready to install. In the minds of many, British Columbia is still a long way off. In the course of this research, we also had to find out about United States standards. We make to those building standards and sell the same product in Canada.

How did you decide on the right time to enter the United States market actively?

We waited for the right combination of circumstances before launching our sales campaign. That happened in June 1970, when we made our first sale in California. By that time we had a product of the right quality, a market that we felt would accept it, a well-worked-out and competitive



Exhibiting at trade shows attended by the general public proved to be one of the best ways for Crestwood to find out whether the American consumer would approve of its designs. Above is a display at a Pacific Northwest fair.

price, and sufficient assurance that we could make exporting pay. We also had a sales setup.

What type of sales setup did you choose?

We elected to open our own sales and distribution unit in Campbell, California, south of San José, and we sent down one of our own men to take charge of it, assisted by one salesman. Their job was to call on the right contacts. We give these men a good deal of responsibility; they must obtain complete information on customers or potential customers. We now employ a manager and three salesmen. We must, of course, provide both installation and after-sales service for our customers.

What type of advertising do you undertake?

We do two types of advertising: in trade journals and by direct mail. We take space in the magazine put out by the Home Builders' Association, in the *B.C. Journal of Commerce*, and in the *California Builder*. None of our advertising is directed at the retailer. The direct mail pieces that we prepare go out to contractors, and our salesmen help us to build up a good mailing list.

It is now about 18 months since you made your first export sale. How are things going?

We feel that they are going along well. We are working today with five major accounts and we hope that 1971 contracted sales will total \$1.0 million. We have also made a start in Hawaii, where we did some prospecting three years ago. There we sell to the small-homes market and we ship, as I pointed out before, in containers.

What, in your opinion, is the most difficult part of exporting?

I would say that it is winning acceptance in your chosen foreign market. This includes not only acceptance of your product as being well designed and competitively priced, but goes beyond that to acceptance of the company's personnel and of the company itself as a reliable and good supplier. It is this relationship of trust and confidence, that can only be established over time, that I feel is the real secret of continued success in a foreign market.



O. Mary Hill, the author of this article, is the former editor of this magazine.

How Ireland Encourages Its Exporters

To motivate Irish industry to compete effectively in foreign markets, the Government offers several types of incentives.

It also offers tax and other exemptions to attract new industry.

R. A. BULL

Commercial Counsellor, Dublin

Limited by the size of the market, protected from competition, usually owned by large outside companies, many Irish firms have had little interest in exporting. Some had trouble even holding their own against imports when a policy of tariff reduction was adopted early in the 1960's. A few of these have closed down and others continue to be protected for social reasons, even though their production is uneconomic. But many formerly protected industries with energetic, usually Irish, management have found markets abroad for their products and are doing well. In recent years they have been joined by hundreds of new factories, built almost entirely for export, lured by government aid and the economic attractions of doing business in Ireland.

Irish policy today is to increase competition selectively. Goods not locally made enter duty-free. Products of particular local interest and significant export potential are often kept out. Many industries are still protected and the authorities openly admit that the tariff is for protection, not revenue. Importers who can prove that they are importing goods that cannot be produced locally (usually by a letter from the local producer of the closest equivalent) may receive a Ministerial licence excusing them from paying duty or lowering it.

Internationally, Ireland belongs to the GATT and is in the process of completing a Free Trade Agreement with Britain. The latter will exchange improved access for Irish agricultural products for removal of duties on about 70 per cent of Irish industrial imports from Britain. The Agreement, signed in 1965, is now half completed. It has been overtaken by the Irish ap-



Young Irish workers, like this lathe operator, are taught new skills by top American and British technicians at the Shannon Airport Industrial Estate where businessmen are offered full export tax relief until 1990.

plication to join the European Economic Community. When Britain goes into Europe, Ireland will follow because the Irish would retain the valuable British market for agricultural products at higher prices than they have been able to get in Britain in recent years. Those Irish industries which have been founded for export should find their access to European markets enhanced. New industries are expected to come, drawn by the ad-

vantages of plentiful labor, inexpensive sites and services, and the closeness of Ireland to North American markets.

Ireland is now reasonably well-equipped to benefit from the more competitive trading atmosphere the ECM will provide. This improved position has been fostered by several official initiatives, outlined below.

Attraction of Export Industries—A generous system of grants for new industries, flexibly administered, has

attracted many foreign investors to the Republic in recent years. The Government is now prepared to pay all labor training costs, as well as up to 35 per cent of the cost of sites, buildings and plant (the average grant is, of course, lower) in any district chosen by the investor. Local taxes are low and export earnings are tax-free for 15 years, with a tapering-off period of five years thereafter. This period of export tax relief extends up to 1990, while at the Shannon Airport Industrial Estate there is full export tax relief until 1990. If a businessman is prepared to establish his plant in a designated area in the less developed western part of Ireland, he qualifies for grants up to 50 per cent of the cost of sites, buildings and plant. Free repatriation of capital and earnings in the investor's own currency is guaranteed, and there are double taxation agreements with Canada, the United States, and a growing number of European countries.

The Shannon Airport Free Trade Zone is the best known center for export industries but industrial estates are being developed near several cities and plants may be built in smaller towns with full official assistance. In every case, if the company undertakes to export 95 per cent of its production, all raw materials or components required for manufacture may be imported free of duty with a minimum of delay. In the past ten years some 350 new manufacturing plants, with a capital investment of £94 million, have been set up in Ireland by overseas firms, providing 44,000 new jobs.

Development of Small Industries—Through the Small Industries Division of the Industrial Development Authority, the Irish Government seeks out local entrepreneurs who have worthwhile industrial projects that require finance. Since its inception in 1967, the Division has received more than 1,500 applications and granted a total of £3.5 million to about a third of the applicants, mainly to replace imports, but many of these small firms are potential exporters.

Industrial Design—The Kilkenny Design Workshops were established to encourage small, specialized, skill-based or knowledge-based industries. Opened in November 1965, they employ a staff of 60, including 12 professional designers, working in textiles, furniture, ceramics, metal, silver

and jewellery, wood-turning, graphics, packaging and engineering design. Designs are prepared at the request of local manufacturers to suit the skills of the employees and the nature of the materials to be used, bearing in mind the market for which the goods are intended.

The Workshops are financed by an Irish Government grant-in-aid of £160,000 (\$400,000) (1970/71). Of this, 32 per cent is currently recovered in royalties. Sales of Workshop-designed articles are expected to exceed £1 million in 1971.

Technical Assistance—Technical aid to Irish manufacturers and exporters is provided by the Institute for Industrial Research and Standards, "aiding existing industry to maximum efficiency in its current operations" and "exploring the better use of resources, whether by native or imported techniques and capital", with the aim of increasing industrial employment. In effect, the Institute acts as a research and development body for the whole of Irish industry and compensates for the low level of such activity in most local firms.

In its present creative role, the Institute dates from its reorganization in 1961. In that time the annual grants-in-aid have risen nearly 15 times to £660,000. By 1968, technical consultancy, testing, design and development, and applied research assistance had been provided to more than 1,000 firms. Sectors of activity include mechanical and industrial engineering, electronic controls, metallurgy and materials, food technology, chemistry, building materials, textiles and forest products. The Institute has a large library and information section and publishes a monthly magazine, *Technology Ireland*, which provides both articles on technology and industrial development in Ireland and notes new books and papers useful to local readers. Industrial Liaison Officers are available to visit industry and assist in developing and answering inquiries. The Institute is also responsible for preparing and publicizing Irish standards.

Shipping—In the days of wooden ships and iron men, every Irish port, however small, had some sort of shipping service. But as ships became larger and cargo-handling more sophisticated, the smaller, relatively higher-cost ports began to be passed by.

Recognizing the growing danger in 1965, the Irish Government added to its existing ships those of the old British and Irish Steam Packet Company, which served the routes between Britain and Ireland.

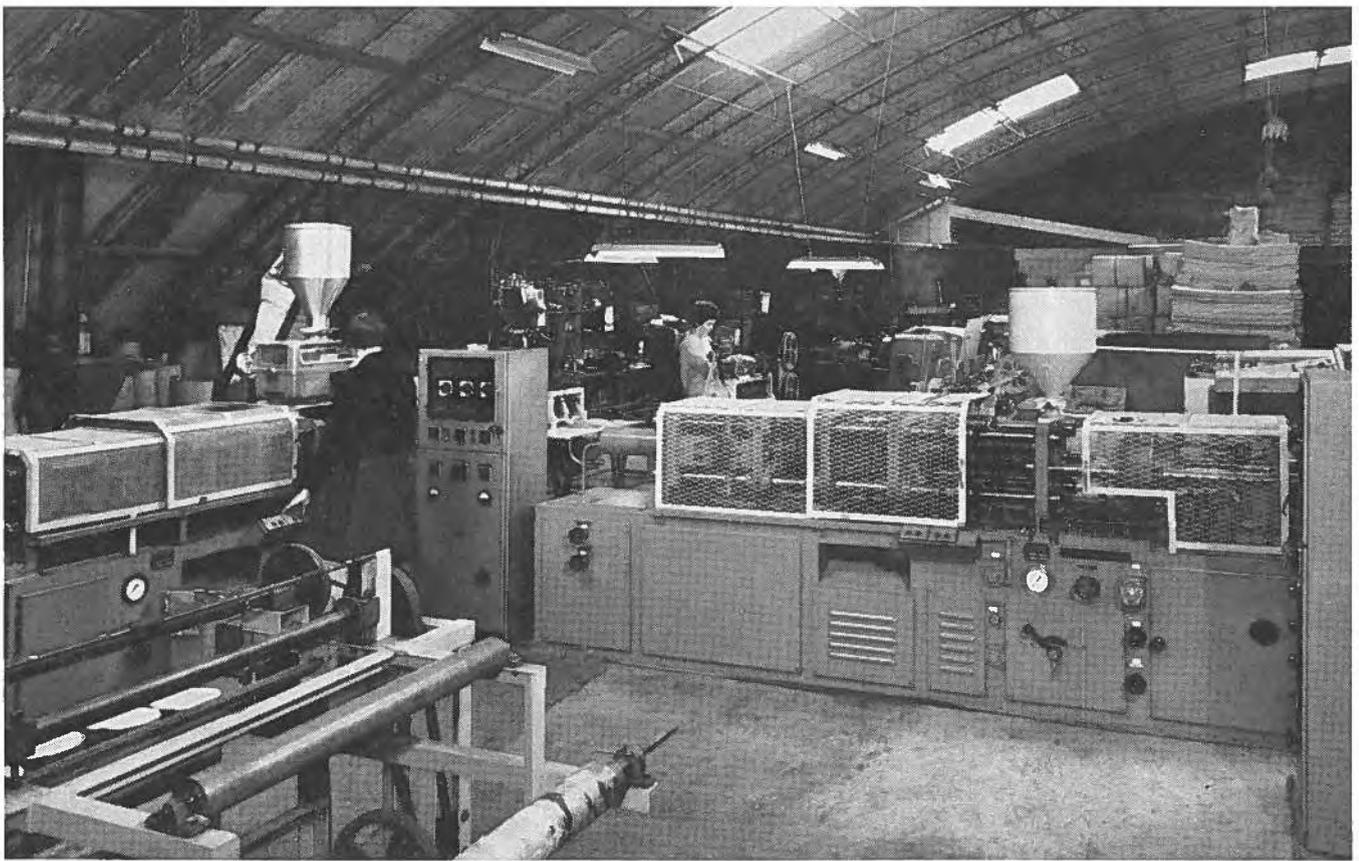
Renamed the B & I Line and assisted by government finance, this company now offers daily roll-on roll-off freight and car-ferry service between Dublin and Liverpool, Cork and Swansea. New and modified container ships have been bought and twice-weekly container services begun between Dublin and Cork and two European ports, Rotterdam and Le Havre, deliberately selected as offering the best access to the Common Market. Shipments are being co-ordinated with the Holland America Line through a joint company, Iropa Transport. This in turn will tie in with the ACL transatlantic container consortium. In 1970 B & I made an operating profit of over £1 million and carried 82,000 cars and more than half a million passengers across the Irish sea.

Taxation of Exports—A new tax aid to exporting is to be introduced next year. The present taxes on wholesale and retail sales are to be combined in a value added tax at equivalent levels. When goods are exported, exporters will be able to recover the entire VAT previously collected.

Export Credits Insurance—After lengthy discussion, the Irish Government announced early in 1971 an expanded scheme of export credits insurance. Previously, coverage extended only to political risks and exporters of goods were expected to negotiate coverage of commercial bad debts with the insurance companies.

The new scheme will cover both political and commercial risks. It will provide for short (up to 180 days) and medium (up to five years) credit insurance through policies from date of contract or date of shipment of goods. The insurer is the Insurance Corporation of Ireland. Terms and coverage are to be comparable to those offered by the Export Credits Guarantee Department in Britain. Exporters using the short-term policies will be expected to insure the whole of their annual export turnover, including exports to Britain. Level of coverage is subject to the creditworthiness and payments record of the





Corners for photos and other small paper items are manufactured at the Eugen Dahm Paper Mills Ltd., a Canadian-associated company at Kenmare, County Kerry. A grant system for new industries has attracted many foreign firms.

customer. Normally 90 per cent of loss will be paid. Recoveries will be divided 90:10 between insurer and exporter.

In the case of medium-term export credits insurance, the nature of the goods and the terms of the transaction dictate that a separate and specific policy be negotiated to cover each contract. Insurance will run from date of contract. Export credits insurance premiums are an admissible expense for tax purposes. It is anticipated that the new insurance scheme will make it easier for Irish exporters to obtain financing for export shipments.

Export Credits Insurance—Services—Cover has long been available from the Insurance Corporation of Ireland for Irish firms undertaking consultancy and design work of various kinds abroad against commercial default of an overseas principal. Since 1969 the Corporation has also been authorized to provide political risk cover in certain circumstances that include war and civil disturbance, currency transfer restrictions, and protracted default in payment. The Corporation's liability is limited to 90

per cent of the loss. Each contract for services insured is subject to separate negotiation, depending on the country and nature of the risk.

External Trade Promotion—An interesting aspect of Irish administration which bears significantly on exports is the use of autonomous public boards or, as they are generally known, semi-state bodies. These include not only what in Canada tend to be Crown corporations, such as Aer Lingus, the Electricity Supply Board, and Coras Iompair Eireann (Irish Transport Company), but also specialized marketing bodies with a role in overseas sales: Bord Bainne (Milk Board), Bord Failte (tourism), and Coras Trachtala (Irish Export Board). (The Canadian equivalent of the latter is the Foreign Trade Service, part of the Department of Industry, Trade and Commerce.)

In addition to helping directly with the sale of Irish exports abroad, Coras Trachtala has a Shipping Information Section which provides exporters and potential exporters with advice and information on all aspects of transportation. The section negotiates complaints on transport matters, and

publishes a monthly shipping list of direct sailings from Irish ports.

Coras Trachtala, through the Shipping Information Section, participates in a public company, Shipping Services Limited, a co-operative customs clearance agency to which many Irish exporters belong. Services offered include documentation, warehousing, delivery in Britain by the company's own trucks, customs and tariffs advice, and grouping or breakdown of bulk containers.

Results—Since 1960 Irish imports and exports have doubled, but a significant balance-of-payments deficit remains. During the same ten years, exports of live animals rose about 50 per cent, exports of food, drink and tobacco nearly trebled, and exports of raw materials and manufactures increased to more than four times the 1960 level. In 1970, the value of manufactures exported exceeded the value of meat and dairy exports for the first time. The Irish economy is changing and becoming more competitive, and the export incentives described above are contributing to this change.



Wanted: Manufacturers

This information is intended to promote additional manufacturing in Canada. Further material on items listed is for prospective Canadian manufacturers only. No responsibility is assumed for claims or statements made. Address inquiries, quoting item numbers, to: Industrial and Trade Enquiries Division, Department of Industry, Trade and Commerce, Ottawa, K1A 0H5 Canada.

Roll formed metal sheets

British firm is seeking a licensing or joint venture arrangement with a Canadian company to manufacture and market its metal cladding sheets for roofs and walls. The system incorporates metal forming concepts which result in a machine possessing fewer stands of rolls. Additional profiles from one machine can be produced by a raft or cartridge system. Three types of profiles are available incorporating hidden fastening systems that do not require the sheeting to be punctured for fixing purposes. The profiles can be produced from galvanised steel and aluminum as well as color-finished steel and aluminum. Literature available. **Item 2510**

Moulding machine

American company offers under licence the Canadian manufacturing and marketing rights to its rotational moulding machine which can be used to produce tanks, drums, waste receptacles and other one-piece polyethylene products. It is claimed that this machine can be manufactured at a low cost and that skilled operators are not required. Licensor will provide technical training at his plant, and continuing advice on additional plastic items that the machine can produce as they are developed. Literature available. **Item 2511**

Air pollution control equipment

German firm seeks a Canadian licensee to manufacture and market its air pollution control equipment of the "wet scrubber" type. This equipment consists of a rotating drum which is immersed in a cleansing fluid. The drum is equipped with three perforated mantels. The chambers between the mantels are filled with floating rings and impact plates. This apparatus is suitable not only for separating solid particles such as dust from the air, but also for removing gaseous ingredients. Literature available. **Item 2512**

EDP terminal cassettes system

French firm offers under licence the Canadian production rights and the North, Central and South American marketing

rights to a new system of magnetic, electronic, data-processing terminal cassettes. This system consists of a keyboard, video screen, processor, cassette recorder-reader unit and a console containing electronic circuitry. This multi-purpose terminal is designed to collect and enter, to count, check, search and retrieve, to automatically acquire, display, receive, send and store data on magnetic tape contained in a cartridge. It is claimed to be less costly than other systems, to be reliable and to provide simple software for the user. Literature available. **Item 2513**

Milling machines

British firm offers to a Canadian manufacturer the Canadian production rights and marketing rights for Canada and possibly the United States to its line of milling equipment, including numerically controlled units. These machines are suited to a wide range of tool room and production applications, such as die and mould milling, copy, profile and continuous path milling. They are claimed to combine strength and rigidity with time-saving speed and precision. Average savings in milling costs with these machines are claimed to be 30 to 50 per cent. Literature available. **Item 2514**

Hydraulic vibratory equipment

British firm is seeking a licensing arrangement with a Canadian firm to manufacture and market in Canada and possibly the United States its hydraulic vibratory equipment. This system consists of a hydraulic drive unit equipped with a vibratory conveyor for conveying, sieving, dewatering and feeding. Features include positive action, both horizontally and on upward inclines, steady feed rate, infinitely variable feed control, lower power consumption and silent operation. Since no electronics are involved, equipment is unaffected by a wet or damp environment. Literature available. **Item 2515**

Automatic weighing machines

Czechoslovakian state trading corporation offers under licence the Canadian manufacturing and North American mar-

keting rights to an automatic weighing machine for bulk materials. These machines are equipped with devices for digital indication and recording of the weight and number of batches. All functions, including starting and stopping, can be remotely controlled. These machines are used in mills, malt houses, warehouses, food processing plants, oil refineries, etc. Literature available. **Item 2516**

Heating unit

American inventor offers the Canadian production and marketing rights to his heating unit which can be used instead of a conventional fireplace. This unit consists of a vertical cylinder in the shape of a hollow bowl with several clear or colored glass windows between which are located vertical elongated air intake openings. Air enters through the intakes, swirls around the box and rises in a spiral up through the flue. The fire box radiates heat and produces a beautiful lighting effect. It is claimed that the unit can be installed directly on wood floors or carpets. Literature available. **Item 2517**

Damper for pneumatic tools

Czechoslovakian state trading corporation seeks a Canadian licensee to produce and market a noise damper for pneumatic hand tools. To reduce the noise of pneumatic hammers, etc., an inside damping casing with a large number of holes and an outside damping casing with a protecting envelope are slipped onto the body of the hand tool. The casings are made of different materials, such as impregnated felt. Impacts of used compressed air are damped and smoothed in the inside and outside casings and the used air passes away through the bottom portion of the casing. It is claimed that the level of noise is reduced by as much as 10db. Literature available. **Item 2518**

Flowbox

British firm is seeking a licensing arrangement with a Canadian company to manufacture and market its flowbox for paper- and paperboard-making machines. It consists of a complete stock flow ap-

proach system with means for supplying a level flow of a fibrous suspension at relatively high consistencies in comparison with conventional practice. The machine involves simple and light structure engineering and is of clear design which minimizes pockets of stagnant material. Literature available. **Item 2519**

Self-locking nut

British firm offers under licence the Canadian production and marketing rights to its self-locking nut for use on railway tracks. Standard fishbolt nuts and ordinary hexagon nuts are converted into self-locking nuts by the addition of a nylon collar keyed into the body of the nut. Chief advantage claimed is the added safety factor since this nut will not vibrate loose. Conversion can be carried out on existing nuts in order to avoid the expense of buying new ones. Literature available. **Item 2520**

Wet sulphidizing at room temperature

Hungarian state trading corporation offers under licence the Canadian rights to a wet sulphidizing process for imparting wear resistance to heavy machine parts. The sulphide diffusion treatment is carried out at room temperature in a water bath and is claimed to have many advantages over existing processes, e.g., low equipment costs, absence of toxic vapors, and ability to treat large parts such as trunnions, piston rings and gears. This treatment is claimed to increase the abrasion resistance of the parts and to reduce friction. Literature available. **Item 2521**

Rust and scale remover

Hungarian state trading corporation offers under licence the Canadian production rights and the North American marketing rights to a chemical for removing scale and rust from metal surfaces. This chemical is claimed to be more efficient than competing products, to remove only the oxides and leave the bare metal unaffected, and to protect metallic surfaces for periods of four to six months. It can be used as a surface treatment preliminary to painting and as a derusting and descaling agent in closed system boilers and motor vehicle cooling systems. Literature available. **Item 2522**

Industrial mixing machine

American inventor offers the Canadian production and worldwide marketing rights to his self-discharging mixing machine. According to the inventor, this machine solves the problem of adherence of thick, non-flowing sticky and viscous products to the mixing chamber. A complete discharge of the mixed product is accomplished by a simple piston-in-cylinder movement of one of the end plates.

The other end plate is also capable of movement, although this is not required in many operations. The machine has not yet been commercially produced. Literature available. **Item 2523**

Automatic rotating division plate

French company wishes to negotiate a licence with a Canadian manufacturer for the production and marketing of its automatic rotating division plate. This system consists of an automatic-cycle division plate for feeding parts in different work units. The device can operate on a continuous or intermittent cycle. The motor, set some distance away, is sheltered from oil splashes or ejected materials and leaves the working area around the plate clear. The device has been marketed in three different models. Literature available. **Item 2524**

Magnetically driven TV antennas

American company offers a licensing arrangement to a Canadian manufacturer to produce and market its magnetically driven TV antenna. It consists of parasitic elements only and is driven magnetically by a section of transmission line. Models for both single-channel and broadband operation are available. The antenna is claimed to possess inherent advantages in design flexibility, performance and cost over others currently on the market. Material used is mainly aluminum tubing and sheet, and a few plastic moulded parts. Literature available. **Item 2525**

Carpet shearing machine

Dutch firm offers under licence the Canadian production and marketing rights to its three-cylinder carpet shearing machine which consists of three units with a working width of 18 feet. Each unit

is fitted with a complete cutting system with bed and brush on the pile side. The first unit has, in addition, a brush at the back. For transporting the cloth, the third unit is equipped with a pull roller and the first unit with a brake roller. The cutting system consists of a knife carrier equipped with tensioning gears in horizontal and vertical directions. The brushes and the cutting system are fitted with an exhaust system. Literature available. **Item 2526**

Battery holder

Canadian inventor is seeking a licensing arrangement with a Canadian firm to manufacture and market in the United States and Canada his battery holder or case with special switching system. The purpose of this invention is to reduce corrosion of the batteries and to offer greater versatility in its application. The case is ventilated and is equipped with retractable sections and specially made contact inserts. When the power is off, the batteries are physically separated, thus preventing chain action corrosion. This invention can be used as a hand light or as a battery holder for equipment. Literature available. **Item 2527**

Teeter-totter

American inventor offers under licence the Canadian manufacturing and marketing rights to its new concept of seesaw or teeter-totter. Since the unit sits directly on the ground, no balancing horse is required. While sitting on it, children do not sit opposite but are offset from each other; the unit pivots and "walks" as they push with their feet. The length and size may be varied for different age groups. Multiple units can be made for school playgrounds. Literature available. **Item 2528**

Livestock Project in Mauritania

The International Development Association (IDA), an affiliate of the World Bank, has approved a credit of \$4.15 million to help to finance a livestock project in the Republic of Mauritania.

The project was prepared with the assistance of the Food and Agriculture Organization and the World Bank cooperative program. It provides for reconstruction and repair of pastoral wells, training and equipment of well maintenance teams, exploratory drilling and subsequent well construction, establishment of an animal health program and establishment and maintenance of firebreaks.

The project will be implemented over a four-year period by the Ministries

of Rural Development and of Equipment under the over-all supervision of the Ministry of Planning. A project co-ordinating commission will advise the Minister for Rural Development on certain aspects of the wells and firebreaks components of the project.

The total cost of the project is estimated at \$6 million; \$3.7 million for investment costs and \$2.3 million for initial operating costs. The IDA credit will finance about 70 per cent of project costs, the remainder being financed by the Government.

The borrower is the Republic of Mauritania and the credit is interest free for 50 years, including a 10-year grace period.

Norwegian aluminum industry cuts production

Production of aluminum in Norway, the world's second biggest exporter of the metal, is to be cut by about 12 per cent on an annual basis. Aardal and Sunndal, the biggest plant in Europe with an annual production of 300,000 tons, is cutting its production by 12 per cent and other plants are planning similar cuts because of difficult international market conditions and the big stocks accumulated over the last months. Norway is the world's fourth largest producer of aluminum ore. The Norwegian production capacity has tripled in the last 10 years. Over 90 per cent of the Norwegian production of refined aluminum is exported—Oslo

Saudi Arabia plans 13 airports

The Saudi Arabian Civil Aviation authorities have announced that necessary funds have been made available for the development of Najran and Jizan airports. A public tender was issued in September for the execution of the projects under the Five Year Plan for the development of 13 airports in the Kingdom. These airports will be located in Jizan, Medina, Khamis Mashait, Taif, Najran, Tabouk, Wajh, Hail, Baisha, Badna, Joff, Qaseem and Saleel—Beirut

Germany, Morocco form tourist organization

An agreement has recently been signed creating the Société maroco-allemande de promotion touristique (SMAT) to carry out various tourist projects in Morocco, the first being the construction of a hotel in Agadir with capacity for 600 to 800 beds. This company has been formed by the organization DEG (Deutsche Entwicklungsgesellschaft) in collaboration with the firm Steigenberger, which has international experience in the hotel field, and by Caisse de Dépôts et de gestion and the Moroccan National Tourist Office. This is believed to be only the start of intensive tourist co-operation between Germany and Morocco—Madrid

Spain to build fourth nuclear plant

It has been announced that, under Spain's third Development Plan, (1972-75), the firm Electra de Viesgo will construct a 750 megawatt nuclear power plant in the northern province of Santander. This will be Spain's fourth nuclear power plant. It will be similar to the plant at Santa Maria de Garona in Burgos province. The other two plants are located at Zorita de los Canes in the Province of Guadalajara and Vandellos in Tarragona, and are already operating. It is calculated that by 1973, 16.9 per cent of electricity produced in Spain will be from nuclear plants, and by 1983 53.9 per cent—Madrid

Goodyear builds in Morocco

Goodyear Tire and Rubber Co. is building a tire factory near Casablanca which is scheduled to begin production some time in 1972. Initial investment totals \$14 million, of which 65 per cent will be contributed by Goodyear and the rest by a Moroccan group. The factory will produce tires for automobiles and for industrial and agricultural vehicles, starting with 225,000 units a year—Madrid

Mexican chlorine and caustic soda production to increase

Guanos y Fertilizantes de México and Krebs of France are constructing a mercury cell electrolysis plant. The plant will have an annual capacity of 18,000 metric tons of chlorine and 20,500 metric tons of caustic soda—Mexico City

Swiss production of aluminum

In 1970 the three Swiss aluminum works produced 91,500 metric tons of raw aluminum. This was 14,000 tons more than in 1969. During the same period Switzerland imported 22,119 tons of raw aluminum and scrap, mainly from Norway, Iceland, the United States, Poland and Britain. Canada supplied only 18 tons. Swiss exports amounted to 14,442 tons. The most important customer was West Germany, followed by Italy—Berne

Jetstream aircraft finds a builder

Scottish Aviation Ltd., Prestwick, is to build the Jetstream, the 18-seater "flying office" planned by Handley Page before it went into liquidation over a year ago. Scottish Aviation has formed a new company, Scottish Jetstream Ltd., to develop the aircraft—Glasgow

Mexican anti-pollution process used in U.S.

Paper manufacturers in the United States are using a process developed in Mexico to reclaim industrial wastes and cut water and ambient contamination by cellulose factories. The Columbia Pulp and Paper Company and Citizens Bank of Mississippi were recently authorized by contract to use the process and to extend it to any other firm wishing to use it. The technique, which involves the use of soda, was developed by Fabricas de Papel de Loreto y Pena Pobre, S.A., one of Mexico's leading paper manufacturers, after 15 years of research—Mexico City

Middle East oil output increases

Crude oil production in the Middle East averaged 16,093,000 barrels a day during the first six months of 1971, an increase of 20.7 per cent over the correspond-

ing period of 1970. The leading growth performers were Saudi Arabia, up 27.6 per cent to 4,631,000 barrels a day, Iran, up 21.1 per cent to 4,522,000, and Abu Dhabi, up 48.4 per cent to 905,000 barrels a day. Saudi Arabia regained its position as the biggest oil producer in the area, with Iran falling back into second place. Production in North Africa, on the other hand, fell by more than 15 per cent compared with the first half of 1970, owing mainly to continued output restrictions in Libya and the results of the oil dispute between France and Algeria. Crude oil output in the 11 member states of the Organization of Petroleum Exporting Countries rose by 11.4 per cent to an aggregate of 25,352,000 barrels a day—Beirut

Iraqi-Belgian oil

The Iraq National Oil Company (INOC) is studying possible participation with Belgian interests in a \$100 million joint oil refinery venture to be constructed in Liege, Belgium. The refinery would have a capacity of between three and five million tons a year. INOC would put up its share of the cost of the project in the form of crude oil supplies from the state-operated oilfields which are due to start production in 1972—Beirut

British Forestry heading for Scotland

National headquarters for the Forestry Commission in Britain will be moved to Edinburgh, Scotland, by 1975. The headquarters are now in London, Edinburgh and

Basingstoke. Of about three million acres of land held by the Commission, 1.78 million are in Scotland, 760,000 in England and 390,000 in Wales. With the rate of new planting in Scotland—about six times that of England and seven times that of Wales—the Scottish forests are going to be of even greater commercial value to the Commission in future—Glasgow

Mexico to build steel complex

Las Truchas, Michoacan, has been selected as the site for a huge steel complex. The first production units will be built between 1972 and 1975, and will have an annual production of 1.5 million tons of steel. Work will begin on the second stage in 1976 or 1977, and will increase capacity to an estimated three million tons a year. With Las Truchas in full operation, Mexico's domestic demand for steel will be covered—Mexico City

Retail sales scarcely affected by SST cancellation

The State of Washington's economic "cool off" which resulted from cancellation of the Boeing SST project has been apparent in a number of areas, but has affected retail sales to only a small degree. Figures for the first half of 1971 show that department store sales have actually risen—as much as 14 per cent—in the less populated areas. The Seattle-Everett area showed a drop of only 2 per cent. Tacoma, the other major population center, recorded no change over last year's sales—Seattle

Trade Commissioners on Tour

In Territory

Businessmen who would like Trade Commissioners to undertake assignments for them should write to the post as soon as possible.

Bolivia

Trade Commissioners from the Lima, Peru, office visit Bolivia approximately every two months.

Bulgaria, Hungary, Romania

Trade Commissioners in the Vienna, Austria, office make frequent visits to these countries.

Cyprus

An officer from the Tel Aviv, Israel, office visits Cyprus approximately every two months.

Dominican Republic, Haiti, Virgin Islands

Trade Commissioners from San Juan regularly visit the Dominican Republic, Haiti and the Virgin Islands.

Ecuador

Officers of the Bogota, Colombia, office visit Ecuador approximately every two months.

Finland

A Trade Commissioner from the Stockholm, Sweden, office visits Helsinki once a month for about a week, except during July and August.

Guyana

G. H. Musgrove, Commercial Secretary in Port-of-Spain, Trinidad, will visit Guyana February 14-17.

Libya, Sudan

The Trade Commissioner in Cairo, the Arab Republic of Egypt, visits Libya approximately every two months, and the Sudan every six months.

South Korea

Trade Commissioners from the Tokyo, Japan, office visit the Republic of Korea (South Korea) approximately every two months for a week.

Surinam

G. H. Musgrove, Commercial Secretary in Port-of-Spain, Trinidad, will visit Surinam February 14-17.

Turkey

Trade Commissioners in Ankara visit Istanbul frequently.

Foreign Tariffs and Trade Regulations

Colombia

On November 5, 1971, the Colombian Government introduced Decree No. 2153 bringing into force the Andean Pact regulations for the treatment of foreign investment, trade marks, patents licences and royalties. English copies of the decree may be obtained from the Latin America Division, Office of Area Relations, Department of Industry, Trade and Commerce, Ottawa K1A 0H5.

Ghana

The Ghana Commercial and Industrial Bulletin of September 10, 1971, advises of variations in rates of surcharges applicable to a large number of imports into Ghana.

These surcharges range from 5 per cent to 150 per cent on a list of goods imported under Open General Licences. In addition, the bulletin lists a number of items that are subject to a 5 per cent surcharge when imported under Specific Licences.

Further information is available from the Africa Division, Office of Area Relations, Department of Industry, Trade and Commerce, Ottawa K1A 0H5.

Guatemala

On August 25 the Government of Guatemala passed Decree No. 78-71 regulating the activities of local agents/distributors and their relations with foreign companies. The decree deals primarily with the necessity of providing compensation to the local agent if the agency agreement is terminated without just cause.

Copies of unofficial translations of Decree No. 78-71, published in the *Official Gazette of Guatemala* of October 1, 1971, are available from the Latin America Division, Office of Area Relations, Department of Industry, Trade and Commerce, Ottawa K1A 0H5.

Ireland

The annual quantitative restriction on the import of raw tomatoes which was imposed on April 20, 1971, has been removed, effective November 21, 1971. On and from that date licences under the Tomatoes (Regulation of Import) Order, 1948, will not be required for the import of raw tomatoes.

Licences under the Colorado Beetle Orders 1945 and 1962, and the Foot and Mouth Disease (Importation of Plants) Order, 1952 and 1962, will still be required for individual consignments of imported tomatoes.

Peru

Decree Law No. 18999, published in the *Peruvian Official Gazette* on October 20, 1971, sets out the procedure for all companies in Peru with foreign capital participation for filing statements with the correspond-

ing government agency, indicating the amount of foreign investment and reinvestment, as well as trademark, patent and licensing agreements with foreign firms.

The companies are also directed to sign agreements with the Government providing for their transformation into national or joint stock companies. The decree law also makes it compulsory for the companies to sell a portion of the stock to the labor communities on credit terms.

The regulations are in keeping with decisions No. 24 and No. 37 as approved by the Cartagena Agreement Commission.

Copies of Decree Law No. 18999 in Spanish are available from the Latin America Division, Office of Area Relations, Department of Industry, Trade and Commerce, Ottawa K1A 0H5.

South Africa

We have been notified that, effective November 24, 1971, South Africa has intensified significantly its import control system. The intensification was introduced as a temporary measure to combat balance of payments problems and will be reviewed in May 1972.

Main elements in the intensification include:

1. All unused portions of 1971 import licences reduced by 50 per cent. Goods in transit will not be affected.
2. The period for use of the 1971 licences is extended to March 31, 1972.
3. The existing list of goods for which an import licence is not required has been reduced.
4. Import permits for 1972 will be valid from March 1, 1972, and the 1972 permits for goods subject to global quota will be based on a percentage of actual imports during the year 1969.

Further information is available from the Africa Division, Office of Area Relations, Department of Industry, Trade and Commerce, Ottawa, or the Canadian Government Trade and Commerce posts in Johannesburg and Cape Town, South Africa.

Trinidad and Tobago

A notice by the Ministry of Industry and Commerce, published in the *Trinidad and Tobago Gazette* of October 21, 1971, adds the following items to the Negative List of goods which require a specific licence before import:

Peanuts, salted and roasted.

Particle board, plywood fiberboard, wall elements for prefabricated buildings, prefabricated doors, semi-finished furniture parts, cupboards, shelving.

Hat bodies and hoods of wool felt and fur felt.

Hat bodies and hoods not elsewhere specified.

Foreign Exchange Rates

These nominal quotations may help exporters in checking prices, but they should consult their banks before making any firm commitments. When more than one rate is shown, the one to be used depends on the commodity traded. Information on the rate for any specific commodity may be obtained from the Office of Area

Relations, Department of Industry, Trade and Commerce, Ottawa.

The mid market rates only are quoted, except when buying and selling rates are specified. The buying rate is that at which banks purchase exchange from exporters; the selling rate is that at which banks sell exchange to importers.

Rates used exclusively in non-merchandise trading are *not* included in this table.

For conversion of column one to the U.S. dollar equivalent multiply by .99.

To convert column two, divide by .99.

Country and Currency	Value of		Country and Currency	Value of	
	foreign currency unit in Canadian dollars at December 2	Canadian dollar in foreign currency units		foreign currency unit in Canadian dollars at December 2	Canadian dollar in foreign currency units
Algeria Dinar	.2093	4.78	Ecuador Sucre (official)	.0401	24.94
Arab Republic of Egypt Pound (official)	2.3058	.43	El Salvador Colon	.4010	2.49
Argentina Peso (free)	.2007	4.98	Fiji Dollar	1.1573	.86
Australia Dollar	1.1664	.86	Finland Markka	.2387	4.19
Austria Schilling	.0417	23.98	France, Monaco, etc. ¹ Franc	.1819	5.50
Bahamas Dollar	1.0025	.99	French Pacific ² Franc	.0100	100.00
Belgium and Luxembourg Franc	.0219	45.66	Franco-African Republics ³ Franc	.0036	277.77
Bermuda Dollar	1.0397	.96	Germany D Mark	.3049	3.28
Bolivia Peso	.0802	12.47	Ghana New Cedi	.9825	1.02
Brazil Cruzeiro (official free)	.1785	5.60	Greece Drachma	.0334	29.94
Britain Pound	2.4994	.40	Guatemala Quetzal	1.0025	.99
British Honduras Dollar	.6078	1.64	Guyana Dollar	.5136	1.95
Burma Kyat	.2105	4.75	Haiti Gourde	.2005	4.99
Ceylon Rupee	.1684	5.94	Honduras Lempira	.5013	1.99
Chile Escudo (bank rate) (free)	.0820 .0358	12.20 27.93	Hong Kong Dollar	.1654	6.05
China, People's Republic of Renminbi	.4188	2.39	Hungary Forint (official)	.0921	10.85
Colombia Peso (fixed)	.0483	20.70	Iceland Krona (official)	.0114	87.72
Costa Rica Colon	.1220	8.20	India Rupee	.1333	7.50
Czechoslovakia Koruna	.1395	7.17	Indonesia ⁴ Rupiah	.0024	410.00
Denmark Krone	.1389	7.20	Iran Rial	.0134	74.63
Dominican Republic Peso	1.0025	.99	Iraq Dinar	2.8070	.36

Country and Currency	Value of		Country and Currency	Value of	
	foreign currency unit in Canadian dollars at December 2	Canadian dollar in foreign currency units		foreign currency unit in Canadian dollars at December 2	Canadian dollar in foreign currency units
Ireland Pound	2.4994	.40	Peru Sol (free)	.0231	43.29
Israel Pound	.2387	4.19	Philippines ⁶ Peso (free)	.1561	6.41
Italy Lira	.0016	625.05	Poland Zloty (fixed basic rate)	.2577	3.88
Jamaica Dollar	1.2497	.80	Portugal & Colonies ⁷ Escudo	.0349	28.65
Japan Yen	.0030	333.33	Saudi Arabia Riyal	.2273	4.40
Kenya ⁵ Shilling	.1441	6.94	Sierra Leone Leone	1.2371	.81
Korea, Republic of Won	.0027	370.37	Singapore Dollar	.3358	2.98
Lebanon Pound (free)	.3178	3.15	South Africa Rand	1.4599	.68
Libya Dinar	2.9467	.34	Spain & Dependencies Peseta	.0146	68.49
Malawi Kwacha	1.2494	.80	Sweden Krona	.2036	4.91
Malaysia Dollar	.3275	3.05	Switzerland Franc	.2549	3.92
Mexico Peso	.0802	12.47	Syria Pound (free)	.2711	3.69
Morocco Dirham	.2014	4.97	Thailand Baht (free)	.0482	20.75
Netherlands Florin	.3033	3.30	Trinidad & Tobago ⁸ Dollar	.5013	1.99
Netherlands Antilles Florin	.5316	1.88	Tunisia Dinar	1.9096	.52
New Zealand Dollar	1.1697	.85	Turkey Lira	.0668	14.97
Nicaragua Cordoba	.1432	6.98	United States Dollar	1.0025	.99
Nigeria Pound	2.8835	.35	Uruguay Peso (free)	.0027	370.37
Norway Krone	.1470	6.80	Venezuela Bolivar (official free)	.2232	4.48
Pakistan Rupee	.2105	4.75	Yugoslavia Dinar (official)	.0668	14.97
Panama Balboa	1.0025	.99	Zaire, Republic of ⁹ Zaire	2.054	.49
Paraguay Guarani (free)	.0080	125.00	Zambia Kwacha	1.4576	.69

1. Franc is also used in French Guiana, Guadeloupe and Martinique.

2. New Caledonia, New Hebrides, French Polynesia.

3. Chad, Central African Republic, Congo (Brazzaville), Dahomey, Gabon, Ivory Coast, Islamic Republic of Mauretania, Niger, Senegal, Upper Volta, Cameroon, Togoland, and Malagasy. Also Reunion, Comoro Islands, St. Pierre and Miquelon.

4. Exchange rate at August 1971.

5. Rate also applies to Tanzania and Uganda.

6. Exchange rate in Philippines on floating basis with daily quotations by banks.

7. Approximately same for Portuguese territories in Africa.

8. Also used in Barbados, Leeward and Windward Islands.

9. Formerly Congo (Kinshasa).

A Desk for the Doctor

New medical clinics are springing up fast in the Western United States and doctors are seeking prestige office furniture for them.

This article tells you how to get a piece of the action.

WAYNE T. MORDEN
Commercial Officer, San Francisco

Canadian exports of office furniture to the Western United States and the Rocky Mountain area tripled in total dollar value between January 1968 and December 1970, despite the downward economic trend experienced in the United States during this period. Total Canadian exports to this area were: 1968, \$495 million; 1969, \$437 million; 1970, \$466 million. Sales of office furniture in the same years, however, totalled \$106,632, \$161,633 and \$364,830.

The boom in high-rise office construction experienced from 1967 to 1971 on the United States Pacific Coast is levelling off and can be expected to decrease in the next few years. This can be expected to affect office furniture sales.

A case in point is San Francisco, California, the so-called Wall Street of the West. Of the 12 high-rise commercial buildings (30 storeys and over) which were scheduled for completion by 1972, all but three are now completed. Planning, however, had been made about five years in advance and at the onset of the recession in 1967 further planning and construction was either abandoned or deferred. So, in spite of a favorable three-year increase in our exports, a levelling-off can be anticipated for the next three years. Furniture manufacturers, therefore, should be planning their market activities to lessen the effects of this anticipated drop, and one promising alternative is described in the next few paragraphs.

A survey of leading retail furniture outlets and interior design people has revealed some interesting, and perhaps crucial, comments which manufacturers should be aware of. Designs that have been most successful in the past have capitalized on the market's "style consciousness." Designs that have shunned innovation and followed the conservative styling of

ten years ago have not enjoyed the growth rates that the highly competitive "contemporary lines" have enjoyed. Price also will be more of a consideration to the American buyer than in the past. Therefore, because Canadian goods rarely have a price advantage over United States goods, Canadian manufacturers should emphasize quality and craftsmanship in order to capitalize on our excellent reputation for fine wooden furniture, particularly for cabinetry.

"All well and good", you say, "so I'll watch my price structures, make sure that my drawers are glued tightly and that the stain is even. But if there is a drop in the market, who is going to buy?"



The answer may well lie in the medical profession. Clinics with facilities for 10 or more doctors are very popular in the western states, and the construction people have indicated that their hands are full for the immediate future in the attempt to meet this demand.

The general building trend of new clinics logically follows the growth patterns of the suburbs. Relatively few new facilities are anticipated in the urban areas and as families continue to move out of the cities, the doctors follow.

Doctors are a breed of men entirely unto themselves and the man, as an individual, should be considered

when designing the type of furniture he desires for his office. A large desk with a fine finish and a look that confirms his patient's viewpoint that the man sitting behind that desk deserves respect and confidence is usually what he wants.

Clean, crisp, comfortable waiting rooms, with more of a living room than a hospital look, seem to be the popular style. Manufacturers who are now exporting successfully to the Pacific states may well wish to re-evaluate their lines in light of this apparent trend.

Clinics which share common waiting areas lean toward the large contract design firms that carry diverse ranges of essentially non-competing lines. The individual doctors, on the other hand, are more likely to patronize interior designers who use the showroom facilities of manufacturers' representatives. Those manufacturers enjoying the highest volume market through representatives, independent salesmen who carry several lines. Leading representatives in the Icehouse, San Francisco's interior design showplace, report that their largest volume is done in the high-end wooden styles.

Although architects are reluctant to make public too far in advance their plans for proposed construction, a list of architects specializing in medical facilities is available upon request from the Commercial Division of the San Francisco office of the Canadian Consulate General, One Maritime Plaza, San Francisco, California 94111, for any manufacturer wishing to extend his own market research.

There certainly appears to be a growing market here among members of the medical profession and Canadian manufacturers should investigate it, particularly in light of the slow-down in high-rise office building construction.



Show of the Month

The Forest Industries Equipment Exhibition, held every two years in Ottawa, is now one of the biggest shows of its kind in North America and is developing into the biggest exhibition anywhere in the world featuring logging and sawmill equipment. Held last year in the latter part of September, it attracted about 160 exhibitors, 60 per cent of whom were Canadian firms and the rest from the United States and other parts of the world.

Results of a trade exhibition of this kind are not readily assessable because on-site sales of equipment are not necessarily looked for by exhibitors. Orders may come several months later when companies make up their budgets for the coming year. Although the United States market was still good, despite the surtax, organizers of the exhibition—Southex (1970) Limited—received the impression that the larger orders, at least for Canadian equipment, were being placed by firms outside the North American continent in countries such as the Philippines and within Central and Latin America.

This last show was about 10 per cent larger than the previous one in 1969, with attendance around the 4,400 mark. Visitors came from nearly 30 countries, including a delegation from the U.S.S.R., another from Southeast Asia and one from Latin America. As further proof of the prominence of this exhibition and of Canada's world-wide reputation for forestry expertise, requests for further information on products shown are still coming from many countries, requests principally from those who were unable to attend personally. Possibly they will come to the next F.I.E.E., which will be held in Ottawa in 1973.

Members of the U.S.S.R. mission share a joke with Mr. Pepin. Left to right are J. Pronin, Deputy Minister of the Pulp and Paper Industry; Mr. Pepin; Mrs. R. Kopeleva, Expert in the State Committee for Science and Technology; and Mrs. O. Vyatkina, Expert of the Ministry of the Pulp and Paper Industry.



Shown against a backdrop of old-time logging equipment are members of the Forestry Equipment Mission from Southeast Asia. Left to right are Nicasio I. Alcantara (Philippines), James Suliman (Indonesia), Mrs. Sumara Adhyatman (Indonesia), German B. Aranez (Philippines), and Ralph F. Britto, who represented Malaysia.



Holding aloft two good-sized steak boards (why not?) just cut from the stump, the Hon. Jean-Luc Pepin, Minister of Industry, Trade and Commerce, shows his enthusiasm for the success of the Forest Industries Equipment Exhibition in Ottawa.



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