

U. S. DEPARTMENT OF COMMERCE
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BUREAU OF FOREIGN AND DOMESTIC COMMERCE
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Trade Promotion Series—No. 143

EUROPEAN SALES AREAS



UNITED STATES
GOVERNMENT PRINTING OFFICE
WASHINGTON : 1933

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FOREWORD

This bulletin is confined strictly to a discussion of sales areas in Europe; in no sense is it a market analysis. It concerns, in other words, the location of agencies rather than the sale of goods, although some information of a general economic character has been included.

Any publication of this nature must obviously be based upon the general practice in normal times. To this, of course, there are numerous exceptions, since an agency arrangement satisfactory for one line may be entirely unsuited to the handling of another or may be temporarily inadvisable on account of prevailing trade restrictions or other circumstances. The advice given, therefore, must be taken as applying in general and should not be acted upon without a thorough investigation of conditions as affecting the distribution of individual products. In such an investigation and in the selection of suitable agents, the Bureau of Foreign and Domestic Commerce, especially through its offices in Europe, is in a position to be of great service to American exporters.

This publication has been prepared by R. M. Stephenson, chief of the European section of the Division of Regional Information of the bureau, largely from reports received from the American commercial attaches in the various European offices. Use has also been made, as noted, of reports from consular officers in certain countries. Statistical material included has been compiled from official foreign sources.

The assembly of this information, it is hoped, will be found useful to export managers who are contemplating the revision or extension of their European organizations.

FREDERICK M. FEIKER, *Director,*
Bureau of Foreign and Domestic Commerce.

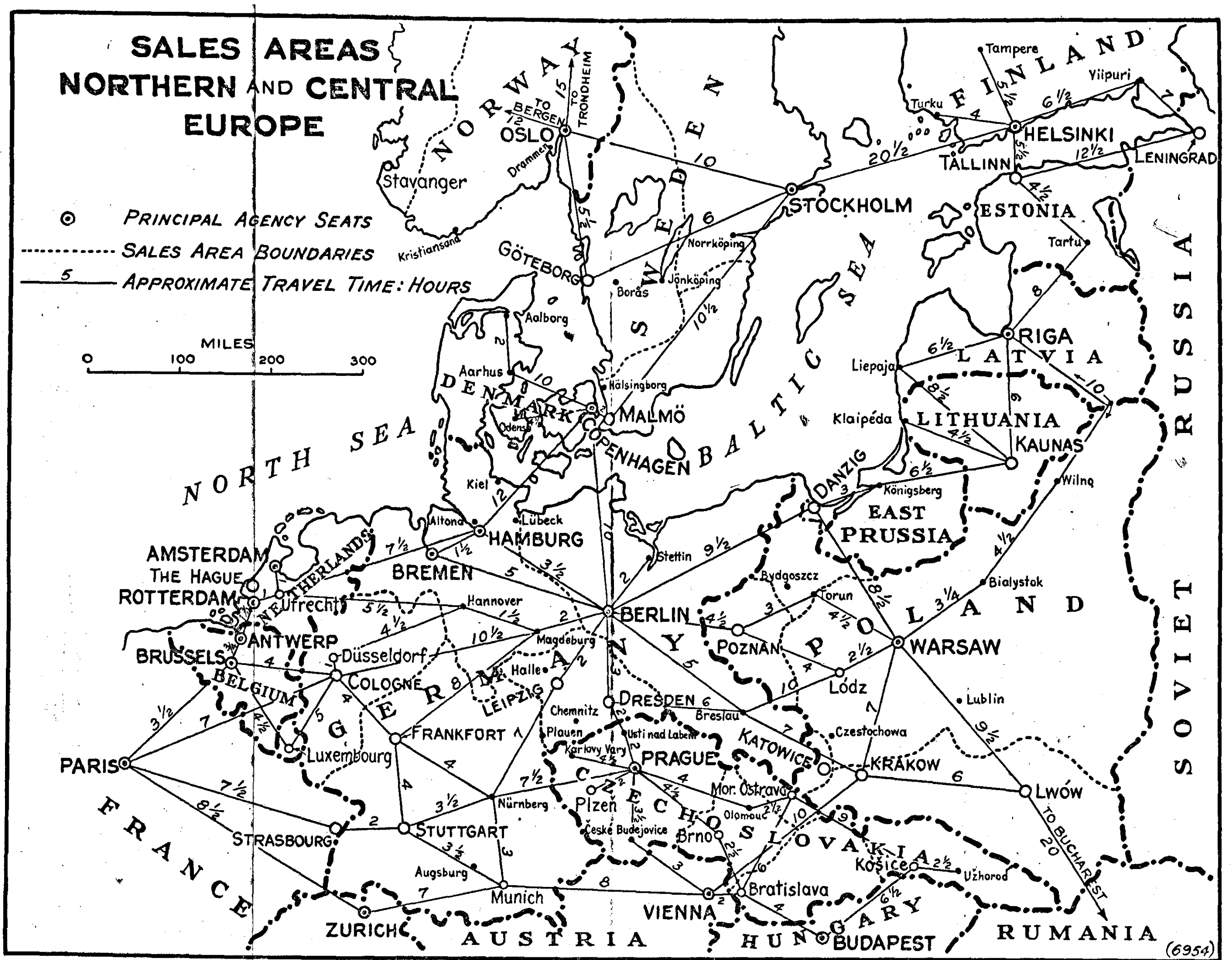
JANUARY, 1933.

SALES AREAS NORTHERN AND CENTRAL EUROPE

⊙ PRINCIPAL AGENCY SEATS

----- SALES AREA BOUNDARIES

5 — APPROXIMATE TRAVEL TIME: HOURS



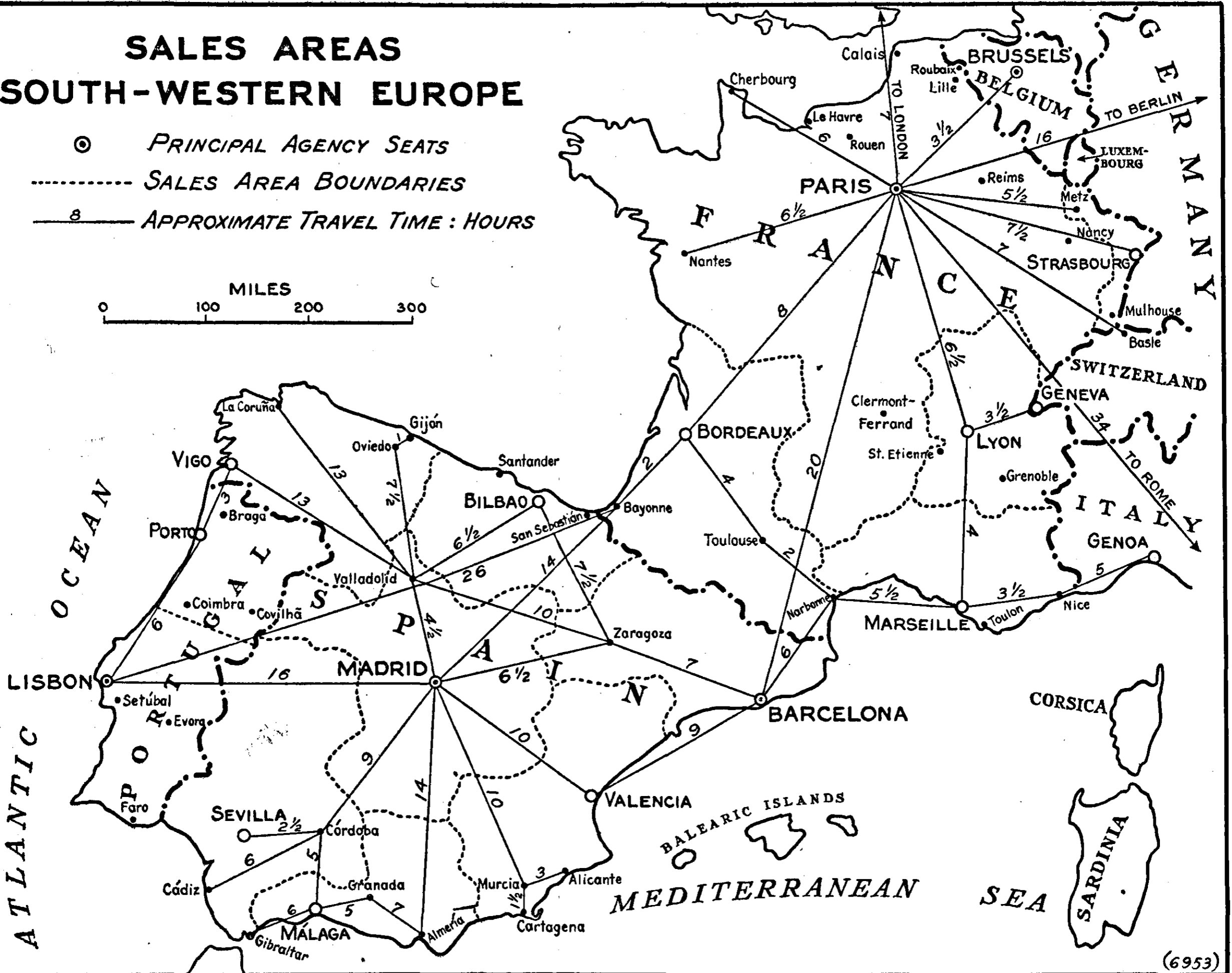


SALES AREAS SOUTH-WESTERN EUROPE

⊙ PRINCIPAL AGENCY SEATS

----- SALES AREA BOUNDARIES

8 — APPROXIMATE TRAVEL TIME: HOURS



(6953)

EUROPEAN SALES AREAS

ALBANIA

From reports by K. L. Rankin, Commercial Attaché, Athens, and E. W. A. Hoffmann, Vice Consul, Tirana

Population: 1,003,000. Area: 10,632 square miles. Chief cities: Tirana (Tiranë), 31,000; Shkodër (Scutari), 29,000; Korçe (Coriza), 23,000; Elbasan, 14,000; Gjinokastër (Argirocastro), 11,000; Durrës (Durazzo), 10,000; Vlorë (Valona), 9,000; Sarandë (Santi Quaranta), 2,000.

Very few Albanian importers are equipped to handle wholesale distribution outside of their own immediate vicinities, and great care should be exercised in granting an exclusive agency. Nevertheless, direct agencies in Albania are preferable when a good connection can be made. Buying is often done piecemeal from merchants in neighboring countries, who regularly send commercial travelers with full lines of samples to the principal Albanian towns. This method seems suited to the present state of the market, except in the case of commodities in which a sizable turnover is possible. Albania may in some cases be included in the territory of an agent in a neighboring country, but it should be first be determined with certainty that he has connections in the chief towns.

Albania is almost exclusively dependent on agriculture, the principal products being cereals (especially corn), dairy products, olives, tobacco, and livestock. The country is reputedly rich in minerals, which, however, are largely undeveloped. Forest and waterpower resources are also considerable. Manufacturing is practically limited to a few small industries (alcohol, beer, cement, cigarettes, flour, etc.), supplying the domestic market.

There are no railways in Albania, communication being by sea, road (automobiles and trucks), or air.

Tirana, the capital, and Durrës (Durazzo), the principal port, and their near-by communities constitute the chief market area of Albania. Shkodër (Scutari) is the center for the northern part of the country and for trade with Yugoslavia; Korçe (Coriza) handles most of the trade with Greece and foreign trade through Saloniki; the two ports Vlorë (Valona) and Sarandë (Santi Quaranta) with Gjinokastër (Argirocastro) take care of the trade in the southwest.

Commercial languages.—Italian, French, and English, in this order are used for commercial purposes.

American consular office.—Vice consulate, Tirana. (Albania is under the jurisdiction of the American commercial attaché at Athens.)

AUSTRIA

Population: 6,713,000. Area: 32,377 square miles. Chief cities: Vienna (Wien), 1,866,000; Graz, 153,000; Linz, 102,000; Innsbruck, 56,500; Salzburg, 38,000.

A general agent in Vienna is sufficient to cover Austria, although subagents in the cities mentioned above may be advisable, at the discretion of the general agent. For some lines, Austria may be satisfactorily included within the territory of a general agent in Berlin, but an attempt to cover the country from any other foreign center is less likely to be successful. In normal times Vienna to a considerable extent still serves as a distributing point for the Danubian and Balkan countries, but on account of the opposition to such indirect representation likely to be met, the assignment of other countries to a Vienna agent should be undertaken cautiously and only after thorough investigation. When not offset by other considerations, the greater distributing and banking facilities normally offered by Vienna are an advantage in selling to this section of Europe.

Of the total population of Austria, 30 per cent is dependent on agriculture and forestry, 33 per cent on industry (including mining), and 16 per cent on trade and transportation. On the basis of population employed, Vienna has 37 per cent of Austrian industry and 50 per cent of trade and transportation. The Vorarlberg in the extreme west is the only other region in which the industrial interest predominates over agriculture.

Commercial language.—German is spoken by 96 per cent of the population of Austria and should be used, if possible, in all dealings with Austrian firms. Familiarity with English has recently increased, and it should be employed in preference to a third language.

American commercial and consular offices.—Commercial attaché, Vienna; consul general, Vienna.

AZORES AND MADEIRA ISLANDS

Population: Azores, 254,000; Madeira, 208,000. Area: Azores, 924 square miles; Madeira, 250 square miles. Principle cities: Azores—Ponta Delgada (St. Michael's), 47,000; Horta (Fayal); Angra (Terceira); Madeira—Funchal, 52,000.

Although the Azores and Madeira are, for administrative purposes, regarded as integral parts of Portugal, they are commercially largely independent of the mainland and are best covered by agencies at Ponta Delgada and Funchal, respectively.

The islands are largely agricultural, with some minor industrial development. Principal products are foodstuffs (wine, milling, beet sugar, etc.), textiles (especially cotton embroidery), and ship supplies. The tourist trade is an important consideration for all the islands.

Commercial language.—The use of Portuguese is preferable, but English is generally understood.

American consular offices.—Consulates: Ponta Delgada, St. Michael's, Azores; Funchal, Madeira.

BALTIC STATES

ESTONIA, LATVIA, LITHUANIA

Estonia: Population, 1,115,000; area, 18,360 square miles. Latvia: Population, 1,900,000; area, 25,400 square miles. Lithuania: Population 2,340,000; area, 21,490 square miles.

The three Baltic Republics may be treated as a single sales area, in which case a general agent can be most conveniently located at Riga, Latvia, probably with subagents at Tallinn, Estonia, and Kaunas (Kovno), Lithuania. In case independent agencies are established in all three countries, the cities mentioned would be the logical centers.

In many instances it has been found more practical to cover the Baltic states indirectly through an agent in one of the north European free ports, as Hamburg, Copenhagen, or Stockholm. On account of the limitations of the market, orders are usually small, and it is, therefore, frequently more economical to deal through an agent elsewhere who can take larger shipments and who is thoroughly familiar with the market. This relieves the American exporter of the trouble of handling small lots and of the responsibility for collection of small accounts.

Agriculture is the leading pursuit in the Baltic states, accounting for about 60 per cent of the population in Estonia and Latvia and for 80 per cent in Lithuania. Latvia is the most developed industrially, and Lithuania the least. Lumbering and woodworking, paper and pulp, and linseed and flax are leading industries in all these countries. In Estonia oil shale and cement are important, and in Latvia plywood and rubber.

The principal cities and their populations are as follows: Estonia: Tallinn (Reval), 130,000; Tartu (Dorpat), 67,000; Narva, 27,000. Latvia: Riga, 378,000; Liepaja (Libau), 57,000; Ventspils (Windau), 17,000. Lithuania: Kaunas (Kovno), 98,000; Klaipėda (Memel), 37,000.

Commercial language.—Correspondence should be in German or Russian; English is rarely understood.

American commercial and consular offices.—Commercial attaché: Riga, Latvia. Consuls: Riga, Latvia; Tallinn, Estonia; Kaunas (Kovno), Lithuania.

BELGIUM AND LUXEMBOURG

From report by Commercial Attaché E. C. Miller, Brussels

Population: Belgium, 8,130,000; Luxembourg, 301,000. Area: Belgium, 11,754 square miles; Luxembourg, 999 square miles. Principal cities: Brussels (Bruxelles), 840,000; Antwerp (Anvers), 425,000; Liège, 253,000; Ghent, 217,000; Luxembourg, 52,000.

Belgium and Luxembourg, though politically independent, are united for customs purposes and may be considered a single sales area. It is not generally advisable to include this area within the territory of a general agent in another country (as France), nor can neighboring countries be advantageously covered by an agent in Belgium, except in so far as Antwerp may be used as a distributing center.

The area is densely populated and highly industrialized. Of the total gainfully employed population of Belgium (3,205,000), 19 per cent are engaged in agriculture, 6.5 per cent in mining and quarrying, 40 per cent in industry, 18 per cent in trade and transportation, and 3.5 per cent in professions. Belgium has the highest railway mileage in proportion to its area of any country in the world, and this service is supplemented by a network of waterways. The leading industries of the principal centers are as follows: Brussels—textiles, leather, steel, machinery, glass, china, etc.; Antwerp—shipyards, engineering, diamond cutting, cement, bricks, paper, textiles, etc.; Liège, Charleroi, and Mons—coal, iron and steel, glass; Ghent—textiles, chemicals, machinery; Luxembourg, iron and steel, leather, cement.

A general agent for the Belgium-Luxembourg area should be located at either Brussels or Antwerp, with, in most cases, a subagent at the other city. For most lines Brussels is probably the more satisfactory center, but for bulk foodstuffs and certain other lines, particularly of heavy goods where transshipment to other countries is contemplated, Antwerp is the more advantageous headquarters. As a warehousing and distributing point for central western Europe, Antwerp, because of its excellent port, rail, and inland-waterway facilities, is admirably situated. It does not have a free-port area but offers similar facilities through bonded warehouses. Many of the supplies for establishments in the Belgian Congo are purchased through headquarters at Brussels.

It may be advisable to appoint local agents in such cities as Liège, Ghent, and Luxembourg, but their selection should be left to the general agent. Distances are so small and communication so easy that the area can readily be covered for most lines by agents in Brussels and Antwerp.

Commercial languages.—French and Flemish are official languages in Belgium, but for commercial purposes the division of the country into Flemish and Walloon (French-speaking) districts may be disregarded. Correspondence should preferably be in French, though English is very widely spoken and understood.

American commercial and consular offices.—Commercial attaché, Brussels; consul general, Antwerp; consuls, Brussels and Ghent.

BULGARIA

From report by Consul Maynard B. Barnes, Sofia

Population: 6,006,000. Area: 39,850 square miles. Chief cities: Sofia (Sofiya), 280,000; Plovdiv (Philippopolis), 120,000; Varna, 65,000; Ruschuk (Ruse), 50,000; Burgas, 40,000; Sliven, 32,000.

The small Bulgarian market can be covered by an agent at Sofia, with connections in the other cities mentioned above.

About 80 per cent of the population is engaged in agriculture (cereals, tobacco, fruits, roses, etc.). The mineral resources of the country are coal and small deposits of copper, lead, and zinc. Industrial production is almost exclusively for domestic consumption (foodstuffs, textiles, metal working, paper, ceramics, chemicals, leather, tobacco, etc.).

Sofia, the capital, is the administrative, commercial, and financial center of Bulgaria. It serves the whole of the country, particularly the western section. Local industries include foodstuffs, textiles, leather, ceramics, metal working.

Plovdiv is the chief distributing center for southern Bulgaria. Local industries include foodstuffs, leather, ceramics, sugar refining.

Burgas is the leading port and the center for an agricultural and coal-mining district. Varna ranks after Burgas as a port; it has a considerable resort trade and an important cotton-textile industry. Ruschuk is a Danube port; its industries include sugar refining, leather, chemicals, and metal working. Sliven is an industrial center producing chiefly woolen textiles.

Commercial languages.—French or German is commonly used for commercial purposes, with English less frequently understood.

American consular office.—Consul, Sofia.

CANARY ISLANDS

Population: 523,000. Area: 3,341 square miles

The Canary Islands are not usually included with the continental Spanish market, as they are several hundred miles from the mainland, have different customs regulations, and carry on their foreign trade largely through separate ocean services. Merchandise can not be transshipped economically from Spain to the Canaries. There is direct service to the islands from New York, as well as from northern Europe.

The islands are essentially agricultural (bananas, vegetables, nuts, tobacco), with some local industry and an important tourist trade. The principal centers are Santa Cruz de Tenerife and Las Palmas.

Commercial language.—Spanish should be used for all commercial purposes if at all possible; otherwise English is probably as readily understood as any other language.

American consular offices.—Consuls, Tenerife and Las Palmas.

CZECHOSLOVAKIA

From report by Commercial Attaché Karl L. Rankin, Prague

Population: 14,726,000. Area: 54,196 square miles

Comparatively few American or other foreign firms maintain their own organizations in Czechoslovakia, most of the import trade being in the hands of local agents. Prague (Praha) is the only metropolitan center in the country and is the commercial and financial as well as the political capital. In most cases it is advisable to give exclusive agency rights for the entire country to a Prague firm, leaving largely to it the responsibility for subagency distribution.

Ordinarily it is a serious mistake to give Czechoslovak territory to an agent in a neighboring country; likewise, very few Czechoslovak agents are equipped to cover foreign territory. Both political and business considerations make it desirable to handle Czechoslovakia independently, except in certain cases where American firms have their own organizations in a near-by country or where large stocks must be carried and can best be handled from a central point, such as the free ports of Hamburg and Bremen.

While it is not advisable to divide the Czechoslovak territory for purposes of general representation, five districts may be considered for secondary distribution through subagencies as follows (see map) :

WESTERN DISTRICT (BOHEMIA)

Chief cities: Praba (Prague), 848,000; Plzen (Pilsen), 121,000; Liberec (Reichenberg), 72,000; Usti nad Labem (Aussig), 63,000; České Budejovice (Budweis), 56,000; Carlovy Vary (Karisbad), 42,000.

Bohemia, one of the most highly industrialized areas of Europe, contains a large part of Czechoslovak industry. The following industries are highly developed in this area: Iron and steel, textiles, china, porcelain, glass, costume jewelry (Gablonz ware), leather, shoes, sugar refining, chemicals, paper, furniture, brewing and distilling, flour milling, woodworking, etc. Of the total population (7,100,000), over half is dependent on industry and commerce as against only 30 per cent on agriculture. The mineral resources of the district (lignite, coal, iron, kaolin, etc.) are considerable and are actively worked.

In the western part of the area are several of the most famous health resorts of Europe.

WEST CENTRAL DISTRICT (CENTRAL AND SOUTHERN MORAVIA)

Chief cities: Brno (Brünn), 264,000; Olomouc (Olmütz), 66,000

This district is also a highly industrialized area, though somewhat less so than Bohemia. About 40 per cent of the population (total, 2,600,000) is dependent upon industry and commerce, and the same proportion on agriculture. The industries of Moravia are much the same as those of Bohemia. Coal is extensively mined in the north and kaolin in the south. The principal crops are cereals, sugar beets, and potatoes; cattle raising and dairying are well developed.

NORTH CENTRAL DISTRICT (SILESIA AND NORTHERN MORAVIA)

Chief city: Moravska Ostrava (Mährisch Ostrau), 175,000

Over 60 per cent of the population of this district (1,000,000) is dependent on industry and commerce, as against only about 25 per cent engaged in agriculture. This district includes the richest coal-mining area of the country.

EASTERN CENTRAL DISTRICT (WESTERN AND CENTRAL SLOVAKIA)

Chief city: Bratislava (Pressburg), 124,000

Agriculture (including forestry) is the chief occupation in this district, providing for some 60 per cent of the population (2,700,000). There is, however, a considerable industrial interest, particularly in the west in the neighborhood of Bratislava. One of the most important iron-mining areas of the country is in this district.

EASTERN DISTRICT (EASTERN SLOVAKIA AND CARPATHIAN RUTHENIA)

Chief cities: Košice (Kaschau), 70,000; Užhorod (Ungvar), 33,000

This district is of little commercial interest. The population (1,300,000) is almost exclusively occupied in agriculture and forestry, and there is little industrial development.

Commercial language.—Czech is the official language of the country, but approximately 25 per cent of the total population speak German as the native tongue. It may be taken for granted that every importer or exporter in Czechoslovakia is equipped to correspond in German, but in general only the largest firms can handle English or French satisfactorily. On account of local prejudices, however, care should be taken not to distribute German letters and circulars outside of trade circles, except in the German-speaking districts of western Bohemia. It is best for a foreign firm to consult its local agent in all cases before undertaking any form of advertising.

American commercial and consular offices.—Commercial attaché, Prague; consul general, Prague.

DANZIG

Population: 408,000. Area: 745 square miles.

The Free City of Danzig, although politically independent, is generally included in the Polish market on account of its customs union with Poland. It is not large enough in itself to be regarded as a separate sales area. Owing to its similarity in many respects to Poznan and Pomorze, with the German language predominating in commercial affairs, these two districts are frequently included with Danzig for agency purposes.

Danzig is primarily a commercial city, shipping, financing, and merchandising goods to and from Poland and the Baltic States. The chief industry is shipbuilding and ship repairing; other industries include railway cars, sugar, confectionery, vegetable oils, flour, lumber, fertilizers, and amber.

Commercial language.—German.

American consular office.—Consul, Danzig.

DENMARK

Population: 3,550,000. Area: 16,574 square miles. Principal cities: Copenhagen (København), 771,000; Aarhus, 96,000; Odense, 78,000; Aalborg, 55,000.

Denmark constitutes a single sales area and can readily be covered by an agency at Copenhagen, the capital. As in the case of the other Scandinavian countries, the Danish market can best be handled independently, and in only exceptional cases has a general agency for all Scandinavia proved satisfactory. Likewise, the inclusion of Denmark in the territory of an agent abroad, as in Berlin or London, is not advisable.

Denmark is essentially an agricultural country, with very well developed dairying and meat-packing industries. All branches of agriculture are highly organized cooperatively. Manufacturing is largely for the domestic market. The leading industries aside from the agricultural branches are brewing, vegetable oil, tobacco, shipbuilding, textiles, automobile assembly, canning, electrical equipment, cement, machinery, silverware, and porcelain.

Copenhagen has a fifth of the country's total population and is the center of the great majority of Danish industrial and commercial enterprises. It is the seat of all Government offices and the

headquarters of the powerful agricultural cooperative societies, which play a particularly important part in the Danish market. The cooperatives of all the Scandinavian countries are to some extent associated, and a considerable amount of buying and selling for the organizations in the other countries is carried on through central offices in Copenhagen.

In certain cases, it might be advisable to select local agents acting under the Copenhagen office in the principal provincial cities. Generally speaking, however, one agent can cover the whole territory effectively.

Commercial languages.—The use of Danish is advisable, but English is very generally understood and spoken and it should be employed in preference to a third language.

American commercial and consular offices.—Commercial attaché, Copenhagen; consul general, Copenhagen.

FINLAND

Population: 3,582,000. Area: 150,000 square miles. Chief cities: Helsinki (Helsingfors), 255,000; Turku (Åbo), 75,000; Tampere (Tammerfors), 61,000; Viipuri (Viborg), 72,000; Vaasa (Vasa), 25,000; Kuopio, 23,500; Oulu (Uleåborg), 23,000.

Finland constitutes a single sales area and should in most cases be covered separately. The inclusion of Finland in the territory of a foreign agent located in a neighboring country is rarely advisable, though in some lines satisfactory sales have been made by local agents acting under American general representatives in Stockholm, Copenhagen, and other distributing centers. This applies especially where the volume of business expected is not sufficient to warrant a Finnish agent at the outset. From the standpoint of local sentiment and market characteristics, Finland is to be grouped with the Scandinavian countries rather than with the Baltic States.

Helsinki (Helsingfors), the capital, is the chief commercial and banking center and best location for a general agent; from it the southern section of the country can readily be covered. (The north is sparsely settled and of little commercial importance.) The port of Helsinki is usually icebound during January, February, and March, when shipments are made via the ice-free ports of Turku and Hanko.

The chief commercial interests of Finland are in connection with the large forest resources: Lumber, wood products, pulp and paper, matches, plywood, etc. Other industries (textiles, metal working, foodstuffs, tanning, and leather) are chiefly for the domestic market, though there is a growing export trade in dairy products. About 65 per cent of the population engages in agriculture.

The cooperative system is highly developed in Finland, with over 5,600 societies and an estimated membership of 700,000. Cooperatives account for about a third of the retail and more than half of the wholesale trade of the country. The central offices of the cooperative associations, of which the more important are the Cooperative Wholesale Society of Finland (Suomen Osuuskauppojen Keskuskuunta, or S. O. K.) and the Cooperative Wholesale Association (Osuustukkukauppa, or O. T. K.), are in Helsinki and offer a very valuable means for the introduction of foreign goods. (In regard to general headquarters for Scandinavian and Finnish cooperatives, see section on Denmark.)

Commercial language.—English and German are widely used, and English may be employed in correspondence. The Finnish forms of place and firm names are generally preferable. (The replaced Swedish forms of some place names are given in parenthesis above merely for identification purposes.)

American commercial and consular offices.—Commercial attaché, Helsinki; consul, Helsinki.

FRANCE

With reference to report by Thomas Butts, Trade Commissioner, Paris

Population: 41,835,000. Area: 212,736 square miles

General agency.—Most American lines sold in France are handled by general agents for the whole of the country at Paris. In exceptional cases the general agency may be located at another center or the country may be divided among several independent agents at some or all of the following cities: Paris, Lyons, Bordeaux, Marseille, Strasbourg.

The territory of a general agent for France often also includes Belgium-Luxembourg, Switzerland, and French North Africa (Algeria, Tunisia, French Morocco), but independent representation for these areas is usually preferable. Countries other than those mentioned should not be assigned to the Paris agent and, under ordinary circumstances, France should not be included in the territory of an agent in another country.

French industries are unusually widely spread throughout the country, and there is consequently little occasion for lines associated with particular industries or activities to consider the locality of such special interests for representation purposes. As most industries are well represented in the Paris area and as Paris is the chief commercial and transportation center, it is the logical agency seat for the great majority of lines, even for bulk commodities which are handled from the ports.

Major sales areas.—The thorough covering of the French market under a general agent in Paris will normally call for the establishment of four subagencies, at Bordeaux, Marseille, Lyons, and Strasbourg. This list may, of course, be extended to meet requirements of distribution and servicing, but the five major sales areas (one covered by the Paris office) will usually be found essential. The distribution of territory among these offices, as shown on the map, is somewhat arbitrary and will, naturally, be altered to suit the circumstances.

PARIS AREA

Population: 26,987,000. Principal cities: Paris (with suburbs) 4,630,000; Lille, 202,000; Nantes, 187,000; Le Havre, 165,000; Rouen, 123,000; Roubaix, 117,000; Nancy, 121,000; Clermont-Ferrand, 103,000; Rheims, 113,000.

The area normally covered directly from Paris includes all of northern and central France, except Alsace-Lorraine, comprising 60 per cent of the country in area and 65 per cent of the population, with 8 cities of over 100,000. Its economic importance is proportionately large. This area includes the chief cereal-growing and dairy-farming regions of France and the important wine and fruit-producing districts of the Loire and Seine valleys, Brittany, and

Normandy; the shipping and fishing interests of the northwest coast; the mining districts (coal and iron) of Lens and Longwy, which comprise a large part of the French metallurgical industry; and the greater part of the cotton and wool branches of the textile industry.

Paris, to a greater degree than most capitals, is the administrative, commercial, and financial center of the country. It is also the leading industrial city of France, and most French industries are well represented in the vicinity. De luxe industries (clothing, especially lingerie, toilet articles and preparations, furnishings, jewelry, etc.) are particularly prominent in the Paris district.

A great deal of the buying for the French colonies is done through the Paris headquarters of colonial companies.

In a normal season Paris is visited by about a million tourists, chiefly American and British. Permanent American residents in Paris number about 26,000.

Lille is one of the greatest wool-combing centers of the world. Other textile branches, particularly cotton spinning, are highly developed in the vicinity. Other leading industries include coal mining, iron and steel manufactures, chemicals, glass, beet sugar, etc.

Nantes, at the mouth of the Loire, is an important port and the chief marketing, distributing, and industrial center of western France. Its industries include shipbuilding, metallurgy, textiles, paper, soap, confectionery, canning (especially of fish), milling, sugar refining, glass, etc.

Le Havre is the center for an agricultural district in which stock breeding and cheese making are particularly important. The city ranks as the third most important French port and is largely occupied with shipping and allied interests. Its manufactures include, textiles, chemicals, petroleum products, ships, paper, metal goods, etc. Bulk commodities, such as cotton, petroleum, copper, lumber, fruit, and tobacco, are largely handled at this port and at *Rouen*, the other leading port of entry for the Paris region. *Rouen* is a large oil-refining center; its other industries includes chemicals and pharmaceuticals, cotton and linen textiles, paper, metal working, etc.; it is also an important entrepôt for wines and spirits. *Roubaix* is primarily a textile center (wool and cotton); its other leading industries are metal working, chemicals, and pharmaceuticals. The chief activities of *Nancy* and vicinity are wool and cotton textiles, leather working, mining and metallurgy, and furniture making; it is also the center for an important fruit-growing area, and preserves and confectionery are leading products. *Clermont-Ferrand* is in a fruit-growing region and specializes in canning and preserving; it has also a considerable rubber industry. *Rheims* is primarily a wine market; it has also sizable leather and textile industries.

ALSACE-LORRAINE

Population: 1,898,000. Departments included: Haut-Rhin, Bas-Rhin, Moselle. Principal cities: Strasbourg, 181,000; Mulhouse, 100,000; Metz, 79,000.

Although nearer to Paris than some districts covered directly from the capital, the commercial and industrial organization of Alsace-Lorraine makes advisable the assignment of these Provinces to an agent or subagent in Strasbourg. For the present at least

(a plebiscite is to be held in 1935) the Saar region can best be covered through the Strasbourg agency.

This is a thickly populated, highly industrialized area, very largely dependent on mining (coal, iron, potash, petroleum) and kindred industries, forest products, and Rhine traffic. It is also an important agricultural region, especially for wine-grapes and sugar beets.

Strasbourg is a Rhine port and a center for rail and canal traffic. As a terminus of the Rhine-Marne and Rhine-Rhone canal systems, it is an important distribution point for bulk commodities and heavy freight. Its leading industries include leather, wool textiles, canning and preserving (paté de fois gras), metal working, chemicals, etc. Mulhouse is a center for potash production and cotton textiles; Metz for coal and iron mining, leather manufactures, metal working.

BORDEAUX AREA

Population: 5,214,000. Departments included: Charente Inférieure, Charente, Haute Vienne, Gironde, Dordogne, Lot-et-Garonne, Tarn-et-Garonne, Landes, Basses Pyrénées, Hautes Pyrénées, Gers, Haute Garonne, Tarn, Ariège, Aude, Pyrénées Orientales. Principal cities: Bordeaux (and suburbs), 400,000; Toulouse, 195,000.

The Bordeaux area comprises the agricultural region of southwestern France (wine, dairying and stock raising, walnuts, and prunes); the most important lumbering district of France (Gironde, Landes) with practically the entire output of naval stores; the shipping interests of the southwestern ports, and a great variety of industries. There is little mining of importance in this area.

Bordeaux is an important port, particularly in the South American, Caribbean, and West African trade, and is a leading source of supply for the colonies. Principal industries include shipbuilding, canning and preserving, lumber and naval stores, chemicals and pharmaceuticals, leather, textiles, and petroleum refining. Bordeaux is one of the chief centers for wines and spirits.

Toulouse is a distributing center for a district which is largely agricultural; leather, perfumes and pharmaceuticals, and furniture, however, are important local industries. Among other cities and industries of this area are Limoges, china and shoes; Bayonne, shipbuilding, chemicals, etc.; Mazamet, wool combing; Viérzon, agricultural implements; Aubusson, carpets.

LYON AREA

Population: 4,512,000. Departments included: Saône et Loire, Jura, Loire, Ain, Rhône, Savoie, Haute Savoie, Isère, Ardèche, Drôme, Hautes Alpes. Principal cities: Lyon, 580,000; Saint Etienne, 191,000; Grenoble, 91,000.

The Lyon area is one of the most highly industrialized regions of France. On the agricultural side it includes the greater part of French silk culture and is a large producer of wines, walnuts, fruits, vegetables, and dairy products. Coal is mined extensively in the district, which has also the largest concentration of hydroelectric power in France.

Lyon, the third largest city of France, is the principal manufacturing and distributing center of the Rhone valley. The silk industry is largely concentrated in this vicinity; other leading industries

include chemicals, dyes, machinery, rubber, leather, canning, wood-working, furniture, etc. Saint Etienne produces silk textiles, machinery, and metals. Grenoble is the center of the leather-glove industry. It is also an important manufacturer of paper, metal goods, and cement.

MARSEILLE AREA

Population: 3,223,000. Departments included: Basses Alpes, Vaucluse, Gard, Herault, Bouches du Rhône, Var, Alpes Maritimes. Principal cities: Marseille, 803,000; Nice, 220,000; Toulon, 133,000.

The Marseille area leads in the production of common wine; other crops of importance are vegetables, olives, fruits, nuts, seeds, flowers and bulbs. It has also a large share of the silk culture, though the manufacture of silk is confined chiefly to the Lyon district. Lumbering is important, especially in Var. The mineral resources of the area include coal and lignite, bauxite, lead, zinc, and sea salt. The shipping interests of the Mediterranean trade are largely concentrated in and about Marseille. Manufacturing activity is extensive and varied, the refining and manufacture of imported raw materials being particularly important. The area includes the tourist and resort interests of the French riviera.

Marseille is the largest port in France in tonnage entered and cleared and ranks after Paris in population. It is the terminus for the Mediterranean, North African, and Oriental trade and for much of the west African and Atlantic. It is consequently a most important transshipment and forwarding point. Local manufactures and industries include chemicals and pharmaceuticals, rubber, ceramics metal working, shipbuilding, etc. It is a large entrepôt for the trade in wines and spirits and has a highly developed canning and preserving industry. Toulon is a port and naval base but is unimportant from the manufacturing standpoint. Nice is the center of the resort and tourist trade of the French riviera. Its principal industries are the preparation of olive oil and the manufacture of essential oils and perfumes. The chief center for the latter industry, however, is Grasse, a short distance to the west of Nice.

Commercial language.—English is widely understood, particularly in Paris and the large industrial centers, but French should be employed for correspondence and for sales literature in general.

American commercial and consular offices.—Commercial attaché Paris; consuls general, Paris, Marseilles; consuls at Bordeaux, Boulogne, Calais, Cherbourg, Le Havre, Lille, Lyon, Nantes, Nice Strasbourg.

GERMANY

Based on report from D. P. Miller, Assistant Commercial Attaché, Berlin

Population: 64,104,000. Area: 180,989 square miles.

General agency.—While Germany is usually treated as a single sales area under one general agent with subagencies as advisable, the country is frequently divided, particularly for special lines requiring servicing, among several independent agents. A general agency covering the whole country will usually be located at Berlin, Hamburg or Bremen, though there are many exceptions to this practice occasioned by special considerations. Lines identified with definitely localized industries will naturally be represented in the district of

chief interest. For example, an agency for textile machinery would probably be at Leipzig or Dresden, for wood-working machinery at Stuttgart, for metal-working machinery at Düsseldorf or Berlin, etc.

For bulk commodities the agency is likely to be at the port. For example, foodstuffs, fruit, canned goods, lumber, nonferrous metals (except copper), petroleum, etc., are handled from Hamburg; coffee, cotton, tobacco, etc., from Bremen. Equipment and machinery, specialities, textiles, automobiles, builders' supplies (except lumber), copper, motion-picture film, etc., are in most cases handled from Berlin, where about half of the general agencies for American goods are located. The following are typical of the lines handled in various agency seats: Stuttgart, automotive equipment and electrical supplies for southern Germany; München, machinery and specialties; Dresden, tobacco and tobacco machinery; Leipzig, electrical supplies, household equipment; Chemnitz, textile machinery; Weimar, shoes and chemicals; Hannover, rubber; Königsberg and Breslau, agricultural equipment and seeds.

The geographic distribution of American agencies in Germany is shown by the following list of general distributors of American lines. There are, in addition, a large number of subagents located all over Germany.

Berlin.....	486	Dresden.....	9
Hamburg.....	317	Leipzig.....	9
Cologne.....	80	Weimar.....	6
Frankfort.....	77	Chemnitz.....	4
Bremen.....	53	Königsberg.....	4
Stuttgart and vicinity.....	34	Hannover.....	3
München and vicinity.....	32	Scattered.....	128*

An agency in Germany will frequently cover neighboring countries as well and thus become an agency for northern and central Europe rather than for Germany alone. This arrangement applies particularly to bulk commodities handled from the free ports of Hamburg or Bremen. Countries included in an agency district of this kind are usually the Baltic States (Estonia, Latvia, Lithuania), Austria, Hungary, Czechoslovakia, and often Switzerland and Poland. Other countries can not ordinarily be satisfactorily covered in this way.

In some exceptional lines western, or even all, of Germany is included under an agent in Antwerp, Brussels, or Rotterdam.

Sales areas.—In covering the German market five major sales areas are to be considered. When the country is under a single general agency, these districts will be handled, one by the general agent directly and the others by subagents acting under the central office. For thorough covering of the market, this number of districts can not well be reduced, though it may be extended almost indefinitely, depending on the nature of the line and the requirements for local distribution and servicing.

NORTHEAST DISTRICT

Population: 16,800,000. Provinces included: Brandenburg, Pomerania, Mecklenburg, Silesia, East Prussia. Chief cities: Berlin, 4,336,000; Breslau, 616,000; Königsberg, 280,000; Stettin, 254,000.

This district, although including such relatively distant Provinces as Upper Silesia and East Prussia, is normally covered from Berlin. Of the total population, 27 per cent is agricultural and 52 per cent

industrial and commercial. The agricultural interest preponderates in East Prussia, Pomerania, and Mecklenburg, while in Brandenburg (including Berlin) 65 per cent of the population is dependent on trade and industry, and in Silesia 52 per cent.

There is a large concentration of industry in the Berlin area, including iron and steel, machinery, textiles, chemicals, leather, electrical equipment, copper, glass, and ceramics. Berlin is the principal banking, commercial, and railway center of Germany and is, of course, the seat of the offices of the National Government.

Breslau is the chief center of Silesia, one of the most important mining and manufacturing areas in Germany. The industries of this section include coal, iron, zinc, and lead mines, textiles (especially linen), chemicals, machinery, glass, ceramics, leather, and beet sugar. Silesia is also an important agricultural area (cereals, potatoes, sugar beets, flax).

Königsberg is the port and chief city of East Prussia. It is an important shipping and rail center, and has considerable manufacturing interest (machinery, textiles, chemicals, shipbuilding). It serves to some extent as a transshipment point for the trade of eastern Poland. There are considerable forests in the Province, and sawmilling, pulp, and paper, are leading industries.

Stettin, a free port, is the principal German port for the Baltic trade. The leading industries of the district are shipbuilding, textiles, chemicals, and iron and steel manufactures.

NORTHWEST DISTRICT

Population: 9,600,000. Principal provinces included: Schleswig-Holstein, Hannover, Oldenburg, Brunswick, Anhalt, Northern Saxony. Chief cities: Hamburg, 1,148,000; Hannover, 435,000; Bremen, 306,000; Magdeburg, 294,000; Kiel, 219,000; Altona, 242,000; Brunswick (Braunschweig), 150,000; Lübeck, 128,000.

The principal agency seats in the northwest district are Hamburg and Bremen, from either of which the district can be adequately covered. In the area as a whole industry and trade predominate, accounting for 57 per cent of the population as against 23 per cent dependent on agriculture. In Hannover and Oldenburg the agricultural interest is greater, but in none of the states is it as large as the industrial and commercial. Stock raising and dairying center in Schleswig-Holstein.

Hamburg is primarily a commercial city (43 per cent of population dependent on commerce, 32 per cent on industry). It is the chief port of Germany and, through its free-port facilities, serves likewise a large area of northern and central Europe. Import, export, and distribution dominate the city's business. As indicated above, Hamburg is a center for the trade in bulk commodities. Shipbuilding is the chief industry, followed by vegetable oil, rubber, chemicals, wood-working, leather, etc. Altona is so close to Hamburg that it may be treated as practically an extension of the larger city.

Bremen, the second largest German port, like Hamburg is dominated by shipping interests. It also is a free port and a leading center for trade in bulk commodities, especially cotton and tobacco. Its leading industries are shipbuilding and allied trades, wool combing, tobacco, flour milling, vegetable oils, etc.

Hannover is an important railway center. Its chief industries include rubber products, potash, metal working, automobiles, and wool textiles. Brunswick is a center for milling machinery, scientific instruments, linen textiles, etc. Kiel and Lübeck are leading Baltic ports, with important shipyards and kindred industries. Lübeck is somewhat the more diversified industrially, having leather, linen, chemical works, etc. Magdeburg's principal industries are sugar, chemicals, machinery, metal working.

WESTERN DISTRICT

Population: 12,600,000. Principal Provinces included: Westphalia, Rhine Province. Principal cities: Cologne (Köln), 740,000; Essen, 649,000; Dortmund, 535,000; Düsseldorf, 476,000; Duisburg-Hamborn, 421,000; Wuppertal (Elberfeldt-Barmen), 406,000.

The western district comprises the highly industrialized area of the lower Rhine, of which Cologne is the chief city and logical distributing center for most lines. Düsseldorf is an alternative agency seat. Less than 15 per cent of the population is dependent on agriculture, as against 53 per cent on industry and 17 per cent on commerce. The district includes the richest coal and iron deposits in Germany (the Ruhr Basin) and these form the basis of most of the local industry, though other branches are highly developed as textiles, chemicals, leather, glass, margarine, brewing, etc. The Rhine Province is one of the chief wine-producing areas.

Much of the foreign trade of this district is through Rotterdam and Antwerp via the Rhine.

Cologne is the principal commercial and banking center of the lower Rhine district. In addition to other industries of the district, it manufactures gasoline and Diesel engines and railway cars and equipment. Essen and Dortmund are centers for iron and steel and machinery; Solingen and Remscheid for cutlery and tools; Düsseldorf for heavy-duty machine tools, railway cars, iron and steel pipe; Crefeld for silk and velvet; Wuppertal for rayon. Duisburg-Hamborn is one of the largest river ports in the world, as well as an important manufacturing center.

SOUTHERN DISTRICT

Population: 18,200,000. Principal Provinces included: Bavaria, Baden, Hessen, Hessen-Nassau, Thuringia, Württemberg. Principal cities: Frankfurt (including Offenbach), 700,000; Munich, 681,000; Nuremberg (Nürnberg), 393,000; Stuttgart, 342,000; Mannheim, 250,000; Augsburg, 166,000.

In the southern district are the industrial cities of the upper Rhine; it is also a rich agricultural area and the chief wine-producing section of Germany. It includes also the largest of the German forests. (Over 30 per cent of the area of Württemberg and Baden is forested.) Of the total population of the district, 53 per cent is dependent on industry and commerce and 30 per cent on agriculture and forestry. The industrial interest is considerably greater than the commercial, Thuringia being, on the basis of dependent population, the most highly industrialized of the states (50 per cent), though in this instance industry is very largely of the small, cottage type. This district also includes many of the principal German tourist centers.

Frankfort, Stuttgart or, less frequently, Munich, are the usual agency seats for the southern district.

Frankfort, the headquarters of the German Dye Trust (I. G. Farbenindustrie), is the chief center for chemicals, pharmaceuticals, and dyes. Half of German automobile production is accounted for in the vicinity (the Opel factories being at Rüsselsheim). Other leading industries of the Frankfort neighborhood are leather and shoes, nonferrous metals, bicycles, jewelry, locomotives, sewing machines, typewriters, furniture, paper, tires. Most bulk cargoes reach Frankfort via the Rhine from Antwerp and Rotterdam.

Stuttgart is the center of an area of widely diversified interests—agricultural, forest, and industrial. Salt is the principal mineral resource. Leading industries are lumber and woodworking, metal working and machinery, textiles, automobile parts, surgical and musical instruments.

Munich is the center of the important Bavarian agricultural and forest district. It is also one of the principal German tourist centers. Leading industries of the district are hosiery and knit goods, locomotives and railway equipment, aero engines, brewing, paper, and pharmaceuticals.

Nuremberg industries include machinery, railroad equipment, electrical goods, trucks and motorcycles, leather and leather manufactures, metal wares, and pencils. Mannheim is an important river port and shipping center; its manufactures include machinery, textiles, chemicals, and leather. Cotton and wool textiles, motors, engines, and airplanes are produced at Augsburg.

SAXONY

Population: 6,800,000. Provinces included: State of Saxony and southern half of Province of Saxony. Chief cities: Leipzig, 879,000; Dresden, 632,000; Chemnitz, 336,000; Halle, 194,000; Plauen, 111,000.

This district is rich in natural resources, agricultural, forest, and mineral (coal, tin, potash, etc.). It is also one of the most highly industrialized sections of Germany; 53 per cent of the population is dependent on industry as against 13 and 16 per cent, respectively, on agriculture and commerce. It has also a highly remunerative tourist traffic. Agencies for this district are usually located at Leipzig or Dresden.

Leipzig is the wholesale center for hides and skins, furs and bristles; it is the leading center in Germany for essential oils, fur dressing, printing, and bookbinding. It is an important manufacturer of surgical instruments and precision and other machinery. The Leipzig Trade Fair, one of the oldest and largest international fairs in Europe, has regular spring and autumn sessions in which many American firms actively participate.

Dresden is a center for the following industries: Tobacco, chocolates, photographic and optical instruments, typewriters, sewing machines, bicycles, radio parts, electric motors, and glass. Cotton hosiery, gloves, and textile machinery are leading branches at Chemnitz; laces and cotton goods at Plauen; chemicals, machinery, and cotton textiles at Halle.

Commercial language.—German should be used for correspondence if it can be used accurately, otherwise English should be employed. English is widely understood by German business men, especially in the port areas of Hamburg and Bremen.

American commercial and consular offices.—Commercial attaché, Berlin. Consuls general: Berlin, Dresden, Frankfort, Hamburg, München, Stuttgart. Consuls: Bremen, Breslau, Cologne, Leipzig.

GREECE

From report by Assistant Commercial Attaché R. B. Curren, Athens

Population: 6,205,000. Area: 130,200 square miles. Principal cities: Athens (Athenai), 460,000; Piræus (Peiræus), 252,000; Salonika (Thessalonike), 245,000; Patras (Patrai), 65,000; Kavalla, 51,000; Volos, 48,000; Candia (Erakleion), Crete, 33,000.

The Greek market can be effectively covered by an independent agent at Athens, with subagencies at Salonika, Patras, Volos, and Candia (Crete). Albania, Cyprus (British), and the Dodecanese Islands (Italian) may also be included in the territory of an agent at Athens if he has suitable connections in those areas.

About 60 per cent of the employed population of Greece is engaged in agriculture; 18 per cent in industry; and 13 per cent in commerce, transportation, and banking. The leading agricultural products are currants, tobacco, olive oil, and wine. Mineral production has an annual value of between \$3,000,000 and \$4,000,000 and includes iron, lead, zinc, chrome, emery, magnesite, etc. There are considerable forest resources of both soft and hard woods (spruce, pine, beech, oak, and chestnut). Industrial production is valued at about \$80,000,000 annually; leading industries are leather, alcoholic beverages, cotton and wool textiles, rugs, soap, tobacco, shipping and shipbuilding, cardboard, and paper.

Athens, the capital, and *Piræus*, the leading port, and vicinity constitute the chief consuming area of Greece. Athens is the administrative and financial center of the country and leads in the trade in leather, automobiles, machinery, chemicals, luxury articles, etc. Local industries include textiles, tanning, distilling, chemicals, automobile bodies, paper, rugs, furniture.

Piræus is the port of entry for the Athens district and a center for the transit trade in bulk commodities. It has a free zone and adequate warehouse and freight-handling facilities. Local industries include shipping and shipbuilding, chemicals, cement, distilling, dyes, flour milling, soap, olive oil.

Salonika is the second most important Greek port and is the entrepôt for Macedonia and western Thrace. It has Greek and Yugoslav free zones, the latter of which handles considerable shipments for southern Yugoslavia. Leading industries are shipping, textiles, tobacco, tanning, flour milling, distilling, and building materials.

Patras and Volos are ports of secondary importance and distributing points, respectively, for southwestern and east-central Greece. Candia is the principal commercial center for Crete.

Commercial language.—French is generally used for commercial purposes; less frequently German and English are used.

Commercial and consular offices.—Commercial attaché, Athens; consul general, Athens; consuls, Salonika and Patras.

HUNGARY

Population: 8,684,000. Area: 35,921 square miles. Principal cities: Budapest, 1,005,000; Szeged, 135,000; Debrecen, 117,000; Kecskemét, 80,000; Újpest, 67,000; Pécs, 62,000; Miskolcz, 61,000; Hodmezövasarhely, 60,000; Györ, 51,000.

Hungary constitutes a single sales area and may generally best be covered by an agent in Budapest. Although some traces of the pre-war commercial connections with Vienna and Prague still persist, the local prejudice strongly favors direct representation and, with rare exceptions, therefore, the assignment of Hungary to an agent in one of those cities is highly inadvisable. Hungary, however, is frequently covered through a general agent in Germany, particularly for bulk commodities handled from Hamburg and Bremen. It is very rarely advisable to assign territory outside of Hungary to a Budapest agent.

For secondary distribution it may be advisable to appoint sub-agents acting under the Budapest office at some or all of the cities listed above, especially at Szeged in the south and Debrecen in the east.

Hungary is essentially an agricultural country. It is one of the chief cereal-growing and cattle-raising regions of Europe, and its activities and industries are largely based on its agricultural production. The leading industries are flour milling, metal working, machinery, leather, and textiles.

Budapest, the capital and chief commercial, financial, and administrative center of Hungary, is an active Danube port and shipping point. It is one of the largest flour-milling centers in the world; other industries include wool and cotton textiles, machinery, leather, and chemicals.

Szeged, the second largest city of Hungary, is a river port (Theiss) with considerable textile, leather, and shipbuilding industries. Other principal cities and leading industries are as follows: Debrecen, ceramics; Pécs, ceramics, wool and cotton textiles, coal mining; Miskolcz, machinery, iron and lignite mining; Györ, wool textiles and machinery.

Commercial language.—The language of the country is Hungarian, but German may be used for commercial purposes. English is not generally understood.

American commercial and consular offices.—Commercial attaché, Budapest; consul general, Budapest.

IRISH FREE STATE

Population: 2,945,000. Area: 26,600 square miles. Principal cities: Dublin, 411,000; Cork, 78,000; Limerick, 39,000; Waterford, 27,000. (See map with United Kingdom section.)

Sentiment and tariff policy in the Irish Free State favor direct trade and the establishment of independent agencies. This situation should be taken into consideration in entering the Irish market. On the other hand, large sales in the Free State are made through

long-established trade channels in London and Liverpool, which in some cases may be preferred because of their advantage in financing and ability to handle large stocks. The small size of the country makes division for sales purposes unnecessary. A Dublin agent will usually establish a connection at Cork and possibly in other cities as well.

The Irish Free State is predominately agricultural, and industries are largely concentrated in the vicinity of the two large cities Dublin and Cork.

Dublin, the capital and administrative center, is the chief port. Its industries include shipbuilding, brewing and distilling, biscuits, flour, tobacco, textiles, boots and shoes.

Cork is the port for an important agricultural and dairying section. Industries in the district include brewing and distilling, textiles, fertilizers, tractors and parts, confectionery.

Commercial language.—English is used for commercial purposes.

American consular offices.—Consul general, Dublin; consul, Cork.

ITALY

Based on report by M. M. Mitchell, Commercial Attaché, Rome

Population: 41,508,000. Area: 119,744 square miles.

A general agency to cover all of Italy should, for the great majority of lines, be located in the north, usually at Milan, the commercial capital of the country, though if the product to be represented is closely indentified with a particular industry, the agency may better be in the chief center for that industry. If a general agency for the whole country is not granted, three independent agencies corresponding to the areas described below, will usually suffice. Subagents should be appointed by and should work under the direction of the general agent or district agents.

Southern Switzerland (Tessin), Albania, and Italian North Africa (Libya) may also be included in the territory of the agent for Italy if satisfactory connections are established.

Sales Areas.—Italy may be divided rather readily, because of its geographic features and the distribution of its industries, into three divisions—the northern, the central, and the southern. (See map.)

DISTRIBUTION OF ITALIAN COMMERCIAL UNDERTAKINGS, BY GENERAL AREAS ¹

Commercial classification	Per cent of total enterprises of each group			
	North	Central	South	Islands ²
Credit, exchange, insurance.....	58.0	20.1	16.0	5.9
Wholesale.....	57.7	15.4	17.3	9.6
Transportation, brokerage, etc.....	61.3	12.8	16.1	9.8
Retail.....	47.9	17.4	22.0	12.7
Hotels, theaters, publishing, etc.....	60.4	15.5	18.5	5.6
Total commerce.....	52.0	16.7	20.5	10.8
Percentage of total commercial employment.....	56.9	17.0	16.9	9.2

¹ According to the census of 1927.

² Sicily and Sardinia.

None of these three districts is exclusively either industrial or agricultural. The northern division includes much of the richest agricultural land in the country and a very high percentage of all its industry. The central district is largely agricultural, but has a considerable industrial development, especially along the coast. The southern district is predominantly agricultural, but has also a number of industries, largely connected with agriculture.

For some purposes a fourth district may be made of Sicily, or it may be regarded as a part of the southern district. For all practical purposes Sardinia may be disregarded as a potential sales territory.

NORTHERN DISTRICT

Population: 20,716,000. Area: 53,416. Provinces (Compartimenti) included: Piemonte, Lombardia, Venezia Tridentina, Liguria, Emilia, Marche, Veneto, Venezia Giulia. Chief cities: Milan (Milano), 965,000; Genoa (Genova), 623,000; Turin (Torino), 590,000; Trieste, 251,000; Bologna, 245,000; Venice (Venezia), 258,000.

The northern is by far the most important of the Italian sales areas. It includes 50 per cent of the population and 45 per cent of the total area, with 6 of the 12 largest cities of the country. It has 52 per cent of the industrial and the commercial establishments, with about two-thirds of the total number employed in each category. Probably 75 per cent of the wealth of the nation, and at least the same proportion of its industrial production, are concentrated in this district. It produces and consumes 68 per cent of the electric energy and has 68 per cent of installed industrial power of all sorts. Its ports handle 69 per cent of Italian foreign trade, and it has nearly 70 per cent of the motor-vehicle registrations of the country.

Nearly all Italian industries find their principal development in the northern district. Metallurgical and mechanical industries center around Genoa, Turin, Milan, and Trieste. Genoa and Trieste have important shipbuilding plants, and Turin produces more motor cars than all the rest of the country combined.

Cotton spinning and weaving, silk producing, spinning, and weaving, and allied activities are largely concentrated north of Milan; the most important woolen plants are near Turin. Shoes are an important industry near Milan, as is paper manufacture. The greatest hydroelectric developments in the country lie in this area. An important part of the glass industry is on the mainland near Venice, and the vegetable-oil mills are concentrated largely in Trieste. The fine chemicals and dyestuffs interests are nearly all in this territory, as well as the petroleum-refining plants. The felt and felt-hat industry centers around Monza and near Como north of Milan, and at Alessandria between Milan and Genoa.

Milan is the commercial capital of the country. All the leading banks and most of the great commercial and industrial undertakings have their main offices there, and it is the proper location for a great majority of the head agencies for foreign goods. Practically all the cotton for the Italian textile industries is bought and sold there, and all the silk is handled through its brokers and warehouses.

Turin is the center for automotive supplies, wool and wool products, and prepared foodstuffs, except fruits and fish.

Genoa handles a large part of all the imports of coal, wheat, colonial products, lumber, hides and leather, and frozen meats and packing-house products. It is the terminus of the largest Italian steamship lines and shares the shipbuilding industry with Trieste.

The valley of the Po contains the most productive agricultural land in Italy; its produce includes cereals, sugar beets, vegetables, deciduous fruits, and flax. Extensive vineyards cover the mountain slopes, and in the west valuable crops of cherries and walnuts are raised. Dairying and cheese making are important.

CENTRAL DISTRICT

Population: 5,827,000. Area: 18,804. Provinces included: Toscana, Umbria, Lazio. Chief cities: Rome (Roma), 915,000; Florence (Firenze), 317,000; Leghorn (Livorno), 130,000.

The central district, which comprises 16 per cent of the total area and 14 per cent of the population of the country, is essentially agricultural (grazing, sheep raising, wine, olive oil, sugar beets, cereals), though it has some important industries, as marble (Carrara), straw hats, heavy chemicals and fertilizer (Terni), leucite-aluminum (Civitavecchia), and paper. It has also a considerable hydroelectric development. In the central district are 16 per cent of the industrial, and 17 per cent of the commercial establishments of the country, with similar proportions of the employment in each category. Over half of these activities are concentrated in Tuscany, the northern section.

There is no really important commercial city in this district. Rome and Florence are large consuming centers but they are not important distributing points for the surrounding country. However, an agent who must sell particularly to the Government should be located in Rome.

SOUTHERN DISTRICT

Population: 14,312,000. Area: 38,221. Provinces included: Abruzzi-Molise, Campania, Puglia, Basilicata, Calabrie, Sicilia. Chief cities: Naples (Napoli), 976,000; Palermo, 447,000; Catania, 282,000; Messina, 204,000.

Including Sicily, which may, if advisable, be treated as a separate sales area, the southern district comprises 38 per cent of the total area and 34 per cent of the population of Italy. It has about 30 per cent of the industrial and of the commercial establishments of the country, with 18 per cent of the industrial, and 24 per cent of the commercial employment.

The southern district is essentially agricultural and pastoral, but there is considerable important industry in and around Naples, which is the center of the largest fruit and vegetable canning industry in Europe. Tomatoes in various forms are the most important pack. Other industries of the district include glove making, tanning, paper, cotton textiles, chemicals, etc.

The southern part of the district, together with Sicily, is one of the great citrus-fruit regions of the world. Other valuable crops are olives, walnuts, almonds, grapes, and deciduous fruits. The Puglian plain, on the Adriatic, is the chief sheep-raising region of the country. Cheese making is an important industry.

SICILY

Population, 4,500,000. Area, 10,000 square miles.

Sicily, which may advantageously be treated as a separate sales district for some lines, has three of the largest cities of the country—Palermo, Catania, and Messina. In number of industrial establishments, Sicily ranks second only to Lombardy (Milan), but the average employment is low. Of the commercial establishments, the island has about 9 per cent, with 7½ per cent of the employment. Citrus fruits, almonds, and olives are produced in great quantities in Sicily, and the trade in them and the preparation and sale of by-products, such as essential oils, citric acid, etc., is most important. The sulphur mines constitute one of the chief resources of the island.

Commercial language.—If Italian can not be used, correspondence had better be in English; French and German are widely understood.

American commercial and consular offices.—Commercial attaché, Rome; Consuls general, Rome, Genoa, and Naples; Consuls at Florence, Leghorn, Messina, Milan, Palermo, Trieste, Turin, and Venice.

NETHERLANDS

From report by Paul S. Guinn, Assistant Commercial Attaché, The Hague

Population: 7,920,000. Area: 13,213 square miles. Principal cities: Amsterdam, 752,000; Rotterdam, 582,000; The Hague, ('s Gravenhage), 437,000; Utrecht, 154,000; Haarlem, 120,000.

The Netherlands should be treated as an independent sales area under a general agent appointed for the country. If all or part of European business is directed from some central point a separate agent or distributor should be appointed in the territory. Owing to its geographical position and shipping and other facilities, the Netherlands is frequently used as a distributing center for western and northern Europe.

The Netherlands is densely populated, intensely cultivated, and is becoming increasingly industrialized. Of the total population close to 50 per cent live in towns and cities of over 20,000 inhabitants, with over 25 per cent in the five largest cities. Of the employed population 40 per cent are engaged in industry, 23 per cent in agriculture, 21 per cent in trade and transportation, and 16 per cent in professions and public service. Leading industries include: Coal mining, textiles (including rayon), shipbuilding and repair, dairy products (cheese, condensed milk), margarine, electrical equipment (radios, lamps), glass and porcelain, chemicals, shoes and leather, colonial products (tobacco, chocolate), and confectionery.

On account of its small size and the ease of communication, the Netherlands can be readily covered from almost any point. Rotterdam leads in the trade in grains, oils, fats, and some other products, while Amsterdam is the center for such lines as lumber and colonial products, but there are firms in most of these lines in both cities as well as elsewhere in the country. In the selection of agencies some preference may be given to Amsterdam and Rotterdam because of lines associated with them and because they are the principal seaports and commercial centers, but in general firms with proper facilities in The Hague, Arnhem, Haarlem, Leiden or elsewhere should be given

full consideration. Frequently firms located inland have a depot or representatives at one of the main seaports.

In addition to firms purchasing for Netherland India and other colonial and foreign territories, there are a large number of chain-store, consumer and agricultural cooperative societies in the Netherlands. These, however, are so widely distributed that aside from possible individual lines they can be covered from almost any point.

Commercial languages.—If the Dutch language can not be used fluently, correspondence should be carried on in English. The use of German is of no advantage over English.

American commercial and consular offices.—Commercial attaché, The Hague; consul general, Amsterdam; consul, Rotterdam.

NORWAY

From report by Commercial Attaché Marquard H. Lund, Oslo

Population: 2,821,000. Area: 125,017 square miles. Principal cities: Oslo, 250,000; Bergen, 97,000; Stavanger, 47,000; Trondheim, 54,000; Drammen, 26,000; Alesund, 19,000; Kristiansand, 19,000; Kristiansund, 15,000; Tromsø, 11,500.

Norway may be regarded as a single sales area to be covered from Oslo, the center of the populous, industrial section in the southeast. Except for firms catering primarily to the fishing industry, when headquarters might be established at Bergen or Stavanger, Oslo is the logical seat for a general agency for Norway. Though there is no objection to an American representative including Norway in his territory together with other countries, Norwegian business men do not readily deal with a general representative of other nationality located in Denmark or Sweden and covering all of the Scandinavian countries. Although in a few instances such arrangements have been satisfactory, as a rule it is best to have entirely independent Norwegian representatives.

The general agent in Oslo can cover directly the vicinity which comprises the more important section of the Norwegian market. On account of the difficulties and time involved in covering the west coast, that area may be considered as constituting one or more separate sales districts, frequently given to subagents acting under the Oslo office. Selling trips in this territory are usually made twice a year, in the fall for spring business and again in the spring for fall business. On account of the distance, selling costs are high, and salesmen, therefore, usually carry a number of lines.

Oslo is the center of a district containing over half the population and most of the important industry of Norway. Drammen and Kristiansand are important towns in this district. The principal industries of this area are lumber, pulp and paper, electrical equipment, iron and steel, shipping and shipbuilding, whaling, chemicals, textiles, and foodstuffs. This district has also most of the good farming land of the country.

The west coast is sparsely settled and much of it is accessible only by sea. The chief cities of the coastal region are Bergen, Stavanger, Trondheim, Alesund, Kristiansund, and Tromsø. Shipping, shipbuilding, canning, and aluminum manufactures are the chief industries in the southwest, and fishing, mining, and lumber-

in the northern coastal district. Narvik (9,000) is the port for a large part of Swedish iron ore exports.

Commercial language.—Norwegian is the only language spoken in Norway, but practically every important Norwegian concern can correspond in English. American salesmen very seldom find interpreters necessary.

American commercial and consular offices.—Commercial attaché, Oslo; consul general, Oslo; consuls, Bergen and Stavanger.

POLAND

Based on report from Gilbert Redfern, Trade Commissioner, Warsaw

Population: 31,928,000. Area: 149,957 square miles

General agency.—The Polish market for most lines can best be covered through a national distributor established in Warsaw and having branches or subagents in the provinces. In many instances, such a distributor should have close contact with the Government purchasing departments (the state being by far the largest buyer in Poland) and with distributing organizations, like the agricultural syndicates and the central purchasing offices of the industrial cartels, in Warsaw.

For products identified with particular industries, agents might better be located at the centers of such industries.

Covering the Polish market through Berlin, Vienna, Copenhagen, or a distributorship organization located elsewhere in Europe, as tried by many American manufacturers, has not proved generally satisfactory.

The following typical American products are best handled through national distributors established at Warsaw: Automobiles, automotive parts and accessories, service-station equipment, agricultural implements, tractors, tires, office equipment and appliances, rubber goods, food products, electrical equipment, industrial machinery (other than mining equipment), leather, toilet articles, motion pictures, etc. It is not advisable to split the territory though in exceptional cases, Upper Silesia, Poznan, and Pomorze, or one or the other of the major divisions may be assigned to a local firm that may be able to give more efficient service on a particular line.

Sales areas.—For sales purposes Poland may be divided according to the political areas combined in 1919 to form the Republic. (See map.) The significance of this political classification from the standpoint of trade lies in the fact that the three legal systems (German, Russian, Austrian) prevailing before the union are still in force and that consequently different commercial laws and practices distinguish the various districts. These districts are as follows:

CONGRESS POLAND (INCLUDING EASTERN PROVINCES)

Population: 18,000,000. Area: 107,940 square miles. Chief cities: Warsaw (Warsawa), 1,178,000; Łódź, 605,000; Wilno (Vilna), 196,000; Lublin, 113,000; Czestochowa, 118,000; Białystok, 91,000.

This area, previously Russian territory, comprises by far the larger portion of the country. Approximately 80 per cent of the

population is engaged in agriculture, including stock raising and forestry. Warsaw, the capital and chief commercial and financial center, is the logical location for a general distributor for most lines. Łódź is the center of one of the largest cotton-textile industries of Europe. Wilno is the center of the lumber and flax industries. The leading industries of the Warsaw-Łódź district are textiles, locomotive and car building, textile and metal-working machinery, machine tools, paper, automotive and aircraft, pharmaceutical and toilet goods, rubber, electrical equipment.

POZNANIA AND POMORZE (NORTHWEST)

Population: 3,200,000. Area: 16,450 square miles. Chief cities: Poznań (Posen), 247,000; Bydgoszcz (Bromberg), 118,000; Torun (Thorn), 50,000; Grudziadz, 50,000; Gdynia, 30,000.

These Provinces were formerly German (Posen and Pomerania) and are industrially more highly developed than other sections of the country. Agriculture, however, occupies about 70 per cent of the population. Stock raising is a leading occupation in this district, which is also the center of Poland's important beet-sugar-refining industry. Industrial enterprises include saw mills and wood-working, and manufacture of locomotives, agricultural implements, paper, rubber goods, and machinery. Poznań is the chief distributing center for this area.

The construction and development of the new port, Gdynia, on the Baltic, has added shipping to the interests of this area.

Poznania and Pomorze are often included in the Danzig sales area.

GALICIA (SOUTH)

Population: 3,500,000. Area: 24,200 square miles. Chief cities: Krakow (Cracow), 221,000; Lwów (Lemberg), 316,000.

Galacia, previously Austrian, is an important agricultural and mining area. In the western part the Silesian coal and iron deposits extend into the Province; the oil fields and the petroleum-refining industry center about Lwów in the east. Lwów is the best location for the distribution of oil-field equipment. There are also large deposits of salt and potash in the Province, the latter supplying the basis for an important chemical-fertilizer industry. Krakow is the distributing center for western, Lwów, for eastern Galacia.

UPPER SILESIA (SOUTHWEST)

Population: 1,300,000. Area: 1,600 square miles. Chief city: Katowice, 128,000.

Polish Upper Silesia, previously German, is predominately a mining area with extensive deposits of coal, iron, zinc, and lead. It is the center of the Polish iron and steel industry. For the sale of mechanized mining equipment, etc., an agency might advantageously be placed with a firm in Katowice, the capital of the Province.

Commercial languages.—Polish, German, French. English should be employed only when its use is indicated.

American commercial and consular offices.—Commercial attaché, Warsaw, consul general, Warsaw.

PORTUGAL

From report by R. C. Long, Commercial Attaché, Lisbon

Population: 6,191,000. Area: 34,604 square miles. Principal cities: Lisbon (Lisboa), 594,000; Porto, 228,000; Setúbal, 40,000; Coimbra, 27,000; Braga, 27,000; Evora, 22,000; Covilhã, 16,000; Faro, 14,000.

The continental Portuguese market is best covered by an exclusive agency at Lisbon, with a branch at Porto. If a branch is not maintained at Porto, an independent agent for the northern part of the country should be appointed at that city. Less usually, the Porto agent covers the whole country. The larger Portuguese importers have connections in the other principal centers mentioned above.

Though there is no objection to an American representative including Portugal in his territory together with other countries, Portuguese business men do not readily deal with a representative of a house located in Spain and covering Spain and Portugal. While in some instances such arrangements have been satisfactory, as a rule it is best to have entirely independent Portuguese representation.

Portugal is predominantly an agricultural country, but agricultural methods are primitive and the general standard of living is low. Grain, wine, olives, fruits, nuts, and a variety of vegetables are the leading crops. Though in recent years some progress has been made in the development of industry, it is estimated that only about 5 per cent of the population is employed in manufacture. The country is rich in mineral resources (coal, lead, tin, pyrites, wolfram, zinc, etc.) and mining production is increasing, though there is comparatively little local refining. The forests are an important asset with cork in the south, naval stores and lumber in the central and northern sections. A considerable portion of the population is engaged in fishing, and fisheries products (especially sardines) are an important factor in the export trade. Industries, in order of importance, are as follows: Foodstuffs (wine, milling, vegetable and fish canning, olive oil, etc.), textiles, chemicals, shoes and leather, cork, glass, ceramics, metal working. Most of the manufacturing and commercial interests of the country are concentrated in and around Lisbon and Porto.

Lisbon, the capital and chief port, is the principal commercial and financial center of Portugal. It has adequate port facilities in the way of bonded warehouses, etc., and has direct rail connection with Paris. It is the leading center for the chemical and pharmaceutical, cork, and metal working industries, and other lines are well represented. It is the chief headquarters for colonial companies, and the transshipment trade with the colonies is considerable.

Porto is the commercial center for northern Portugal. Its port, Leixões, is second in importance to Lisbon. Cotton textiles, naval stores, shoes, and leather are manufactured chiefly in the Porto district. Port wine is the leading product. As a headquarters for colonial companies, it is second to Lisbon.

Commercial language.—While the use of Portuguese is preferable, most import firms are in a position to correspond in English. French is also quite widely understood. Although Spanish is generally understood, its use commercially is not advisable.

American commercial and consular offices.—Commercial attaché, Lisbon; consul general, Lisbon; consul, Porto. (See Azores and Madeira.)

RUMANIA

Based on report from Sproull Fouché, Commercial Attaché, Bucharest

Population: 18,172,000. Area: 113,887 square miles

General agency.—For the distribution of most American products, Rumania constitutes a single sales area which can be covered by a general agent at Bucharest, with adequate connections in the other sections of the country. Another center may be a more advantageous agency seat in the case of products identified with particular industries; an agent for oil-field equipment, for example, would probably be located at Ploesti, the center of the oil industry.

Sales in Rumania can not normally be satisfactorily handled by an agent in another country nor should territory outside of Rumania be assigned to the Bucharest agent. In making agency arrangements in this section of Europe, consideration must be given to the strong sentiment in favor of local representation.

Sales districts.—From considerations of geography, transport facilities, business requirements, and dominant language, Rumania falls into four districts. Of one of these, Bucharest is the center and the others will usually be covered by subagents. (See map.)

SOUTHERN DISTRICT

Chief cities: Bucharest (București), 875,000; Ploesti, 115,000; Craiova, 75,000; Constanta (Constantza).

The southern district, comprising most of Wallachia and southern Dobruja, is tributary to Bucharest, the capital, and by far the most important distributing center of the country. Although largely agricultural, the industrial and commercial development of this area is considerable. It includes the largest petroleum industry in Europe, centering about Ploesti, and the flour-milling industry of Bucharest, which ranks among the largest in the world. Craiova is the distributing point for the western part of this area and Constanta, Rumania's chief port, is a shipping and commercial center of importance. Leading industries of this area are flour milling, textiles, metallurgy, pottery, oil-well machinery (at Ploesti), saw-mills, beet sugar, etc.

The language of this area is Rumanian, but French and German are generally understood by business men.

WESTERN DISTRICT

Chief cities: Timișoara (Temesvar), 110,000; Cluj (Klausenburg), 100,000; Oradea (Grosswardein), 90,000; Arad, 85,000; Brașov (Kronstadt), 58,000.

The territory (Transylvania and the Banat), formerly Hungarian, to the west and north of the Carpathians is an economic as well as a geographic division. It is the most highly industrialized section of the country and differs widely in customs, business usages, and language from the other parts. This section includes the larger part of the minerals (except oil) and the forests of the country. Principal industries are mining and metallurgy, sawmilling and woodworking, flour milling, textiles, etc. Cluj, in the center, and Timișoara, in the southwest, are the chief distributing points.

The industrial and business population in general speak Hungarian or German, and the business methods employed are pre-vaillingly Teutonic.

NORTHEASTERN DISTRICT

Chief cities: Cernauti (Czernowitz), 175,000; Chişinau (Kishinev), 175,000; Iaşi (Jassy), 100,000.

This district (Bucovina, northern Moldavia, and Bessarabia) is largely agricultural, its principal industries being lumbering, flour milling, and sugar refining. Iaşi (Moldavia), Cernauti (Bucovina), and Chişinau (Bessarabia) are the chief distributing points for this area.

In Bessarabia the majority of the inhabitants speak Russian only, while the merchants in the cities understand German. In Bucovina, the German language predominates; in Moldavia, the Rumanian.

EASTERN DISTRICT

Chief cities: Galati (Galatz), 130,000; Braila, 80,000

This area (southern Moldavia and Bessarabia and northern Wallachia and Dobruja) is also largely agricultural, industry being largely confined to shipping, sawmilling, flour milling, and fishing. Galati and Braila on the Danube are the main grain and lumber shipping ports for the country and distributing points for the district.

Commercial language.—Rumanian, German, or French. The use of English is very limited.

American commercial and consular offices.—Commercial attaché, Bucharest; consul, Bucharest.

SPAIN

From report by Julian Greenup, Assistant Commercial Attaché, Madrid

Population (1928) : 22,600,000. Area : 195,000 square miles

General agency.—The Spanish market can, for most commodities, best be covered through an exclusive agency at Barcelona. Such an agent should be equipped to establish, or have already established, branches or subagencies in Madrid, Seville, Bilbao, Vigo, Valencia, and Malaga. The Spanish market should be subdivided into exclusive sales areas only when a properly qualified general agent is not available. Where sales to Government departments, railways, monopolies, etc., are of primary importance, Madrid is the better center; other centers may be better suited to products identified with particular industries.

Sales areas.—Spain may be divided into seven sales districts, each with the exception of the Madrid area, centering about a port. These districts, in the order of their commercial importance, are as follows:

BARCELONA DISTRICT (NORTHEAST)

Population: 3,700,000. Provinces included: Barcelona, Gerona, Lerida, Huesca, Zaragoza, Tarragona, Balearic Islands. Chief cities: Barcelona, 840,000; Zaragoza, 166,000.

Barcelona is the largest city in Spain and the leading port. It is the most important manufacturing and commercial center of the

country and serves as the distributing point for the largest area of concentrated population. It maintains a large free-port area with adequate warehouse facilities and is a terminal for the two principal railway systems, serving practically all important regions directly.

The Barcelona district, with a fourth of the taxpayers, accounts for a third of the tax paid on commerce, industry, and professions. It has 24 per cent of the wholesale-retail trade of the country and is the headquarters for 42 per cent of Spanish limited liability companies with 30 per cent of the total capitalization of such companies. It leads by a large margin in nearly all branches of business and industry, especially in the following lines: Textiles, dyeing, irrigation, distilling, motion pictures, leather, machinery, import and export, electrical supplies, drugs, chemicals, etc. This district is also one of the most important in wine and fruit production.

The Balearic Islands can best be included in the Barcelona district. They have a population of 355,000, and Palma, on the island of Majorca, is the chief city. Agriculture is the leading occupation. There is a growing tourist traffic.

MADRID DISTRICT (CENTRAL)

Population: 3,900,000. Provinces included: Valladolid, Segovia, Soria, Salamanca, Avila, Guadalajara, Toledo, Cuenca, Ciudad Real. Chief cities: Madrid, 809,000; Valladolid, 93,000.

Madrid, the capital, is the operating center for the railway system and the headquarters of the chief banking, monopoly, and large corporation interests. On account of its central situation it is the most convenient location for traveling salesmen covering all of Spain, and a necessary headquarters for those whose business keeps them in constant contact with Government officials.

Madrid stands quite uniformly in second place as a business center, with 22 per cent of the wholesale-retail business, 22 per cent of the tax receipts, and 21 per cent of the head offices of limited-liability companies. The capital leads as a single agency seat for the automobile, railway, mining, and monopoly businesses, with the latter including tobacco, petroleum, matches, telephones, subsidized aviation, etc.

The grouping of head offices of mining companies in Madrid is one of several illustrations of the tendency to center large corporations in the capital. This tendency is further demonstrated by the fact that the 21 per cent of limited-liability companies that have their headquarters in Madrid represent over 46 per cent of the total capitalization of such companies. This district leads in cereal production and is a large producer of fruits and wine.

BILBAO DISTRICT (NORTH)

Population: 2,400,000. Provinces included: Vizcaya, Santander, Guipuzcoa, Navarra, Alava, Logrono, Burgos, Palencia. Chief cities: Bilbao, 154,000; Santander, 77,000; San Sebastián, 75,000.

The Bilbao district is an active mining and manufacturing area. Its principal industries are iron mining, iron and steel manufacture, shipping and shipbuilding, railway equipment, paper, fisheries, etc. Considerable fruit (apples, cherries, pears) is grown in this area, and dairying is well developed in the western part.

EUROPEAN SALES AREAS

VALENCIA DISTRICT (EAST)

Population: 3,200,000. Provinces included: Valencia, Castellon, Teruel, Albacete, Murcia, Alicante. Chief cities: Valencia, 317,000; Murcia, 153,000; Cartagena, 101,000; Alicante, 72,000.

The Valencia district is primarily agricultural, though it has considerable mining (lead, iron, zinc, tin) and some manufacturing interest. It leads in orange and rice growing and is an important producer of wine and nuts.

SEVILLA DISTRICT (SOUTHWEST)

Population: 3,400,000. Provinces included: Sevilla, Cádiz, Huelva, Córdoba, Badajoz, Cáceres. Chief cities: Sevilla, 236,000; Córdoba, 95,000; Cádiz, 77,000.

The Sevilla district is primarily agricultural (cereals, fruit, wine, nuts), with a considerable mining interest (copper and lead). It leads in cork production and, with the Málaga district, is the world's largest producer of olives and olive oil. Sheep raising is important in the northern part of the district.

VIGO DISTRICT (NORTHWEST)

Population: 3,800,000. Provinces included: Pontevedra, Coruña, Lugo, Oviado, Leon, Orense, Zamora. Chief cities: Vigo, 70,000; La Coruña, 68,000; Oviado, 74,000; Gijón, 57,000.

The Vigo district is the leading dairying and cattle-raising region of Spain. Fishing and fish canning, coal mining, shipbuilding and the bottling of mineral water are also important interests.

MALAGA DISTRICT (SOUTH)

Population: 2,300,000. Provinces included: Málaga, Jaen, Granada, Almería. Chief cities: Málaga, 177,000; Granada, 111,000; Almería, 52,000.

The Málaga district depends principally upon agriculture; it is a large producer of olive oil, beet sugar, fruits, and nuts. Mining (lead and iron) and fishing are also of considerable importance in this district; manufacturing is of less interest.

Commercial language.—Spanish should be used for all commercial purposes if at all possible, otherwise English is probably as readily understood as any other language.

American commercial and consular offices.—Commercial attaché, Madrid; consuls general, Madrid and Barcelona; consuls, Bilbao, Valencia, Vigo, and Málaga; vice consul, Sevilla.

SWEDEN

From reports by Commercial Attaché T. O. Klath and Trade Commissioner Basil Dahl, Stockholm

Population: 6,120,000. Area: 173,143 square miles

A general agency for Sweden will normally be located at Stockholm, the capital, a free port, and leading commercial and financial center. However, Göteborg, the chief overseas port, is a more advantageous headquarters for some lines. It is not advisable to divide the country for general agency purposes, though subagencies are frequently placed at Göteborg, Malmö, and Sundsvall.

Sweden should be considered an independent sales territory and only very rarely should be included under an agent covering all of the Scandinavian countries. If the Swedish market is assigned to an agent in another country (Berlin, Hamburg, or London), he should be an American, but, even so, it is a practice which usually has not proved satisfactory.

For organization of sales in Sweden and the appointment of sub-agents, the following districts may be considered. (See map.)

CENTRAL AND NORTHERN DISTRICT

Chief cities: Stockholm, 502,000; Norrköping, 61,000; Gävle, 39,000; Sundsvall, 18,000.

This district includes 77 per cent of the total area and 52 per cent of the population, which is largely concentrated in the south and east, centering about Stockholm. The district can readily be covered directly by the Stockholm agency.

The chief industries of this area are: Agriculture, wood pulp and paper, lumber and wood products, mining (iron ore), iron and steel, machinery, textiles, and chemicals.

The large mining and lumber industries of the sparsely settled north are usually supplied through head offices in Stockholm or Göteborg. Sundsvall is an important distributing point for this section.

WESTERN DISTRICT

Chief cities: Göteborg (Gothenburg), 243,000; Borås, 38,000; Jönköping, 31,000.

The western district includes the seven western Provinces, with 14 per cent of the total area and 27 per cent of the population. Göteborg is the second largest city of Sweden, a free port, and the chief port, especially for west European and trans-Atlantic trade. It is the logical distribution center for western Sweden and is sometimes selected as the seat of a general agency.

The leading industries of this district are agriculture, fishing, shipbuilding, pulp and paper, textiles, matches, lumber, iron and steel, leather, and glassware.

SOUTHERN DISTRICT

Chief cities: Malmö, 120,000; Hålsinborg, 56,700

The southern district comprises the five southern Provinces with 9 per cent of the total area and 21 per cent of the population. Malmö is the distributing center for this area. This is the chief farming district of Sweden and 45 per cent of the population is engaged in agriculture. Other leading industries are shipbuilding, cement, quarrying, flour, iron and steel, chemicals, lumber, and paper.

Commercial languages.—English and German are widely understood and, unless Swedish can readily be used, correspondence should be in English. Care should be taken to include the diacritical marks in Swedish place and firm names as their omission makes an unfavorable impression and may even lead to confusion in addresses.

American commercial and consular offices.—Commercial attaché, Stockholm; consul general, Stockholm; consuls: Göteborg and Malmö.

SWITZERLAND

From report by Charles E. Lyon, Commercial Attaché, Berne

Population: 4,082,500. Area: 15,944 square miles

Although Switzerland is divided into three sections according to the race and language of the inhabitants, it can best be treated as a single sales area. For most lines it is advisable to appoint a local agent, but if sales prospects do not justify this action, Switzerland may be included in the territory of a general agent in either France or Germany; it should not, however, be divided between two such agents, though, in such cases, Italian Switzerland may profitably be included in the territory of the agent for Italy.

French Switzerland comprises the five western Cantons of Geneva, Vaud, Neuchatel, Fribourg, and Valais, with the western border of Berne. Tessin in the south, with portions of Grisons and the eastern section of Valais, is Italian. In the rest of the country the population is predominantly German in race and language. Of the employed population of Switzerland, 44 per cent is engaged in industry, 26 per cent in agriculture, and 16 per cent in trade and transportation. The principal industries in order of employment are textiles, machinery, hotels, watchmaking, metal working, foodstuffs, wood-working, and chemicals. The tourist trade, with a normal annual expenditure in the neighborhood of \$60,000,000, is an important element in the Swiss market.

A general agency for Switzerland is usually located at Zurich, with a subagent at Geneva. Geneva, however, is frequently selected as the seat of a general agency with a local agent at Zurich. Sub-agents under the supervision of the central office may also be located at Basel, Berne, and Lausanne, but distances are so short that numerous local agents are not necessary and their appointment should be left to the general agent. Locarno and Lugano are increasing in importance as headquarters for agents covering southern Switzerland with Italy.

Zurich (250,000) is the chief financial, industrial, and commercial center of the country and the largest retail market. The leading industries of the district are textiles, electrical equipment, machinery, chemicals, straw braid, cheese, and chocolate.

Geneva (143,000) is the principal center of French Switzerland. The leading industries of the district are watchmaking, hotels, dairying and cheese making.

Basel (147,000) is the leading center for the entrepôt and wholesale trade and for dealers in raw materials and heavy goods. It is a Rhine port with "freilager" (bonded warehouse) facilities and is an important transshipment center, particularly for the Balkan trade. The leading industries of the district are dyes, chemicals, pharmaceutical products, watches, ribbon, spun silk, shoes, magnetos, and machinery.

Bern (112,000) is the seat of the federal Government and is the center for an important agricultural and tourist area. Leading industries of the district are watches and clocks, dairying, chocolate, industrial jewels, and textiles.

Lausanne (76,000), in French Switzerland, is largely dependent on the tourist traffic and has a highly developed hotel industry. The district is primarily agricultural. Wine, cheese, chocolate, and watches are leading products.

Commercial language.—The German-speaking element represents 69 per cent of the population, the French speaking 21 per cent, and the Italian speaking 8 per cent. These languages should be used for advertising or other literature for general distribution in the three racial sections of the country. For business correspondence either French or German may be used and English is widely understood.

American commercial and consular offices.—Commercial attaché, Berne; Consul general, Zurich; Consuls at Berne, Basel, Geneva, and Lausanne.

TURKEY

From report by Commercial Attaché Julian E. Gillespie, Istanbul

Population: 13,648,000. Area: Total, 294,492 square miles; in Europe, 13,013 square miles. Chief cities: Istanbul (Constantinople), 794,000; Izmir (Smyrna), 184,000; Ankara (Angora), 108,000; Adana, 109,000; Konya (Konia), 103,000; Bursa (Brusa), 127,000; Samsun, 30,000; Trabzon (Trebizond), 25,000; Mersin (Mersina), 22,000.

For most lines Turkey can be satisfactorily covered by a single agent at Istanbul. Subagencies at Izmir, Samsun, Trabzon, Adana or Mersin, Ankara or Konya are advisable for adequate distribution of such lines as automobiles, tires, agricultural machinery, etc.

The low purchasing power of the mass of the people restricts sales of American goods very largely to the upper classes in the cities.

Over 80 per cent of the population of Turkey is engaged in agriculture, producing chiefly cereals, tobacco, figs and raisins, nuts, opium, raw silk, etc. Mineral resources include coal, lignite, mercury, emery, manganese, chrome, antimony, etc. Over 10 per cent of the country is forested (pine, oak, beech, chestnut). Manufacturing is on a small scale and largely for the domestic market (foodstuffs, cement, sugar, textiles, cigarettes, tanning).

Istanbul is the chief commercial and financial center of Turkey and the leading port for imports. It is an important transshipment point and railway terminus. Local manufactures include tobacco, tanning, flour milling, knit goods, furniture, and bazaar goods. Izmir is the second largest commercial center and the leading port for export trade. Its industrial production includes olive oil, carpets, dried fruit, soap, flour, etc. Ankara, the capital, is important from the standpoint of government purchases. Samsun and Trabzon are Black Sea ports and distributing points for the Black Sea littoral. Samsun is the center for a famous tobacco-growing region. Mersin is the port for the Adana district.

Commercial languages.—French is the principal commercial language, but the use of English is increasing.

American commercial and consular offices.—Commercial attaché, Istanbul; consul general, Istanbul; consul, Izmir.

UNITED KINGDOM

Population: 46,190,000. Area: 94,281 square miles. Chief cities: London, 8,203,000; Glasgow, 1,088,000; Birmingham, 1,002,000; Liverpool, 856,000; Manchester, 766,000; Sheffield, 512,000; Leeds, 483,000; Edinburgh, 439,000; Belfast, 415,000; Bristol, 396,000; Hull, 313,000. According to the 1931 census there were 11 additional cities of over 200,000 population and 34 of 100,000 to 200,000.

The small size of the country and the ease of communication make a division of the British market for sales purposes in most cases unnecessary. Lines for country-wide distribution are therefore usually handled by a general agent in London who may appoint subagents in various other cities according to the requirements of his particular business. Such subagencies are usually located at Manchester, Birmingham, or Liverpool for the Midlands, Glasgow for Scotland, and Belfast for Northern Ireland. Additional centers are likely to be Bristol for the southwest, and Hull for the northeast of England. Territories assigned to subagents can be determined according to particular facilities or convenience.

If the Irish Free State is included in the territory of the agent for the United Kingdom, a connection at Dublin is usually advisable. (See section on Irish Free State.)

When the product to be marketed is closely identified with a particular industry, the location of that industry will, naturally, largely determine the choice of agency seats. Thus the center for cotton textiles is Manchester; for linen, Belfast; tobacco, Bristol or London; woolens, Leeds or Bradford; cutlery, Sheffield; etc. On the other hand, British industries are usually so widely distributed that no particular center is indicated and the various branches can be covered as readily from London as elsewhere, especially as most industries are well represented in the London district.

On the accompanying map the United Kingdom is divided into 16 districts, according to a recent domestic-market classification issued by the London Daily Mail. Only in exceptional cases where particularly complete local representation is required for servicing or other consideration, would it be advisable for an American company to establish connections on the basis of this classification. The following description of the various districts may, however, be of use in connection with the local distribution of certain products. (Refer to numbers on map.)

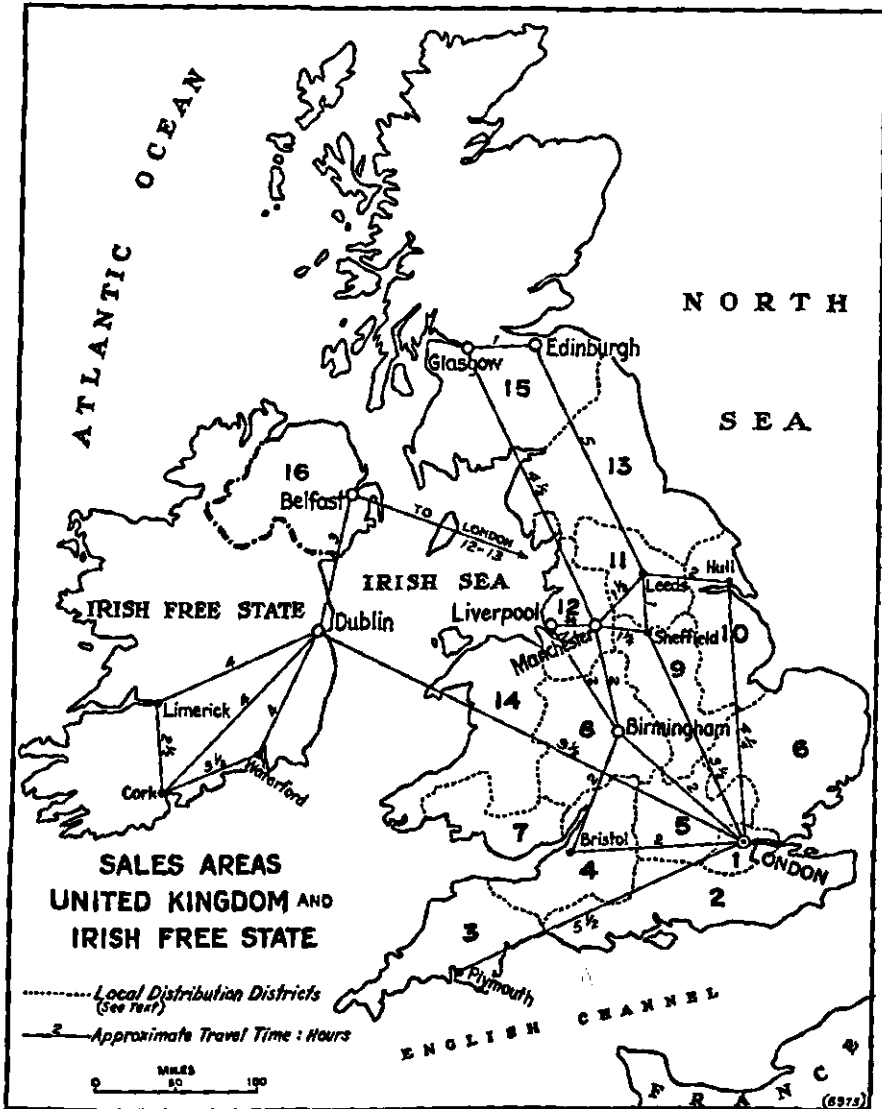
1. The metropolitan area (London and district) contains nearly a fifth of the total population of the United Kingdom and represents a much larger proportion of the purchasing power. It is the chief financial and commercial center, a very highly industrialized area with a wide range of manufactures, and the largest British port and railway terminal.

2. The south coast is essentially an agricultural, residential, and resort district, though it includes the commercial and industrial activities of the channel ports. Southampton is the largest city in this district.

3. Cornwall and Devon. This district is largely of agricultural and resort interest. The agricultural production includes dairy products, vegetables, fruits, and flowers. Plymouth is the commercial and industrial center of this district.

4. Gloucestershire, Somerset, Wiltshire. There is a considerable and varied industrial interest in this district, particularly in Bristol and vicinity (textiles, building materials, tools, engines, tobacco). It is also an important residential and resort area.

5. The Thames Valley and Hertfordshire. There has been a considerable movement of industry into this area within recent years,



particularly of the new industries (automobiles, radio, phonographs, domestic labor-saving appliances, etc.). There are no very large cities in the district, Reading and Oxford being the most important.

6. The East Anglian district is primarily agricultural, though there is considerable scattered industry (machinery, boots and shoes, woodworking, automobiles). The fishing, shipping, and resort interests are also important. Norwich is the chief center.

7. The South Wales district is largely dependent on coal mining and the tin-plate industry. The metal-working, chemical, building material, shipping, and other industries are active in the vicinity of Cardiff, the chief city and port. Other large centers are Swansea and Rhondda.

8. The Birmingham district is one of the most highly industrialized areas of England. Metal-working industries are centered about Birmingham and Wolverhampton; pottery about Stoke-on-Trent; brewing at Burton and bicycles and automobiles at Coventry.

9. The East Midlands district is a well-balanced industrial area. Leading manufactures are boots and shoes, leather, laces and other textiles, hosiery, clothing, railway rolling stock, agricultural machinery, etc. There are extensive coal fields in the northern part of this district. The principal cities are Nottingham, Leicester, and Derby.

10. Lincolnshire and the Humber. Except for the large commercial and industrial interests of the Humber ports, this district is chiefly agricultural. Hull and Grimsby are bases for the North Sea fishing industry and leading ports in the Scandinavian and Baltic trade. Industries of the Humber district include vegetable oils, chemicals, leather, and shipbuilding.

11. The West Riding of Yorkshire is almost exclusively a coal mining and manufacturing district. Sheffield is the chief center for iron and steel works (cutlery especially). Leeds, Bradford, Halifax, and Huddersfield are preeminently centers for wool textiles though they also have large machinery interests.

12. Lancashire and Cheshire. This district is dominated by the cotton textile and related interests (textile machinery, etc.), centering chiefly in Manchester and Liverpool. Other textiles are also represented, as silk at Macclesfield. Liverpool ranks as the second British port. In Cheshire cheese making and dairying are important.

13. The North of England. Coal mining, shipbuilding, and shipping are the chief industries of this area, centering about the cities and ports of the Tyne and Tees districts. Other industries of the area are iron and steel, engineering, glass, chemicals, building materials, etc. There is also a very large resort interest both on the coast and in the lake district. The principal cities are Newcastle, Sunderland, Middlesborough, Gateshead, and South Shields.

14. Wales (excluding the southern district, No. 7 above) is largely of agricultural and resort interest. Mining (coal and slate) is important in some sections. There are no large cities in this district.

15. Scotland, except in the neighborhood of the large cities, Edinburgh, Glasgow, Dundee, and Aberdeen, is largely agricultural, with considerable wool textile manufacture in the towns. The resort trade is seasonally important. Edinburgh, the capital, is an administrative and professional center. The Glasgow and Clydeside territory is industrially the most important in Scotland. Leading industries include shipbuilding, engineering and machinery, iron and steel, etc.

16. Northern Ireland. The linen industry predominates in this district. It is chiefly concentrated in and around the port of Belfast,

which has also a large shipbuilding industry and other miscellaneous manufactures.

American commercial and consular offices.—Commercial attaché, London; consuls general at London, Belfast, Glasgow, and Liverpool; consuls at Birmingham, Bradford, Bristol, Cardiff, Dundee, Edinburgh, Hull, Manchester, Newcastle, Plymouth, Sheffield, and Southampton.

YUGOSLAVIA

From report by Emil Kekich, Commercial Attaché, Belgrade

Population: 13,930,000. Area: 96,737 square miles. Principal cities: Belgrade (Beograd), 242,000; Zagreb (Agram), 185,000; Subotica, 100,000; Sarajevo, 78,000; Skoplje, 65,000; Novi Sad 64,000; Ljubljana, 60,000.

Yugoslavia can, in most cases, be treated as a single sales area, covered by a general agent in Belgrade. Occasionally a general agency is located at Zagreb or Novi Sad (as for agricultural machinery), but the tendency is toward greater commercial centralization in the capital. For some lines, or when an agent with adequate connections to cover the entire country can not be found, it may be advisable to appoint independent agents in Belgrade and Zagreb, in which case the country may be divided between the two as shown roughly on the map, the Belgrade agent covering the banovinas of Dunavska, Moravska, Zetska, Vardarska, and eastern Drinska; the Zagreb agent, Dravska, Savska, Vrbaska, Primorska, and western Drinska.

Some lines for which the Yugoslav market is at present too small to justify local representation, may be handled through an agency at Vienna. Local sentiment, however, strongly favors direct representation and the Yugoslav territory should not be assigned to an agent in Vienna or elsewhere abroad without very careful consideration.

A certain amount of selling is done in southern Yugoslavia from Salonika and in Dalmatia (western coast region) from Italian centers, but such arrangements are hardly satisfactory for the distribution of American goods.

Country-wide distribution will require connections at Belgrade (usually the head office) and Zagreb and at some or all of the other cities mentioned above.

Yugoslavia is primarily an agricultural country, though there has recently been a considerable industrial development. Agriculture (including forestry) supports about 85 per cent of the population. Forests cover about 30 per cent of the total area of the country and lumbering and woodworking are leading industries, particularly for export. The country's mineral resources include coal and lignite, copper, lead, zinc, bauxite, and iron. Other industries of local importance are leather, chemicals, and textiles.

Belgrade is rapidly becoming the chief commercial center of Yugoslavia. As the capital, it offers convenient contact with the Government offices which are important purchasers of supplies for the national construction and development undertakings. It is an important Danube port and railway center for shipments to other Balkan countries and to Turkey. Local industries include textiles, sugar, paper, meat, shoes, and leather.

Zagreb is the principal city of the Croatian section of the country and surpasses Belgrade as a banking center. It is the chief distributing point for northern Yugoslavia and is the headquarters of some leading importers. Local industries include textiles, lumber, oils, chemicals, and leather.

Subotica's importance is incident to its situation in the Danube Grain Belt. It is a trade center in agricultural products, livestock, poultry and farm implements. Local industries include cement, brick, furniture and chemicals, chiefly small undertakings. Sarajevo, the center of Bosnia, is increasing in importance as a trade and tourist entrepôt. Local industries include lumber, tobacco, textiles, and leather. Skoplje, a center of trade in opium, hides, and skins, is gradually becoming important as a distributing center for south Serbia. It has as yet no important industrial establishments. Ljubljana is the chief industrial and distributing center for Slovenia. Local industries include leather, shoes, lumber, and textiles.

Novi Sad is the center of a rich farming district and has the country's largest produce exchange. It is an alternative location to Belgrade for an agency handling agricultural machinery. It is also an important industrial center, local industries including milling, confectionery, canning, soap, chemicals, electrical equipment, etc.

Sušak, Split (Spalato), and Dubrovnik (Ragusa) are, in order of importance, the chief Yugoslav ports.

Commercial language.—German is almost exclusively used for commercial purposes. French is understood to some extent, but the use of English is very limited.

American commercial and consular offices.—Commercial attaché, Belgrade; consul, Belgrade, Zagreb.

APPENDIX

PUBLICATIONS OF BUREAU OF FOREIGN AND DOMESTIC COMMERCE OF PROBABLE INTEREST

The following publications (except special circulars) may be obtained at prices noted from the Superintendent of Documents, Government Printing Office, Washington, D. C., or from any of the district offices of the Bureau of Foreign and Domestic Commerce. Special circulars may be obtained from the Bureau direct or from the district offices.

The following lists suggests a few titles only. A complete catalogue will be sent on application.

General:

- The Commerce Yearbook, 1932, Vol. II, Foreign Countries. \$1.25.
- Living costs for Americans Abroad. Special circulars, Division of Regional Information. Available for all European countries. 10 cents each.
- Selecting Foreign Sales Agents. Special circular, Commercial Intelligence Division. Free.
- Exclusive Sales Agreements in Foreign Trade. Trade Promotion Series No. 45. 10 cents.
- Shipment of Samples and Advertising Matter Abroad, Including Use of the Mails in Foreign Trade. Trade Promotion Series No. 72. \$1.
- International Fairs and Expositions. Trade Promotion Series No. 75. 20 cents.
- Ocean Routes in United States Foreign Trade. Trade Promotion Series No. 96. 10 cents.
- Commercial Travelers' Guide to Latin America. Trade Promotion Series No. 122. \$1.25.
- Credit and Payment Terms in Foreign Countries. Trade Promotion Series No. 123. 20 cents.
- Commercial Travelers' Guide to the Far East. Trade Promotion Series No. 134. \$1.
- Sources of Foreign Credit Information. Trade Information Bulletin No. 292. 10 cents.
- Uniform Through Export Bill of Lading. Trade Information Bulletin No. 593. 10 cents.
- Broadcast Advertising in Europe. Trade Information Bulletin No. 787. 10 cents.

Baltic States:

- The Baltic States. Trade Information Bulletin No. 569. 10 cents. (Out of print; loan copy on request.)

Belgium-Luxembourg:

- Competitive Factors in Selling to Belgium and Netherlands. Trade Information Bulletin No. 356. 10 cents.
- Luxembourg: Brief Economic Survey. Trade Information Bulletin No. 559. 10 cents.

Czechoslovakia:

- Trading Under the Laws of Czechoslovakia. Trade Information Bulletin No. 444. 10 cents.

Finland:

- Finland: Economic Review. Trade Information Bulletin No. 681. 10 cents.

France:

- Guide for American Business in France. Trade Promotion Series No. 115. 15 cents.
 Taxation of Business in France. Trade Promotion Series No. 118. 20 cents.

Germany:

- Port of Hamburg, Including Ports of Altona and Cuxhaven. Foreign Port Series No. 1. \$1.

Greece:

- Business Practice in Greece. Trade Information Bulletin No. 472. 10 cents.
 Trade Financing and Exchange in Egypt, Greece, and Turkey. Trade Information Bulletin No. 506. 10 cents.

Irish Free State:

- Irish Free State: An Economic Survey. Trade Promotion Series No. 62. 20 cents.

Italy:

- Power-Using Industries of Italy. Trade Information Bulletin No. 772. 10 cents.

Netherlands:

- Competitive Factors in Selling to Belgium and Netherlands. Trade Information Bulletin No. 356. 10 cents.

Portugal:

- Portugal: Resources, Economic Conditions, Trade and Finance. Trade Information Bulletin No. 455. 10 cents.
 Portuguese Taxation, Corporations, and Negotiable Instruments. Trade Information Bulletin No. 765. 10 cents.

Switzerland:

- Taxation of Business in Switzerland. Trade Promotion Series No. 47. 5 cents.
 Switzerland: Resources, Industries and Trade. Trade Information Bulletin No. 421. 10 cents.

Turkey:

- Trade Financing and Exchange in Egypt, Greece, and Turkey. Trade Information Bulletin No. 506. 10 cents.

United Kingdom:

- Taxation of Business in Great Britain. Trade Promotion Series No. 60. 20 cents.
 United Kingdom: An Industrial, Commercial, and Financial Handbook. Trade Promotion Series No. 94. \$1.75.
 Chain-Store Developments in Great Britain. Trade Information Bulletin No. 697. 10 cents.
 Port of Liverpool, Including Birkenhead and Garston. Foreign Port Series No. 2. \$1.

Yugoslavia:

- Kingdom of Serbs, Croats, and Slovenes (Yugoslavia): A Commercial and Industrial Handbook. Trade Promotion Series No. 61. 85 cents.

ASSISTANCE AVAILABLE IN SELECTION OF FOREIGN AGENTS

The Bureau of Foreign and Domestic Commerce has on file a large amount of information on foreign agents of various types in all countries, which is kept up to date through the activity of the foreign services of the United States Departments of Commerce and State. Investigations as to the suitability of sales agents, wherever located, is undertaken for American exporters. When the assistance of the

bureau is desired in this connection, it is important that complete information be submitted, as follows:

(a) Type of merchandise to be sold. (This can best be known if catalogues and descriptive literature are received.)

(b) Full price data and complete discounts. (If there is a cash discount, state how the foreign buyer can take advantage of such discount.)

(c) Are you disposed to extend buying terms common to the market to foreign firms of unquestioned financial standing? (If your terms are rigid as to credit, indicate such terms.)

(d) Are your quotations made f. o. b. factory or port of exit, or free alongside steamer at port of exit? Are all carrying charges from your f. o. b. point for the account of the buyer, or do you absorb them in the price of your goods?

(e) Compensation to the agent should be stated, whether this be commission or special discount.

(f) Are you disposed to assist the agent in the sale of your products by advertising at your expense, if such advertising seems expedient, or by contributing to any necessary expense?

(g) Are you selling in the market or markets under review or have you sold in those markets? If so, through whom and to what extent? (Be sure to mention if you already have an agency arrangement and the reason for wishing to make a change.)

(h) If your products are unknown in the markets where you want sales-agency representation, the bureau should have basic information regarding your business organization, such as the age of your concern, capital, banking connections, how long you have been exporting, as well as other pertinent information about your organization of interest to a prospective sales agent.

