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THE
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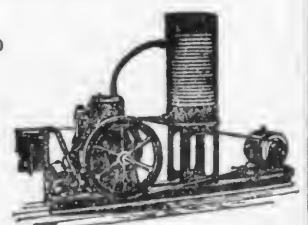
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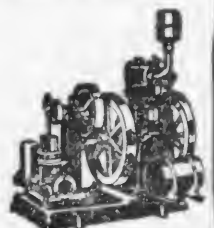
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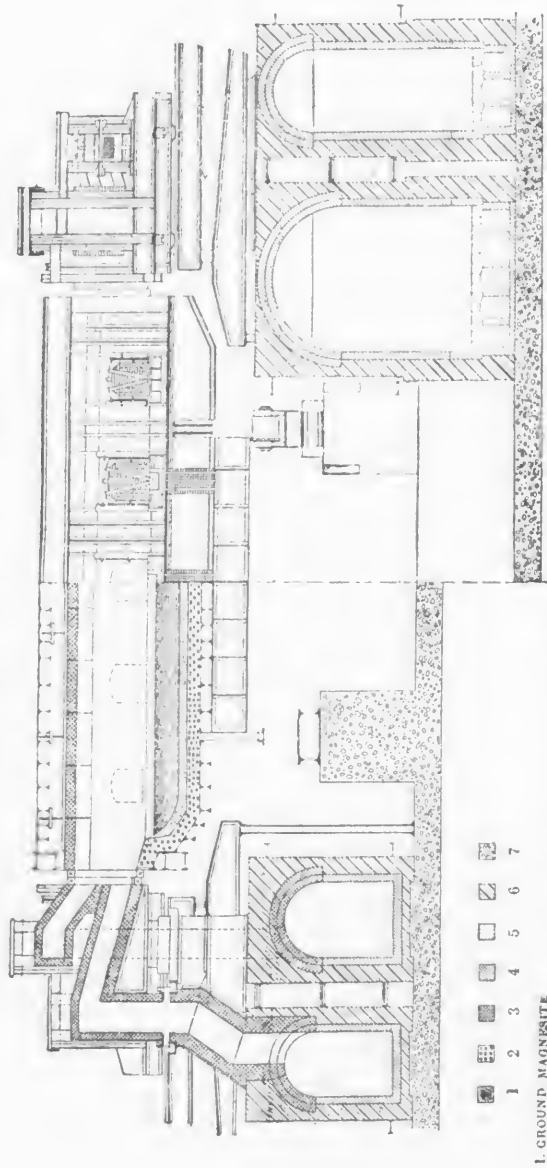
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Binocular Glass Manufacturers—

Ross' Optical Works, 3, North Side, Clapham Common, S.W.

Binoxide of Barium—

Hedworth Barium Co., Ltd., Newcastle.

Stacking (Nubian) Black and Brown—

The Nubian Manufacturing Co., Lorrimer Street, S.E.

Blankets and Rugs—

Leopold, Frank, 1 and 2, Addle Street, London, E.C.

Blasting Gelatine and Gellignite—

Curtis & Harvey, Cannon Street House, London, E.C. 4.

Nobel's Explosives Co., Nobel House, 185, West George Street, Glasgow.

Bleaching Powder—

Barr, James C., Ltd., Chemical and Colour Merchants, 27, Blythwood Square, Glasgow.

Brunner, Mond & Co., Northwich, Cheshire. Electro Bleach and By-Products, Ltd., Middlewich, Cheshire.

Boats (Seamless Steel LHS Boats and Motor Boats)—

Seamless Steel Boat Co., Ltd., Wakefield.

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Howden, J., & Co., Ltd., 185, Scotland Street, Glasgow.

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The Nubian Manufacturing Co., Lorrimer Street, London, S.E.

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Giles, John, & Sons, Ltd., Bristol, Telegraphic Address: "Giles, Bristol." Makers of the "Giles" Boot Protectors and Hob Nails.

Boots and Shoes—

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Clifford, Charles, & Son, Ltd., Birmingham.

Briar Pipes and Tobacconists' Fancy Goods—

Perkins, H., & Sons, Ltd., Compton Works, 33, Compton Street, Goswell Road, London, E.C.

Bridges, Suspension—

Cradoek, G., & Co., Ltd., Wakefield, England.

Briquettes (See Patent Fuel)—

The Crown Preserved Coal Co., Ltd., Cardiff.

Brush and Broom Manufacturers—

Ludbrooke, S., & Co., Ltd., Mile End, London.

Brush Making Machinery—

Hill & Herbert, Ltd., All British Works, Leicester.

Brush Making Materials—

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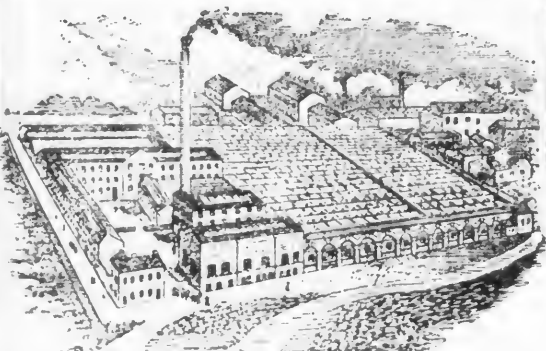
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Buttons (Fancy, of all kinds)—

Barber, J., & Co., Ltd., 2, St. George's Crescent, Brearley Street, Birmingham.

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Cables and Wires—

Glover, W. T., & Co., Ltd., Trafford Park, Manchester.

Henley's, W. T., Telegraph Works Co., Ltd., London, E.C.

Hooper's Telegraph and India-Rubber Works, Ltd., London, E.C.

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Craddock, G., & Co., Ltd., Wakefield, England.

Calcium Carbide—

Acetylene Corporation, Ltd., 49, Victoria Street, Westminster, London.

Bingham, Charles, & Co., 11, Queen Victoria Street, London, E.C. Works:—Manchester, England, and Notodden, Norway.

Imperial Light, Ltd., 123, Victoria Street, London, S.W.

Camera and Shutter Manufacturers—

Ross' Optical Works, 3, North Side, Clapham Common, S.W.

Thornton-Pickard Manufacturing Co., Ltd., Altrincham, England. Telegraphic Address: "Pickard, Altrincham." Telephone number: 69 Altrincham.

Candle Manufacturers—

Price's Patent Candle Co., Ltd., Belmont Works, Battersea, London, S.W.

Candle Shades—

Henry Wolf & Co., 13, Bunhill Row, London, E.C. 1.

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Bright, John, & Bros., Ltd., Rochdale.

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Barr, James C., Ltd., Chemical and Colour Merchants 27, Blythswood Square, Glasgow.

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Chemical and Dye Plant—
Chemical Engineering Co., 49, Deanegate, Manchester. Telegrams: "Calling, Manchester."

Chemical Manufacturers—
Anglo-Continental Guano Works, Ltd., Dock House, Billeter Street, E.C.
Blythe, Wm., & Co., Ltd., Church, Lanca.
Boots Pure Drug Co., Ltd., The Laboratories, Nottingham, Contractors to H.M. Government. Manufacturers of Acetyl Salicylic Acid, Atropin, Beta Eucaine, Chloral formamide, Chloramine-T, Chloroform, Digitalin, Hexamine, Homatropin, Hyocine Hydrobromide, Paraldehyde, Phenacetin, Phenazone Salicylate, Saccharin, Salol, Theobrom, Soda Salicyl, etc., etc. 'Phone, 3160. Telegrams: Drug, Nottingham.
British Dyes, Ltd., Huddersfield.
Brunner, Mond & Co., Ltd., Northwich, Cheshire.

Electro Bleach and By-Products, Ltd., Middlewich, Cheshire.

Hedworth Barium Co., Ltd., Newcastle.

McDougall Brothers, Ltd., 66/68, Port Street, Manchester. Sheep Dips and Cattle Dressings, Arsenite of Soda, Veterinary Preparations, Disinfectants of all kinds, Fruit Tree Washes and Weed Killers, etc.

Riley, John, & Sons, Ltd., Hapton, Lancashire.

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Cross, Alexander, & Sons, Ltd., 10, Hope Street, Glasgow.

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Scott, George, & Son (London), Ltd., Kingsway House, Kingsway, London, W.C.

China Clay—

Lovering, John, & Co., St. Austell.

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Jones, G. E., 79, 81 and 81A, Mortimer Road, Kingsland, London, N.

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Cory Bros. & Co., Ltd., Cardiff.

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British Dyes, Ltd., Huddersfield.

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Miller, Jas., & Co., 79, West Nile Street, Glasgow.

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Newalls Insulation Company, Ltd., Newcastle-upon-Tyne, and branches.

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Compasses (Magnetic)—

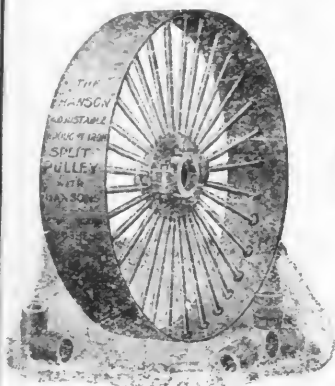
Barker, F., & Son, 12, Clerkenwell Road, E.C.

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- Copper Taps, Wire Ropes, &c.—**
Henley's, W. T., Telegraph Works Co., Ltd., London, E.C.
- Cork Insulation—**
Newalls Insulation Company, Ltd., New castle-upon-Tyne, and branches.
- Costumes—**
Heatons (Leeds), Ltd., Heatons Buildings, North Street, Leeds. Ladies' and Maids' Tailor-Made Costumes, Coats and Skirts. Registered Trade Marks: "Alwetha" Rain-coats, "ESIV" Serges.
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Judge, T. & W., London, S.E.
- Cotton Cleaning Waste—**
Spencer & Curedale, Ltd., Bury Ground Works, Bury.
- Cotton Driving Ropes—**
Hart, Thomas, 12 and 14, Town Hall St. Blackburn; Lambeth Rope Works, Blackburn. Telephone: 10. Blackburn. Telegraphic Address, "Hart, Blackburn."
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- Decklights and Parhelio Glasses—**
Stavans, James, & Son, Victoria Glass Works, Birmingham.
- Decorative Tiles—**
Carter & Co., Ltd., Encaustic Tile Works, Poole.
- Dentists' Materials Manufacturers—**
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Telegrams: "DUNNS, MANCHESTER."
Codes: A. B. C. (4th & 5th Editions); A. B. C. (5 letters); LIEBERS; LIEBERS (5 letters).
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TELEGRAMS { "Advantage, Stock, London."
CODE: A.B.C., 5th Edition.

TELEPHONES { London Wall, 4713 and 4717.
(Private Branch Exchange.)

DIRECT COMMUNICATION WITH TRADERS.

The DEPARTMENT OF OVERSEAS TRADE (DEVELOPMENT AND INTELLIGENCE) is a centre at which information on all subjects of commercial interest is collected and classified in a form convenient for reference, and at which, so far as the interests of British trade permit, replies are given to enquiries by traders on commercial matters. As far as is possible, the Department supplies, on personal or written application, information with regard to the following subjects: Foreign and Colonial Contracts open to Tender, and other openings for British Trade; Lists of manufacturers at home and lists of firms abroad engaged in particular lines of business in different localities; Foreign and Colonial Tariff and Customs Regulations; Commercial Statistics; Forms of Certificates of Origin; Regulations concerning Commercial Travellers; Sources of Supply, Prices, etc., of Trade Products; Shipping and Transport, etc.

Samples of foreign competitive goods and commercial products which are received from abroad from time to time are exhibited at the Offices of the Department.

Samples of goods of German and Austrian manufacture which were sold in British markets abroad and in certain foreign markets are on exhibition in the Sample Rooms of the Department.

The BRITISH INDUSTRIES FAIR, 1918, is being held in the Pennington Street premises of the London Docks, which

have been placed at the disposal of the Board of Trade by the Port of London Authority. It was opened on 11th March and will continue until 22nd March. The office dealing with Fair matters is at 10, Basinghall Street, London, E.C. 2.

In order that British manufacturers may have an opportunity of familiarising themselves with German and Austrian methods of advertising, the Board of Trade have collected over 9,500 SPECIMEN CATALOGUES OF GERMAN AND AUSTRIAN ORIGIN, and these may be inspected by British manufacturers at the Department of Overseas Trade (Development and Intelligence), 10, Basinghall Street, London, E.C. 2.

A new index has been prepared, in which the catalogues are classified both as regards articles of manufacture and names of manufacturers, thus rendering identification of any particular catalogue a simple matter. Copies of this index may be obtained by United Kingdom manufacturers on application to the Comptroller-General, Department of Overseas Trade (Development and Intelligence), 73, Basinghall Street, London, E.C. 2.

All communications intended for the Department of Overseas Trade (Development and Intelligence) should be addressed to: **The Comptroller-General, Department of Overseas Trade (Development and Intelligence), 73, Basinghall Street, London, E.C. 2.**

OPENINGS FOR TRADE AND NAMES OF TRADERS IN COUNTRIES ABROAD.

Confidential Information.

SPECIAL REGISTER.

The Special Register affords early information to manufacturers and traders of new trade openings abroad before they become public property. It is also a vehicle for circulating reports on foreign competition, and any other matters likely to be of importance and interest to particular trades. The information, which is private and confidential, is supplied to the Department by His Majesty's Trade Commissioners within the Empire, and by His Majesty's Diplomatic and Consular Representatives in foreign countries, and is circulated to firms on the Register as quickly as possible after its receipt.

The Register is open to any approved British firm on the payment of a fee of two guineas per annum (which includes the annual subscription to the "Board of Trade Journal"). It is not open to non-British traders.

Information is supplied solely for the purpose of extending trade in British-made goods.

Those British firms who desire their names to be included in the Special Register should communicate with **The Comptroller-General, Department of Overseas Trade (Development and Intelligence), 73, Basinghall Street, London, E.C. 2.**

FORM K.

H.M. Consular Officers have received instructions to furnish the Department of Overseas Trade (Development and Intelligence) with commercial information respecting all firms in their respective Consular Districts who can be recommended as possible importers of goods of British manufacture. This

information, which includes the commercial and financial status of the firms concerned, their local and European references, goods particularly required, terms of trading and language in which correspondence should be carried on, is furnished to the Department on a prescribed form, which is known as **Form K**.

In order to obtain the fullest possible advantages from the "Form K" system of information a wide circulation is ESSENTIAL.

A system of co-operation between the Department of Overseas Trade (Development and Intelligence) and British traders is therefore necessary, and this co-operation is being attained as follows:—

1. The Department collects and edits the information.
2. The Trade Associations distribute the information.

That is, the Department issues the information to—
(a) The Association of Chambers of Commerce.
(b) The Federation of British Industries.

The bodies comprised in these organisations have their various component trades classified as shown in "Form K," and lists of traders are therefore only circulated to those firms which come under that classification, thus avoiding circulation to trades which are not interested.

The system is safeguarded by agreements with the distributing organisations against the issue of the information to any outside firms. All firms who wish to receive the information have to be approved by the Department. At present over 10,000 firms have joined, and any other firms who wish to participate should apply through their Chamber of Commerce or the Federation of British Industries (39, St. James's Street, London, S.W. 1), or through bodies affiliated to the latter, such

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The Board of Trade.

APPOINTMENT OF PAPER CONTROLLER.

It has been decided to substitute a Controller of Paper for the Royal Commission which has been the authority controlling the supply and distribution of paper. Sir Albert Stanley has, therefore, appointed Mr. H. A. Vernet to be Controller.

The Paper Controller will for the present occupy the Offices hitherto used by the Paper Commission at Central House, Kingsway, London, W.C. 2, but as from the 1st March he will occupy premises at 23, Buckingham Gate, London, S.W. 1.

In the "Government Notices" Section of this issue will be found the text of the Controller of Paper Order, 1918, which was issued on 9th March. In this Order it is stated that the Royal Commission on Paper was dissolved by Royal Warrant on 8th March. The Order confers upon the Controller of Paper all the powers heretofore exercised by the Royal Commission on Paper, and adds:—"Where any Order respecting paper or paper making materials heretofore made gives power to the Board of Trade to grant licences dispensing with any of the provisions of such Order, such licence may be granted on behalf of the Board of Trade by the Controller of Paper, unless the Board otherwise direct."

In the same Section appears the Paper Making Materials (Home Produced) Order, 1918, dated 13th March. This order provides that on and after 1st April of this year no person, without a permit, shall sell or offer for sale any paper-making material produced or collected in the United Kingdom. Provision is also made for regulating supplies by dealers to customers and the prices to be charged. Certain materials are excepted from the scope of the Order until included by notice from the Controller of Paper.

TRADE WITH THE UNITED STATES.

THE NEW RESTRICTIONS.

The attention of the public should once again be drawn to the further restrictions on Trans-Atlantic trade which it has been found necessary to impose in order to secure that the existing tonnage accommodation shall be used to the best advantage to the Allies. The action, which has hitherto been taken by the European Allies has consisted mainly in the establishment in their respective countries of Prohibitions of Import, which, of course, provide for the issue of licences for goods the continued import of which is necessary. In the autumn the United States, in order to conserve the supply of goods which were both necessary for the war and limited in quantity, prohibited exports of certain categories by means of what was called the "Conservation List." They have now felt compelled to place a general restriction not only on all exports, but also on the placing of orders for goods by private firms. Except under licence from the Government of an importing country, no private firms may import goods from the United States or place orders for goods.

WHAT THE UNITED STATES HAVE DONE.

Hitherto the problem of importing goods from the United States has been due almost entirely to the difficulties of the shipping situation, but difficulties which owe their origin to internal conditions in the United States have constituted a new incentive to action by the United States Government. The congestion on the American railroads, which was greatly enhanced—if, indeed, it was not entirely caused—by the extremely severe winter in America, has so greatly hampered the movement of goods from factory to depot and from depot to port, that drastic measures for its alleviation have become necessary. The United States have accordingly intimated that not only will the export of all goods of United States origin and manufacture to the Allies in Europe be forbidden except under

THE BOARD OF TRADE—continued.

licence, but that no licence will be issued for export unless the fact that the goods are urgently required by the Allies is vouched for by the Government of the importing country. The American Government, as already indicated, have gone a step further even than this. They have noted that many private orders are being placed by private firms in the United States far in excess of the probable opportunities of shipping them, and they have decided to prevent the wasteful manufacture of goods for which there is little likelihood that shipping facilities can be provided in the near future. It has accordingly been decided that no orders for the supply of goods from the United States shall be placed without ratification by the importing country. The embargo is now in operation.

THE MACHINERY IN OPERATION.

Whenever it is desired by private firms and companies to order goods, whether for private trade or eventually to be used in the performance of Government contracts, the procedure is for the importing firm to apply to the Department of Import Restrictions of the Board of Trade, 22, Carlisle Place, S.W. 1, giving full particulars of the orders which they propose to place and the purposes for which the goods are required. The Department of Import Restrictions, after proper consideration of all the circumstances, will decide whether the goods are such that the support of His Majesty's Government should be given to the application, and, if so advised will give to the applicants a numbered permit. The applicants must thereupon communicate the number of their permit to their American suppliers, whose business it will then be to approach their own authorities with a view to getting the order approved. If the American authorities approve the order, such approval will carry with it the issue of an export licence, although it will not necessarily guarantee the provision of shipping space. In the case of goods already on the Import Prohibition List of the United Kingdom, the issue of a permit will be automatically followed by the issue of an import licence if and when the goods arrive, but the issue of the permit will hereafter be necessary for all goods purchased on private account, whether they are import prohibited or not.

OPENING OF THE BRITISH INDUSTRIES FAIR.

INTEREST OF TRADE BUYERS.

Manufacturers and buyers in certain lines of business have been brought together this week at the British Industries Fair which was opened on Monday at the Pennington Street premises of the London Dock.

This Fair—the fourth organised by the Board of Trade since the outbreak of war—will continue until 22nd March. Already its popularity in the trades concerned, as shown by the number and keen interest of the visitors (all of whom are business men, bent on business and not pleasure), proves that it can perform certain functions which cannot be as satisfactorily and as conveniently performed under the complexities of modern business by any other means. Its popularity, too, promises further developments and its extension in normal times to cover British Manufactures which cannot for various causes be represented this year.

A STRICTLY BUSINESS FAIR.

Among the functions referred to, the foremost is, of course, "Business"—a Fair organised for the sole purpose of promoting business, and restricted severely to business men—the manufacturer, on the one hand, presenting his annual dis-

THE BOARD OF TRADE—continued.

play of up-to-date goods available for sale, and the buyer, on the other, who is constantly feeling the pulse of public demand, making his selections and giving his orders to keep the factories going until the next Fair. The British Industries Fair can therefore be summarised as a means of affording facilities on a large and systematic scale for personal business interviews between manufacturers and buyers in the presence of the new productions for the year. For this reason the general public are excluded. Its object being solely "to do business," the Fair will continue, it is hoped, to draw buyers in increasing numbers, not only from the United Kingdom, but from our Overseas Dominions and Possessions, and the great foreign markets of the world.

This year the Fair has been confined to articles produced in the following trades:—

- Earthenware, porcelain and china trades, glass and glass ware.
- Fancy goods.
- Stationery and printing trades.
- Paper.
- Toys and games.

BUSINESS ON THE OPENING DAY.

A visit on the opening day revealed the large scale on which it is being conducted. It covers the floor space of two large warehouses in the Docks, and affords accommodation for 424 firms. These are divided among the various sections as follows:

Glass, china and earthenware	...	71
Paper, printing and stationery	...	85
Toys	...	175
Fancy goods	...	93

The number of buyers who attended on the opening day, Monday, 11th March, was quite satisfactory. Undoubtedly more business was transacted than on the opening day of the last Fair, and some firms received considerable orders. In spite of the difficulties connected with railway transport, it is gratifying to note that practically all the exhibitors have received their samples; and, in fact, there are only two or three firms whose exhibits have been delayed in transit, and it is hoped that these will arrive at any moment.

PETROL LICENCES.

DETAILS OF THE FOURTH ISSUE.

In the article published on 7th February, descriptive of the Petrol Control Department's work, figures were given showing the number of licences granted to each class of user of motor spirit since the Department was formed. At that date the new licences (Fourth Issue) for doctors' cars had not been granted, and the licences in other sections of this Fourth Issue had not been completed. At no date can it be definitely stated that the licences for any class of user are complete, since applications are being considered every day. The figures given below show the total number of licences up to 28th February granted in the Fourth Issue. The numbers granted in the previous issues are given for comparison:—

	Licences Issued,			
	1st issue	2nd issue	3rd issue	4th issue to 28th Feb., 1918.
Private cars ...	94,111	84,610	70,452	54,719
Private cycles ...	95,098	48,580	84,462	27,303
Doctors' cars ...	14,636	11,966	10,250	9,050
Hackney vehicles ...	22,189	19,061	16,351	14,655
Commercial vehicles...	35,677	32,290	38,880	31,706
Industrial processes...	44,303	41,375	60,061	51,256
Total ...	306,014	237,882	230,456	188,689

THE BOARD OF TRADE—continued.

VISIT OF H.M. TRADE COMMISSIONER (SOUTH AFRICA) TO THE UNITED KINGDOM.

The experience of previous visits of H.M. Trade Commissioners to the United Kingdom is being borne out by the number of firms and Chambers of Commerce which have already expressed their desire to consult with Mr. Wickham (H.M. Trade Commissioner in South Africa) on his approaching visit to this country. Among the matters in regard to which he is prepared to give information and advice are the steps to be taken for opening up or extending trade in South Africa, both at the present time (if circumstances permit), or in order to make arrangements for trade after the war, the general state of trade in South Africa, appointment of agents, methods of marketing and distribution, terms of payment, names of probable buyers of British goods, statistics of imports, and rates of Customs duties.

Mr. W. G. Wickham is expected to arrive in the United Kingdom in April, and will be prepared to interview (by appointment) representatives of those firms who may be able to see him in London at the Offices of the Department of Overseas Trade (Development and Intelligence) for several weeks soon after Easter. He will then visit such trade and industrial centres in the United Kingdom as it may appear most advantageous to visit in view of applications that may be received from firms in or near those centres, and from Chambers of Commerce. These centres will probably include, in the order named, as on the occasion of previous visits of Trade Commissioners, Bristol and South Wales, Birmingham and District, the Potteries, Manchester, Liverpool, Ireland, Scotland, Newcastle, Yorkshire, Nottingham and Leicester. Other centres will also be visited in the event of a sufficient number of applications for interviews being received.

In order that appointments may be satisfactorily arranged, firms desiring to have an interview with Mr. Wickham are requested to make their application as soon as possible, and in any case not later than the 1st April in the case of London, and the 15th April in the case of the Provinces. Applications should be addressed to the Comptroller-General, Department of Overseas Trade (Development and Intelligence), 73, Basinghall Street, London, E.C. 2. The reference number (D.O.T. 2573/15) should be quoted.

H.M. TRADE COMMISSIONER AT SINGAPORE.

Mr. P. J. McKellen, who has been appointed H.M. Trade Commissioner at Singapore, is expected to leave this country during next week, to take up his appointment at that centre. Firms desirous of communicating with him should address their communications to H.M. Trade Commissioner, Singapore, Straits Settlements.

IRISH CANAL CONTROL SUB-COMMITTEE.

The President of the Board of Trade stated in the House of Commons on the 7th March that the canals in Ireland which are under the control of the Board of Trade, have been placed by the Canal Control Committee under an Irish Sub-Committee. The Sub-Committee consists of the following members:—Sir George A. Stevenson, K.C.V., C.V.O., Sir John Purser Griffith, M.Inst.C.E., the Right Hon. Jonathan Hogg, Mr. W. R. Rea, and the Right Hon. Laurence Waldron.

Special Articles.

AFTER-WAR TRADE.

REPORTS OF THE DEPARTMENTAL COMMITTEES.

IX.—FINANCIAL FACILITIES FOR TRADE.

With the foundation of the British Trade Corporation, a step was taken in the direction of affording to trade wider facilities for financial assistance. Its operations are as yet in the initial stage, but an indication of its possibilities is supplied by the Departmental Committees in their survey of the gaps that exist in many industries between finance on the one hand, and trade and manufactures on the other.

ELECTRICAL TRADES.

While every industry requires for its development the outlay of new capital, that of electrical manufacturing is perhaps more dependent than any other on the help of a powerful financial system. The major part of its activity is connected with enterprises involving heavy expenditure which may not become immediately remunerative, and the concessionaire, inventor, contractor, or manufacturer must, therefore, for such projects as the construction of a new electric railway, the electrification of an existing line, the introduction of new processes and apparatus, or the equipment or extension of a generating or transmission system, have facilities for recourse to financial organisations prepared to stand a temporary lock-up of capital of considerable magnitude. The Electrical Trades Committee state that: "In Great Britain such facilities do not exist in an adequate degree. Though she is the financial centre of the world, and can claim to be the pioneer in modern engineering, there has never been created any organised co-operation between her finance and her manufacture."

So far as British Joint Stock Banks are concerned, the Committee consider that their liabilities to the public, large as compared with their capital, forbid their lending, except with a safe margin and on security readily realisable. It is outside the province of such institutions to provide money for an enterprise, whether at home or abroad, involving a heavy and possibly a long immobilisation of funds.

In Germany the conditions are totally different. There, a thoroughly organised alliance, offensive and defensive, has been elaborated between manufacture and finance. Banks and manufacturing concerns have common directors, and on the boards of both there sit technical and commercial experts. The banks link themselves together to provide facilities for industrial expansion, and co-operate with each other and with the great manufacturers in forming subsidiary banks and financial institutions for special purposes. The German financiers do not, at the start, attempt to place an enterprise on the market, as is the practice in England. Guided always by expert advice, they seldom touch a project in itself unsound. They find the money themselves or through their allied groups, and, not afraid of a lock-up of capital, wait till success is shown before they unload on the public.

The attention of the Electrical Trades Committee was drawn to the balance-sheets for the year 1915 of the Allgemeine Electricitäts Gesellschaft, the Siemens-Schuckert Company, and the Bergmann Company, which show cash balances of 6½, 2½, and 1½ millions sterling, respectively. "This accumulation of funds," they consider, "is recognised as ready and available for peace projects, and the fact emphasises the necessity for financial assistance being at the disposal of British manufacturers."

"The Electrical Trades Committee is strongly of opinion that the establishment of industrial banks is essential. Such institutions assisted by the advice of expert assessors, would help to protect the public against unsound speculative ventures,

SPECIAL ARTICLES—continued.

and would exercise a profound influence in placing industrial enterprise on a stronger financial basis."

SHIPBUILDING AND MARINE ENGINEERING.

Written replies made by Shipbuilding and Marine Engineering firms, and evidence given before the Shipping and Shipbuilding Industries Committee, indicated that the support afforded by financial institutions to British Shipbuilders and Marine Engineers has been fairly good for home business, but a few cases were reported where foreign banks have given greater facilities to their customers, either with or without the support of their Governments.

The Committee summarise the situation by stating:

Although there are exceptions, it appears, generally speaking, that while the majority of shipbuilding firms in this country have given long credits of from one to five years, or even more, to their British customers, they have usually insisted on being paid cash in their foreign business. One witness stated that while foreign shipowners in the past paid cash, for a few years prior to the war they were asking for terms for a small portion of the contract price. Some German builders, supported by their banks, have undoubtedly been willing to take greater risks in promoting their foreign business than British shipbuilders were prepared to take, and witnesses have expressed the view that a British trade bank or banks, formed with Government support to give credit over longer periods than British banks usually do, would greatly assist in maintaining and extending British industries abroad. We entirely concur in this view.

We hope that the needs of the situation will be met to a considerable extent by the British Trade Corporation which has now been set up.

THE TEXTILE TRADES.

The textile trades, owing to the character of their business, probably present fewer difficulties of finance than any of the other great groups of trades. Many of the complaints which have been made with regard to the want of close co-operation in the past between British industry and British finance—for instance, in connection with large engineering contracts—do not apply to the textile trades, in which the majority of individual transactions are comparatively small.

The Committee on the Textile Trades were satisfied that importers of raw material, spinners, manufacturers, and others engaged in the textile trades, as a rule receive adequate facilities from existing banks and financial institutions for financing their business. Industrial finance in the textile centres is largely in the hands of local banks, which specialise on local business, thoroughly understand the requirements of their clients, and afford all reasonable facilities.

Again, the export trade to the large overseas markets, such as India, China, the Far East, South America, and Turkey is very largely financed by British banks operating in those countries, and so long as the present system of short terms of credit is maintained, the facilities given appear to the Textile Trades Committee to meet all legitimate requirements.

Increased financial facilities, however, would be welcomed to deal with the following situation. The Committee state:—

Not a few witnesses expressed the opinion that if business upon a large scale is to be developed in Russia, special financial facilities will have to be afforded to meet the system of long credits, which cannot be avoided in that country. Many British textile firms have been deterred from doing business with Russia in the past, and have preferred to use the intermediary of German merchant houses because of the difficulty they experienced in handling Russian commercial paper.

It is alleged that German distributing houses in Russia, the Levant, and Central and South America have been able to offer extended terms of credit and thereby to obtain a considerable amount of trade, owing to the support they receive from their banks. The bills drawn upon clients in these markets eventually find their way to London. They are endorsed by the German banks, upon whose endorsements they are readily discounted in the London market. In effect, therefore, the longer credits given by German merchants rested ultimately upon British finance. British merchants complain that the facilities thus afforded to their German rivals by London financial houses have had the effect of actively promoting German competi-

SPECIAL ARTICLES—*continued.*

tion in the marketing of textiles. If extended credit becomes an established practice in important markets, means must be found, either by our existing banks or otherwise, to provide facilities to British exporters and merchants at least equal to those which have been afforded to German merchants.

THE ENGINEERING TRADES.

In the Engineering Trades, evidence showed that much of the competition which this country meets with in its endeavour to supply goods abroad is due to lack of credit given by British concerns to foreign purchasers. The result is that where an order is placed in the United Kingdom a merchant firm operating in the foreign country concerned has very often to intervene in the matter, to provide temporarily the capital required, and, naturally, in consequence, to load the transaction with a further profit. The Committee dealing with the Engineering Trades explains that German banks stand upon a different footing to British banks. These banks are more in the nature of finance institutions than banks as we understand them, often running part of the risk and taking part of the profit. They add:—

We have studied the report of Lord Faringdon's Committee on Financial Facilities for Trade, and we agree that such a bank as the British Trade Bank advocated by the Committee would afford important trade facilities and materially encourage the export trade of this country. The manufacturer could afford to pay a substantial rate of interest for the facility afforded, because the elimination of the foreign merchant house, with its dearly available capital, would properly avoid the charging of an additional profit, and thereby cheapen the product to the purchaser.

We have seen with great interest the announcement that, arising out of the Report of Lord Faringdon's Committee, which we note has the support of the Government, a British Trade Corporation is to be established, which is to be given a Charter, and will have for its object to facilitate and establish a large credit bank or banks for developing British trade abroad.

We agree that there is ample room for such an institution in this country which should not interfere with the operations of the British Joint Stock Banks or any British banks abroad, but should offer facilities for industry and trade which the present banking institutions were, perhaps, not capable of doing.

We note with interest and approval that the Corporation is to have on its Board representatives of industry and commerce and have associated with it men expert in the various industries and possessed of a wide knowledge of the world and its affairs.

The further proposal to attach to the Corporation an Information Bureau and Intelligence Department capable of examining new projects and of extending credit, if needed, should prove of great assistance to the expansion of British enterprise, both at home and abroad.

With regard to credit, generally, there is some evidence that this has been restricted by the amalgamation of many small country banks with the large joint stock institutions; the borrower is out of touch with the real lender. The branch bank manager, who takes the place of the older proprietors, has often very restricted powers and is not free to exercise his own individual judgment. Consequent upon the absorption of these small private banks the obtaining of credit was becoming more difficult. This is, however, to some extent mitigated by those banks who have established Local Boards.

German Credit Insurance.

It has been brought to our notice by several witnesses, though we have not been able to obtain any reliable details on the subject, that there exists in Germany a form of insurance company which is willing, for a commission of about 4 per cent., to guarantee approved long-dated bills of foreign trade. Thus, for instance, this German company is said to guarantee to the German manufacturer's the due payment of bills accepted by Russian purchasers.

The existence of such a financial institution would, undoubtedly, facilitate the granting of credit in the export trade. The insurance company would be able, by its agents and branches, to have on its books firms in foreign countries to whom they would be able to give an insurance credit of a certain amount, so that the intending purchaser at the time of his purchase, would be able to say that the credit asked for would be guaranteed. The endorsement by the insurance company of the bills given would make them largely marketable securities, and would, when they ap-

SPECIAL ARTICLES—*continued.*

proached the last six months of maturity, bring them as negotiable instruments within the discounting purview of the ordinary joint stock bank. The functions of such an insurance company could well be covered by the British Trade Bank. It is a business which requires the greatest care and skill, but should be quite possible of attainment. The main objection would be that a firm of standing asking for credit would probably not be willing to consider that they should be guaranteed, because, in fact, the cost of the guarantee would fall upon their purchase. We attach great importance to the establishment of the finest possible Financial Intelligence Department in connection with the proposed British Trade Corporation, so that traders in this country and the Colonies may not be dependent on competing countries for information which is absolutely essential if credit is to be given with reasonable safety.

THE PROBLEM OF TIMBER.

II.—UTILISING OUR HOME WOODS.

In a previous article the circumstances were explained under which the Timber Supply Department came into existence, and the present Controller, Mr. J. B. Ball, M.I.C.E., M.I.M.E., was appointed. Some indication was also given of the steps taken to curtail imports, to reduce the consumption of wood for non-essential purposes, to secure economy in use, and to make the most of the standing timber in these Islands. The consumption of wood of all kinds in the United Kingdom immediately before the war is taken to be about eleven million loads (tons) annually of which about 10 million loads were imported, and one million tons consisted of home grown timber. The War introduced new demands which more than counterbalance the savings derived from the rigorous cutting down of the supply of wood allocated to civil purposes.

REDUCTION IN IMPORTS.

The reduction effected in imports was illustrated last week by a diagram, and for present purposes it may be recalled that the large total of 11,600,000 loads imported during 1913 was reduced to 2,900,000 loads for 1917.

Our dependence upon imported timber caused forestry as a science to be neglected in the United Kingdom, except to some extent in Scotland. Our recent woods were planted less for the production of commercial timber than for decorative purposes. It followed that we did not make the most of such woodlands as we possessed, and that the annual British produce in timber was not more than 1,000,000 tons, or about one-third of what it might have been under more scientific methods of forest culture of the same acreage.

THE DEMANDS UPON HOME TIMBER.

At the outbreak of war there were, fortunately, large stocks of imported timber in the country, so that there was no immediate scarcity when much shipping tonnage was diverted to war purposes and the enemy submarines began to attack merchant ships. It was not until the latter part of 1915 that the Government took up the conversion of home grown wood. During 1914 and 1915 the small pre-war production of timber at home was barely maintained, especially in the latter year, when many skilled timber workers enlisted in the Army. But in 1916 there was a considerable improvement, and it is estimated that 1,250,000 tons of sawn and mining timber were produced from the home forests. In 1917 this home production was further increased to 3,000,000 tons.

If all requirements are to be met during the year 1918 without encroaching upon the necessary tonnage for the conveyance of food, the supply of the Navy and Army, munitions, and other essential commodities, it is estimated that the home production will have to be not less than 2,900,000 tons of sawn wood, and 3,100,000 tons of mining timber, or an aggregate of six million tons. Six million tons in one year represent six times the annual

SPECIAL ARTICLES—continued.

produce of British woods during the years before the war broke out.

THE CONTROL OF HOME SUPPLIES.

In order that the utmost use might be made of the standing woods in this country, it was necessary for the Controller of Timber Supplies to regulate the purchase of timber and to arrange for its conversion in co-operation with the timber trade. On 4th July, 1917, was issued the Standing Timber (United Kingdom) Order, which provided that no standing timber in the country was to be purchased without a permit from the Controller. Timber sold with the land upon which it stood was excepted, and when timber bought by a single purchaser in any period of three months did not exceed £300 in cost no permit was necessary. The purpose of the latter exception was to allow small purchases to be made from time to time without a permit; if purchases amount in the aggregate to more than £300 in three months then a permit is required as soon as the £300 limit has been reached. The system of permits enables the Controller to prevent the cornering of supplies and the holding up of purchases for which there is no prospect of early conversion. The export of Irish timber to Great Britain is prohibited except under permit from the Assistant Controller of Timber Supplies for Ireland. Price schedules were issued in the Home Grown Timber Prices Order of 4th December last, and these schedules apply to home grown timber at all stages from the tree to the sawn plank. This Order of 4th December superseded an earlier Order of 4th July, which dealt with the prices of certain classes of converted soft wood. Pitwood was dealt with in an Instruction to collieries, dated 19th December, which was issued by the Controller of Coal Mines after consultation with the Controller of Timber. Stocks of pitwood at collieries were limited to twelve months' consumption and prices fixed which the collieries were not to exceed. The system of dividing the country into Pitwood Districts, grouped about the coalfields in order to save transport, and the establishment of District Pitwood Associations were described in the articles on the work of the Controller of Coal Mines.

ORGANISATION OF HOME SUPPLIES.

The branch of the Department of Timber Supplies which deals with home grown wood is organised into sub-sections dealing with such matters as the requisition and purchase of standing timber, the conversion of the wood, the provision of plant, transport, consignments and stocks, pitwood, and the supply of labour. England and Wales have been divided into eleven areas, each in charge of a Divisional Officer; the headquarters of the divisions are at Newcastle-on-Tyne, Bangor, Cirencester, Exeter, Chester, Cambridge, Nottingham, Taunton, Lyndhurst (Hants), Tunbridge Wells, and Oxford. The Scottish Branch, of which Sir John Stirling-Maxwell is in charge as Assistant Controller, is organised on similar lines to the English Production Branch at the Head Office. In Ireland the Assistant Controller is Mr. Forbes. Ireland is a very good source of supply for pitwood, and its export is encouraged, but licences are necessary for the exportation of soft wood of a size suitable for sleepers and scantlings.

THE OUTLOOK FOR 1918: SAWN TIMBER.

Hitherto in dealing with quantities of sawn timber we have used the measured "load" (50 cubic feet of soft wood or 40 cubic feet of hard wood) as the unit. A load of imported timber is approximately a ton in weight. But home grown timber, being of greater density, is heavier than that which is imported, and since we are concerned with quantities rather than with weight, it will tend to clearness if, when dealing with the outlook for 1918 in sawn timber, the trade unit—the "standard" of 165 cubic feet—be employed. There is reason to believe that the current

SPECIAL ARTICLES—continued.

year's requirements in Sawn Timber will amount to about one million standards. The largest consumers are the Ministry of Munitions, the War Office, the Admiralty (including their numerous contractors) and the Railways. During the year 1917 the importation of Sawn, Split, Planed and Dressed soft-wood, together with Sleepers and Hewn-wood (other than pitwood) amounted to approximately 500,000 standards. The pre-war home production may be estimated at 121,000 standards. During last year the Department alone produced about 100,000 standards. From such data as are available, it would appear that the production of Sawn Timber by merchants was about 200,000 standards, and of this the Timber Trade in Scotland, which is more highly organised than in England, produced the greater portion. If the production in Sawn wood of the Timber Trade and Timber Department together for 1917 amounted to 300,000 standards, it is obvious that, even after drawing heavily upon the stocks remaining in this country, in order to keep a three month's stock as the necessary minimum, there should be a considerable further increase in home timber production.

THE OUTLOOK FOR PITWOOD.

Before the war the requirements of the Mines, aggregating something like $3\frac{1}{2}$ million tons of mining timber annually, were satisfied to the extent of probably 90 per cent, or even more by imported woods. Now the greater part of the pitwood required has to be cut from home woods, and the supply has come forward in a satisfactory manner. In spite of the fact that imports of mining timber fell from no less than 3,451,328 loads in the pre-war year of 1913, to roughly one million loads in the year just ended, the stocks in the hands of Merchants and Collieries together are now at very much the same level as they were at the end of 1915, the first year-end at which a Stock Census of mining timber was taken. This year at least 3 million tons of mining timber will have to be produced in these islands. The home production of Pitwood last year was a little less than 2 million tons.

THE PURCHASE OF BRITISH WOODS.

Up to the end of last year, in England and Wales alone, the Department acquired about 54 million cubic feet of timber, comprising soft wood to the extent of 25,500,000 cubic feet, hard wood 9,700,000 cubic feet, and pitwood and poles 18,800,000 cubic feet; the approximate cost for this large quantity of timber being a little less than £2,200,000. It has been necessary in a few cases to requisition woods under the Defence of the Realm Regulations. In England and Wales the quantity of wood so requisitioned represents less than 5 per cent. of the total. In Scotland the Department had acquired up to the end of the year approximately 21,100,000 cubic feet of sawing timber of various species, and 3,300,000 cubic feet of pitwood poles, etc., making a total of 27,400,000 cubic feet, the cost being approximately £1,132,000. In Scotland approximately 20 per cent. of the total has been requisitioned, but it should not be assumed from this fact that Scottish landowners are less patriotic than those in England. It is necessary sometimes to requisition in order to get over legal difficulties. The Timber purchased by the Department in Ireland amounts to about 3,400,000 cubic feet, and in only one case has it been necessary to requisition.

EXPANSION OF SAWMILLS.

A few figures will illustrate the expansion which has taken place in the number of sawmills operated in the United Kingdom since the conversion of home supplies became urgent. In June, 1916, the Department operated forty-eight mills in England and Wales, Scotland, and Ireland. Eighteen months later the number directly operated had advanced to 182. In addition the Canadian

SPECIAL ARTICLES—continued.

Forestry Corps had twenty-nine mills at work in December last, the New England Sawmill Units ten mills, and the Newfoundland Forestry Corps one mill. The total number of sawmills at the end of last year was 222 as compared with fifty-eight in June of 1916, an increase of nearly 300 per cent. In England and Wales the weekly production of sawn timber was about 100,000 cubic feet at the beginning of 1917; by the middle of February of this year it had advanced to 293,000 cubic feet, nearly three times as much. In the United Kingdom, taken as a whole, the advance was even more marked.

In a further article the work of the Canadian, Newfoundland, and New England Foresters will be described, and some indications given of the manner in which the difficulties of machinery and transport have been dealt with.

TRADE RECONSTRUCTION IN GERMANY.

SYNDICATION TENDENCIES.

Two outstanding movements can be noted in the organisation of German industries at present—consolidation for purposes of economy and efficiency in dealing with the economic situation during the war, and syndication for purposes of an economic offensive in foreign markets after the war.

The first has been forced upon the Imperial Government by the shortage of raw materials, and by the need for entrusting output (in order to secure the most rapid rate of production) to those firms which are best situated to satisfy the requirements of the Army and the civil population. Although consolidation was originally regarded as a war measure, it has recently been hinted that the fusion of firms in their respective industries may be of a more permanent nature. The Head of the War Department made the following communication to the War Committee on German Industry in October, 1917:—

In the working out of schemes for consolidating and closing undertakings it has become increasingly apparent that all these measures will have a far-reaching influence upon the future economic structure of industrial and commercial conditions. This circumstance has led me to ask the Imperial Home Office to transfer all such questions to the newly-established Imperial Economic Office, as it is absolutely necessary that these important tasks should be carried out by a single central Imperial authority. The Imperial Government has assented to this suggestion, and declared its willingness to assume the direction of these affairs as from 5th November. Accordingly the Standing Committee for the Consolidation and Closing of Undertakings created by Order of 22nd December, 1916, will cease to have competence in these matters.

Coal shortage has been responsible for the curtailment of activities in the case of many firms, and has consequently led to their consolidation. In Berlin all trades were circularised by the Government on the advisability of these fusions. Boot-makers and butchers opposed it, while bakers approved. As a result, all baking of bread is done by a few chosen firms.

ADVANTAGES OF AMALGAMATION.

The exceptionally intensified tendency towards fusion for war purposes has not, however, taken place without criticism, but where the movement has caused hardship and loss the Reichstag Committee of Commerce have promised, in some instances to place such cases before the Imperial Chancellor for favourable consideration. They have also recommended that the compulsory closing down of certain enterprises will cease of itself when the embargo on raw materials is raised. Commenting on the movement, the *Vossische Zeitung* states:—

SPECIAL ARTICLES—continued.

No branch of our economic life has been unaffected by this tendency. It was undoubtedly encouraged by war difficulties of many kinds, but the fact that it has extended so considerably in recent months indicates its importance as action of a preparatory character for peace. The advantage of amalgamations of undertakings of the same character is obvious; economy in administration, in securing of markets, in the working-up of projects and, finally, in the employment of resources. In amalgamated concerns the capital invested may be more profitably utilised than if the concerns remained independent. Offensive power against competition, and especially against foreign competition, is fortified by all these means.

CENTRAL INSTITUTE FOR FOREIGN TRADE.

These consolidations, however, which have affected several industries, must not be confused with the syndication and amalgamation of industries, which are also proceeding. As stated above, the former are war measures—although the memorandum from the War Department transferring their direction to the Imperial Economic Office (the Reconstruction Ministry) points to their maintenance in the future—while the latter are avowedly intended for the promotion of export trade after the war. It is proposed that these syndicates shall be supported by a Central Foreign Trade Institute. This can be formed, it is said, by amalgamating existing German Foreign Trade Associations. The Institute would have a central office, with a library and exhibition rooms, and would organise advisory and executive bodies from their Committees. Such an Institute, it is added, could easily form branches abroad.

Commenting upon the proposal, the *Vossische Zeitung* states:—

The proposal has often been brought forward during recent years, but now acquires fresh force owing to the British blockade and the threatened "economic war" after hostilities cease. But sufficient stress is apparently not laid on the necessity for protecting German trade abroad. The foreign branches of the Institute must do that in whatever form they are set up. They must tell the home manufacturer what goods are required in a certain country, and what goods we can best import from there.

Syndication has taken place in the iron and steel trades, various textile industries, mining, the metal industries, the engineering trades, chemical industries, and in several industries allied to these. In several cases it has taken the form of amalgamation of firms, and in others the absorption of the smaller firms by the larger and more powerful. During the war their main object appears to be the acquisition of control over large aggregates of capital, by which they will eventually be in a position to begin their after-war activities on a "colossal" scale. In order to carry out their programme they require both raw materials and money.

FUSIONS IN THE MINING INDUSTRY.

In the sphere of coal mining, the difficulties of railway transport is responsible for the desire of many smelting works to safeguard their coal supply by acquiring their own coal mines. Even before the war the rolling stock of the German railways was inadequate, and now the needs of military transport have made such enormous demands on the railway system that it is unable to cope with the normal services, including the delivery of coal. In view of these circumstances the strongly-marked tendency of the last two years towards fusions between industrial and coal concerns is intelligible.

The same tendency has manifested itself in the case of ores. Before the war Germany had to import supplies of rich ores from Russia, Spain, Northern France and Sweden. The war, although it did not cut off all foreign supplies, considerably limited their extent, and it became necessary, therefore, to find substitutes in Germany itself. The Siegerland ores answered the purpose, and a strong tendency towards fusion set in throughout the Siegerland district.

Notes on Trade.

[While every care is exercised to ensure the accuracy of any explanatory articles or notes relating to Acts, Regulations, Orders, etc., published in the "Journal," it must be understood that such explanations are necessarily in the nature of summaries, and cannot be quoted as authoritative legal interpretations of the text of the documents themselves.]

TIN AND TUNGSTEN RESEARCH BOARD.

As the outcome of a Conference held on the 7th November, 1917, at which there were present representatives of the Committee of the Privy Council for Scientific and Industrial Research, of the Department for the Development of Mineral Resources, and many of the land and mine owners of Cornwall, a fund for research has been raised, and a Research Board have been appointed by the Committee of the Privy Council consisting of:—Sir Lionel Phillips, Bart. (Chairman); Mr. John G. Gilbert, Cornish Chamber of Mines; Sir Frank Heath, K.C.B., Department of Scientific and Industrial Research; Sir Thomas Kirke Rose, Chairman of the Research Committee of the Board; Mr. Edgar Taylor, Institution of Mining and Metallurgy; Mr. R. Arthur Thomas, Cornish Chamber of Mines; and Sir Richard Threlfall, K.B.E., F.R.S., Advisory Council for Scientific and Industrial Research.

Mr. A. Richardson is Secretary to the Research Board, and communications should be addressed to him at 15, Great George Street, Westminster, London, S.W. 1. The Board, after consultation with their Research Committee, have authorised extended lines of research with a view to increasing the recovery of metal in the treatment of ores.

SALE OF WOOL (U.K.) ORDER, 1918.

The War Office (British Wool Section) desire to bring to the notice of all persons concerned that under the Sale of Wool (United Kingdom) Order, the text of which is reproduced on another page, the following regulations have been applied to dealings in British and Irish wool of the 1918 clip:—

(1) All persons are required to sell to authorised merchants, and the sale of wool to unauthorised persons is prohibited. It should be specially noted that this prohibition applies to all wool with the exception of gathered wool and unwashed daggings or clarts, and not only to fleeces and skin wool as in previous years. It should be understood that by "gathered wool" is meant wool collected from hedges and other places where it is left by the living sheep. It does not include locks picked up from the shearing floor, and these must be sold to the Department.

(2) All farmers holding stocks of 1918 wool are required to furnish particulars to the Director of Raw Materials. Further information as to the census of the 1918 wool clip will be published by the District Executive Officers for the various areas at a later date.

(3) Manufacturers are prohibited from making up any class of wool (except gathered wool as described above) for the use of the owner.

(4) Export of wool from Ireland is prohibited except under permit.

(5) The stuffing of fleeces with inferior wool or any foreign matter is prohibited, and all fleeces must be wound and tied with wool bauds or glazed string. This glazed string can be obtained from authorised merchants and other authorised persons, and the use of string bought through any unauthorised channel or any other foreign matter for tying fleeces is prohibited.

(6) As in previous years no restriction is placed upon dealings in Shetland wool.

(7) Dealings in daggings and clarts are permitted only under permit. Application for such permits should be made to the District Executive Officer for the area in which the applicant carries on his business.

(8) All daggings and clarts which are purchased under these permits must after manipulation be offered in the cleansed state to the Department. The Department has the right to take over any lots it desires at prices *pro rata* to the Area Buying

NOTES ON TRADE—continued.

Schedule. In other cases the holder will be licensed to sell subject to certain restrictions.

All persons desiring further information as to this Order or the method of collection of the 1918 United Kingdom wool clip, should apply to their District Executive Officer, or to the Director of Raw Materials, British Wool Section (Room 459) Caxton House, Tothill Street, Westminster, London, S.W. 1.

WOOL (OFF-SORTS) No. 2 ORDER, 1918.

The War Office (British Wool Section) desire to bring to the notice of all persons concerned the announcement made on 22nd February that the Department intended to take over on 31st March all off-sorts of the 1917 British wool clip, with the exceptions of oddments not required by them and off-sorts held by users for the purpose of manufacture by themselves. Attention is now drawn to the new Order issued by the Army Council which prohibits dealings in any off-sorts from British wool grown prior to 1st January, 1917, after 31st March next, except under permit, and empowers the Department to take possession of all such off-sorts on the 31st March except those held by users for the purpose of manufacture by themselves. It should accordingly be understood that, after that date, the British Wool Section will take over all British off-sorts whatsoever, with the exception of oddments for which they have no use, and those in the hands of the manufacturers. Payment will be made for all these off-sorts at the prices prescribed in the Off-Sorts Order, 1917. In cases where the Department does not desire to take over any particular lot a licence will be given to the holder to dispose of it, subject to certain conditions.

It should, of course, be understood that nothing in this communique affects dealings in off-sorts of the 1918 clip, to which reference is made above. The text of the Wool (Off-Sorts) No. 2 Order was published in last week's issue of the "Journal."

SCIENTIFIC AND INDUSTRIAL RESEARCH.

The foundation of the Department of Scientific and Industrial Research in December, 1916, led to the creation of an Imperial Trust for the encouragement of such research, which holds on behalf of the Department the sum of £1,000,000. The Advisory Council recommended that the money thus made available should be spent in the form of grants in aid of research undertaken by firms in any industry which may combine to conduct it on a co-operative basis. The Council advised that the best means to this end was the establishment, under the Companies Acts, of Associations for Research, limited by guarantee, and trading without profit.

In a leaflet describing the Government scheme for industrial research (Research Association 1), issued by the Department, it was stated that the method of assessing the subscription of each firm would have to be negotiated with each industry or section of an industry which may agree to combine for the purposes of research, but that the intention was that firms should contribute on a basis proportionate to their size. Thus the small firm would contribute less than the large firm, yet it would have the same privileges, though as a rule it would not in the nature of the case have the same facilities for exploiting the results of research. The Department have now issued a further leaflet (Research Association 4), in which they deal with the method of subscription to Research Associations. It is certain, they say, that most British industries are conducted on so large a scale that if a majority of the firms engaged in each of them join the appropriate Research Association and contribute in proportion to their size, the burden on any single firm will in many cases be comparatively small, less, indeed, than the premiums for Fire, Employers' Liability, or National Health Insurance. For this reason, it will normally be sufficient if a Research Association levies subscriptions on such a basis that a near approximation to the correct amount is raised from each firm. There is no need, even if it were possible, to make careful calculations in order to ensure that the burden is

NOTES ON TRADE—continued.

distributed quite equitably and in exact proportion to the size of each of the contributing firms.

It may be noted that experience has shown that, in some cases in which the industry is not a very large one, or the initial expenditure on research is not expected to be on any considerable scale, it has been found sufficient to arrange for the levy of uniform subscriptions from the firms or individuals joining the Association. Such cases are, however, somewhat exceptional, and the new leaflet deals with the more numerous Associations for which proportionate subscriptions are likely to prove more suitable.

CAPITAL OFTEN THE MOST SUITABLE STANDARD.

A consideration of all the different standards suggests that the most practical method of raising funds for a Research Association is, in many cases, to base the subscription of each firm on the amount of capital it employs in its business. There are objections to this, some of which have been dealt with in the leaflet, but no other factor complies so fully with the necessary conditions where dissimilar branches of the same industry are concerned.

COMPOUNDING OF SUBSCRIPTIONS BY FEDERATIONS OF EMPLOYERS.

Serious difficulties arise in fixing suitable bases of assessment when Federations of Employers engaged in different branches of an industry join the same Research Association and agree to compound their subscriptions. These difficulties must, however, be faced, as the compounding of the subscriptions of members of an Employers' Association leads to simplicity of administration, to equitable assessments for firms engaged in similar business, and to economy of effort in the task of securing general co-operation. Whether a Federation has adopted the amount of plant, wages, output, or any other comparable quantity as a basis for the assessment of the ordinary subscriptions of its members, the proper course for the Research Association appears to be to accept the method employed by the Federation and to try to bring it into terms of capital. Thus, if the number of spindles or looms is the basis, calculations must be made as to the approximate capital represented by a spindle or loom in a mill and the assessment based on that; if the wage bill is the basis, then a relation between the wage bill and the capital of several typical concerns must be determined. In any case, the Department states, it is essential that the Employers' Federation, when such exists, shall in each case be taken fully into consultation, in order that its members may have the opportunity of learning that the levy made upon them is equitable.

TRAFFIC THROUGH BRISTOL CHANNEL PORTS.

The Port and Transit Executive Committee (Ministry of Shipping) have appointed a Sub-Committee, to be termed the "West of England and Bristol Channel Port and Transit Committee," for the purpose of maintaining, under the direction of the parent Committee, the flow of traffic through the ports of the Bristol Channel.

The Sub-Committee has been constituted as under:—

- Mr. Mark Whitwell, Chairman.
- Mr. I. J. Anthony, Cardiff, Coal Controller.
- Mr. P. Caesar, Bristol, Coal Controller.
- Mr. P. G. Caple, Hon. Sec. Bristol Tug Owners' Committee.
- Mr. W. J. S. Cox, Railway Executive Committee.
- Mr. F. A. Gibson, Secretary to the District Coal and Coke Supplies Committee for South Wales and Monmouthshire.
- Mr. E. S. Hockaday, J.P., Forest of Dean Coal Owners' Association.
- Mr. H. Hosegood, Landed Grain Committee.
- Mr. S. J. Plummer, Dock, Wharf, Riverside and General Workers' Union.
- Mr. H. Searle Smith, West of England Coal Traders' Association.
- Mr. E. Spear, J.P., District Coal and Coke Supply Committee.
- Mr. Walter Sessions, Associated China Clay Company.

NOTES ON TRADE—continued.

The Secretary of the Sub-Committee is Mr. E. A. Clark, and the Offices of the Sub-Committee are at 25, Great George Street, Bristol.

BISMUTH ORES, ETC., ORDER.

The Minister of Munitions has issued an Order, dated 12th March, providing that no person may deal in Bismuth-bearing ores, metal, alloys and salts, except by permit issued by him. At the same time a general permit under this Order is given for the purchase of the metals (up to 10 lbs. per month) and the salts (up to 56 lbs. per month) where they are to be used for pharmaceutical and medical purposes.

The Order provides that certain returns shall be made (except by persons holding not more than 56 lbs. of salts or 14 lbs. of metals or alloy per month and not using them for the manufacture of steel, alloy or other metal) which will indicate stocks held, output of mines, consignments from abroad, and quantities used in manufacture.

Permits will be used on conditions which will be endorsed on the permit. Applications for permits to export to Allied countries must be made through the Commission Internationale de Ravitaillement.

No application for permit will be considered unless the applicant states in detail:—

- (a) Class and quantity of material it is proposed to purchase.
- (b) The use to which material is to be put.
- (c) The period for which the supply will suffice.
- (d) The name of the person, firm or company by whom the material is to be supplied.

The prescribed forms for returns may be obtained on application to the Controller of Non-Ferrous Materials Supply, M.S./P., Ministry of Munitions, 8, Northumberland Avenue, W.C., 2, who will also issue the permits.

SHELLAC ORDER.

Under an Order of the Minister of Munitions, dated 12th March, trade in Shellac, where the amounts exceed 7½ cwt. per month, can only, until further notice, be carried on by persons who are licenced by the Minister of Munitions, unless the buying and selling is necessary to carry out a contract existing before 12th March.

The Order provides that all persons who have held since 1st January, 1917, in the aggregate more than 7½ cwt. of Shellac shall within seven days make a return of their holdings, whether in stock or transit, setting out the grade, the purpose for which intended, and the average monthly consumption during 1917.

"Shellac" includes Seed Lac, Stiek Lac, Garnet Lac and Button Lac.

SOUTH AUSTRALIAN HARBOUR REGULATIONS.

The Board of Trade have received a copy of the following Regulations made by the Governor of South Australia in Council on the 8th November and 20th December last respectively, under the provisions of the Harbours Act, 1913:—

Notwithstanding anything contained in any previous Regulation, ballast shall not be discharged from any ship at Port Victoria except within the limits hereunder defined, viz., to the westward of a line from which Rocky Island bears N. by E. ¼ E., and northward of a line from which the south extreme of Wardang Island bears west. The penalty for a breach of this Regulation shall be a sum not exceeding fifty pounds, and the offender shall be liable to pay the expense incurred by the Board in the removal of any ballast improperly discharged.

Transshipment Charges on Bunker. Coal.—Notwithstanding anything contained in the Regulation made under the Harbours Act, 1913, and dated 27th September, 1917, whenever the transshipment charge has been paid to the Board on coal placed into lighters for bunkering purposes, no further transshipment charge shall be chargeable and paid when such coal is transferred into steamers' bunkers from such lighters. This Regulation shall take effect as from the 27th day of September, 1917.

Imperial and Foreign Trade.

BRITISH EMPIRE.

BRITISH INDIA.

THE INDIAN BANKING SYSTEM.

In 1915 a volume was published by the Indian Department of Statistics, containing in a handy form the available statistics relating to banking in India. A third volume on the subject has just been issued, which aims at giving the information in a more complete form, and in a simple and non-technical manner.

THE PRESIDENCY BANKS.

There are, first of all, the three Presidency Banks which enjoy the prestige of antiquity, and, one might also say, of official dignity derived from acting as bankers to Government. These banks are severely restricted by law, and absorb considerably more of the banking business than do the Indian Joint-Stock Banks. They are confined to a fixed territory in accordance with the Presidency Banks Act, XI. of 1876. The Bank of Madras is limited to the Presidency of Fort St. George (Madras), the Bank of Bombay to the Presidency of Bombay, and the Bank of Bengal to the Presidency of Fort William, which means all the territories in British India other than the Presidencies of Fort St. George and Bombay (*i.e.* Bengal, Bihar and Orissa, the United Provinces, the Punjab, Delhi, the Central Provinces, Burma, Assam, and the North-West Frontier Province). The Banks can, however, establish, with the previous consent of the Governor-General in Council, branches or agencies at places outside the Presidency in which the Bank is situate.

THE EXCHANGE BANKS.

Next in point of importance come the Exchange Banks, which play an important part in the financing of Indian trade. These are all banks with head offices out of India. Several of these banks were founded 60 years ago. Of the ten banks, five do a considerable portion of their business in India, *e.g.*, the Chartered Bank of India, Australia, and China, the National Bank, etc., while others are merely agencies of large banking concerns doing business all over Asia, *e.g.*, the Hong Kong and Shanghai Banking Corporation, the International Banking Corporation, the Yokohama Specie Bank, etc. The Delhi and London Bank, it may be noted, has been amalgamated with the Alliance Bank of Simla. The business of these banks may be divided into (a) exchange business, and (b) ordinary banking business.

THE INDIAN JOINT-STOCK BANKS.

The third class of banks comprises the Joint-Stock Banks registered under the Indian Companies Act, and having their head offices in India. These are chiefly scattered throughout the north-west of India, especially in the Punjab and the United Provinces. With the exception of the Allahabad Bank (established in 1865), and the Alliance Bank of Simla (established in 1874), most of these banks are of comparatively recent date or have been recently reconstructed. In the tables in this volume these banks are sub-divided into two classes namely, (a) those with a minimum paid-up capital and reserve of five lakhs of rupees and over, and (b) the smaller banks, those with a capital of between one lakh of rupees and less than five lakhs. The bank failures of 1913, 1914, 1915, and 1916 were confined to Indian Joint-Stock Banks, and the total paid-up capital of the banks that failed amounted to 45 per cent. of the total paid-up capital of Indian Joint-Stock Banks.

OTHER BANKS.

In addition to these banks are the Post Office Savings Banks, with over a million and a half depositors and approximately £6,250,000 on deposit. The deposits are treated as unfunded debt, and no reserve is, of course, kept against these deposits. There are also co-operative credit banks, which are not at present of much importance in the banking system, as the capital and reserves in 1915-16 were only two and a half crores of rupees, and the deposits (including loans held by the banks) seven and three-quarter crores of rupees.

BUSINESS OF BANKS.

The business of banks in India is confined to two of the three chief functions of banks. The banks lend or discount and also hold deposits. The third function of banks—the issuing of bank notes—was withdrawn in 1862 when Government withdrew from banks the right to issue notes.

There are 71 head offices and 267 branch banks in India. The number of towns in which banks and their branches

IMPERIAL AND FOREIGN TRADE—continued.

are situated is 153, or 20 per cent. of the total number of towns in India having each a population of 10,000 and over according to the Census of 1911. There are 75 towns with a population of 50,000 and over. In 58, or 77 per cent., of these there are banks.

CAPITAL AND RESERVES.

The following table shows the capital and reserves of banks doing business in India in 1916. The Exchange Banks have agencies outside India, and the whole of the capital and reserves of these banks cannot strictly be said to be capital and reserves of Indian banks. It is, however, not possible to estimate what share of such capital and reserves should be assigned to the Indian branch of their business.

	Capital. Reserves. Total.		
	Rupees (1,000).	Rupees (1,000).	Rupees (1,000).
Presidency Banks (3)...	3,75,00	3,60,99	7,35,99
Exchange Banks (10)...	34,25,40	22,64,25	56,89,65
Major Indian Joint-Stock Banks (20)	2,87,36	1,73,66	4,61,02
Other Indian Joint-Stock Banks (28)	51,77	11,50	63,27
Total	41,39,53	28,10,40	69,49,93

It will be seen that the capital and reserves of sixty-one banks amounted to 69.50 lakhs of rupees, or £46,000,000. The capital and reserves of sixty-five English banks (including the Bank of England) in 1916 amounted to £132,000,000. The capital and reserves of Indian banks are thus 2 rupees* (2s. 8d.) per head of population as against 44 rupees (£3) in the United Kingdom.

CANADA.

COMMERCIAL AND FINANCIAL CONDITIONS.

(From the Office of H.M. Trade Commissioner.)

MONTREAL, 26th January.

The exceptionally severe weather throughout the eastern part of Canada has somewhat hampered the movement of travellers. Wholesale trade shows signs of expansion throughout the Dominion. There is a good demand for textiles, groceries and provisions. There is a decided shortage of Indian and Ceylon teas, but this is being met by the importation of tea from Java—a new development in the market. The difficulty in obtaining goods from the United Kingdom, and latterly an increasing difficulty in obtaining supplies from the United States, will tend to throw Canada more upon its own resources as a manufacturing country. At the present time, however, essential raw materials in many lines are almost impossible to obtain, owing to the embargo placed by the United States on many exports.

FINANCIAL SITUATION.

Official figures of the value of exports for the year ended 31st December, 1917, are a striking indication of the benefit derived by the Dominion from the increased values of commodities exported since the beginning of the war. During the years 1912-14 the value of imports into Canada exceeded that of exports from the Dominion by the following amounts:—1912, 293,607,000 dols.; 1913, 222,848,000 dols.; and 1914, 101,923,000 dols. During 1915-17, however, the value of exports exceeded that of imports by the following amounts:—1915, 162,461,000 dols.; 1916, 324,980,000 dols.; and 1917, 542,296,000 dols. Exports in 1912 were valued at 341,978,000 dols., as compared with 1,547,430,000 dols. in 1917; while imports in 1912 were valued at 635,585,000 dols., as compared with 1,005,124,000 dols. in 1917. Of the 1917 exports, manufactures (chiefly munitions) account for 682,521,000 dols., and agricultural products for 531,300,000 dols.

Private deposits in the banks continue to be maintained satisfactorily, in spite of the heavy payments recently transferred on account of the last Victory Loan.

RAILWAYS.

The railway situation is becoming increasingly interesting. By a decision of the Railway Commissioners an increase of 15 per cent. on the passenger and goods rates on all Canadian railways was to have come into force on 1st February. The Western Provinces have protested against the increase, and their case is being heard before the Governor in Council at Ottawa. As a result of the

*Note.—In this calculation the total capital and reserves of the Exchange Banks have been taken into account as the Indian portion of their capital and reserves cannot be estimated.

IMPERIAL AND FOREIGN TRADE—continued.

protest the date on which the increased rates shall take effect is postponed pending further consideration.

The larger question of Government ownership of all the railways is now coming forward prominently. The Government system at present comprises the Inter-colonial, Trans-continental, Canadian Northern and Hudson's Bay Railways. Discussion is taking the form as to whether the Canadian Pacific, the Grand Trunk and Grand Trunk Pacific should also come under Government control, and whether the proposed system should be worked under Government ownership and operation, or under Government ownership with independent operation. Financial considerations will necessarily be a determining factor in arriving at a decision. It is understood that a Governmental Committee is considering the situation and will report in due course.

Orders amounting to 7,000,000 dols. are about to be placed for passenger car equipment, locomotives, box cars, and machinery for the use of the Government railways.

SHIPBUILDING.

In the matter of shipbuilding the Government is taking steps to utilise existing private plants (of which there are eleven capable of building steel ships), and have given orders for as many vessels as the yards can supply in reasonable time. These vessels will be in accordance with the latest type of standard British ships, and adapted for bulk or general cargo. The securing of the necessary ship plates and shapes is one of the greatest initial difficulties.

PILOTAGE.

A special commission is about to be created for the investigation of the pilotage systems in operation at the port of Halifax and at other important ports.

LIQUOR TRAFFIC.

An Order in Council modifying the previous regulation respecting liquor traffic, provides that any alcoholic liquor actually shipped or on the way to Canada at 31st January might be received after that date.

LABOUR CONDITIONS.

The shortage of labour is calling forth many proposals to remedy the situation. Central Exchanges and Provincial Labour Bureaux are advocated, and have formed the subject of discussions between conferences of organised labour and of agriculture at Ottawa during the past week.

A Bill to amend the Workmen's Compensation Act is under consideration by the Quebec Legislature.

The Committee which were appointed last August to go into the question of workmen's compensation in the Province of Alberta, have made their report and have submitted a draft Act providing for what is practically State insurance; they recommend that legislation to that effect be introduced in the coming session.

The average cost of living continues to increase. The Department of Labour has compiled a return showing that a family budget of staple foods cost 12.24 dols. per week in December, 1917, as against 12.10 dols. in November, 1917, 10.10 dols. in December, 1916, and 7.95 dols. in December, 1914.

FORMATION OF ASSOCIATIONS OF LUMBER DEALERS.

A "Wholesale Lumber Dealers' Association (Incorporated)" has obtained a Dominion charter. The operations of the corporation will be carried on without share capital, and its chief office will be at Toronto. The purposes of the Association, writes the Imperial Trade Correspondent at Toronto, are stated as follows in the official notice of incorporation:—

"To protect the members against unbusinesslike methods in the wholesale lumber trade; to foster such trade and commerce; to reform abuses in such trade and business; to secure freedom from unjust and unlawful exactions; to diffuse accurate information among its members as to the standing of merchants and others by and with whom said trade or business is conducted, and as to other matters; to produce uniformity and certainty in the customs and usages of said trade, and of those engaged therein; to settle differences between its members by arbitration or otherwise, and to promote a more enlarged and friendly intercourse between them."

It is understood that the chief work of the Association will be the operation of a credit bureau for the exchange of information regarding the standing of customers. Other important matters to be dealt with are those related to transportation problems and legislation. The operations of the Association will be confined to Ontario, although dealers outside the Province will be allowed to become members if they are selling in the Province and have information to exchange.

An "Ontario Retail Lumber Dealers' Association" has also been organised. The Province has been divided into five sections for the purposes of this Association. Each section will have a local association, which will deal with problems arising in their respective districts. The Central

IMPERIAL AND FOREIGN TRADE—continued.

Association, at Toronto, will deal with matters of mutual interest to the five local bodies, and will act as the financing organisation. It is possible that the local sections will each have a credit bureau similar to the wholesalers' bureau noted above. The Retail Association will deal with trade disputes, transportation matters, the prevention of sales by wholesale dealers direct to consumers, etc.

The two Associations, wholesale and retail, together with the Lumberman's Credit Bureau Incorporated (which is composed of Toronto retailers only, and which has been in existence for several years), will all be managed from a central office in Toronto by one Secretary.

NEWFOUNDLAND.**TRADE CONDITIONS IN 1917.**

The Imperial Trade Correspondent at St. John's reports that the trade of Newfoundland for the year 1917 has been exceedingly prosperous. The codfishery, the staple industry of the Island, has closed with the largest catch on record, and prices obtained by the fishermen have been the highest ever known. In order to carry the fish to market exporters purchased sailing vessels in the United States and in Canada, steamers not being available. The herring catch, the seal fishery, and the paper and pulp industry have all made excellent returns, and labour has participated in the general prosperity.

Trade in goods imported from Canada and the United States has been brisk. Owing to the want of communication with the United Kingdom, and delay and uncertainty in filling orders, imports thence have not increased in proportion to the imports from Canada and the United States. During the summer of 1917, buyers who formerly visited the United Kingdom and bought their requirements there, tried the United States for a number of lines. They express a desire to return to the United Kingdom, and to risk the delay and difficulty of conveyance.

SOUTHERN RHODESIA.**REGISTRATION OF ACCOUNTANTS.**

The "British South Africa Company Government Gazette" of 11th January publishes the text of an Ordinance (No. 14 of 1917) to provide for the registration of accountants in Southern Rhodesia. This Ordinance (the "Accountants' Ordinance, 1917") provides, *inter alia*, that after its promulgation no person shall describe himself as an accountant, or as an auditor, unless he is registered as a public accountant in pursuance of this Ordinance; provided always that this section shall not prevent any person employed exclusively at a salary on accounts from describing himself as an "accountant" in respect of or in relation to his occupation.

The Ordinance further provides that the persons registered are to be constituted and incorporated into one body corporate, to be called "The Rhodesia Society of Accountants," which shall have disciplinary powers in relation to the profession of accountancy. The registration fee is not to exceed £5 5s.

ZANZIBAR PROTECTORATE.**PERMITS FOR SALE OF CERTAIN FOOD-STUFFS, ETC.**

The "Official Gazette" of the Zanzibar Protectorate of 31st December publishes a Notice (No. 220) to the effect that certain food-stuffs (including rice, wheat and flour), hoes, and certain cattle and goats are not to be sold in Zanzibar Island, or otherwise disposed of, without the written permission of the Chief Supply Officer.

NOTICES UNDER THE PATENTS, DESIGNS AND TRADE MARKS DECREE, 1917.

The "Gazette" of 7th January publishes a Notice (No. 2) under the Patents, Designs and Trade Marks Decree, 1917, to the effect that the Registrar for the time being of the High Court for Zanzibar will discharge the functions of Registrar of Patents, Designs and Trade Marks. The same issue of the "Gazette" publishes as a Notice (No. 3) the fees chargeable under the above-mentioned Decree.

The above-mentioned copies of the "Official Gazette" may be consulted by British firms interested at the Department of Overseas Trade (Development and Intelligence).

[NOTE.—A notice relative to the Patents, Designs and Trade Marks Decree, 1917, of Zanzibar, appeared on p. 593 of the "Board of Trade Journal" of 14th June last.]

IMPERIAL AND FOREIGN TRADE—continued.

BRITISH GUIANA.

TAXES FOR 1918.

The "Official Gazette (Extraordinary)" of British Guiana of 24th December publishes the text of the Tax Ordinance, 1918 (No. 24 of 1917), imposing certain taxes during the year 1918.

The following taxes, duties, etc., *inter alia*, are imposed by this Ordinance:—

EXCESS PROFITS TAX.

An Excess Profits Tax is to be levied on all individuals, firms or companies carrying on business in the Colony of British Guiana, amounting to 10 per cent. on all profits earned in the Colony in excess of 10 per cent. on the capital employed in earning such profits. The following businesses are, however, exempt from the tax (a) businesses the capital employed in which has been throughout the accounting period less than 5,000 dols.; (b) fire and life insurance companies; (c) shipping companies; (d) cable companies; and (e) building and benevolent societies.

In the case of banking institutions a fixed tax of 1,500 dols. a year is to be levied in lieu of the tax on business profits. Also, if a business is carried on in the Colony in such manner (for instance, through an agent) as to make it practically impossible to arrive satisfactorily at the amount of the capital employed and/or the profits earned, a tax of 2 per cent. shall be levied on the amount of the sales, purchases and commissions of such business within the Colony.

STAMP DUTIES.

Stamp duties are to be collected on the following, among other, documents: Affidavits or declarations under the Statutory Declarations Ordinance, 1893; agreements or memoranda of agreement not otherwise specifically charged with any duty, whether such agreement or memorandum is only evidence of a contract or obligatory upon the parties from its being a written instrument; bankers' cheques, bills of exchange, promissory notes, bills of lading, bills of sale or mortgage, contract notes, charter parties, deeds, and receipts.

ESTATE DUTY.

Estate duty, substituting that previously paid, is to be levied in the case of persons dying after the commencement of this Ordinance, on the value of the property of the deceased. The amount of the duty ranges from 1 per cent. to 12 per cent. on estates the net value of which exceeds 500 dols. and 2,000,000 dols. respectively.

ACREAGE TAX ON CANE CULTIVATION.

A tax of 31 cents is imposed upon each acre of land under cane cultivation. Land not exceeding five acres in extent cultivated by one person is exempt from the tax.

TONNAGE AND LIGHT DUES.

The Ordinance provides for the levying of tonnage and light dues on vessels entering ports in the Colony.

LICENCE FEES.

Licence fees are payable under the Ordinance by banking houses, insurance companies, druggists, house agents, auctioneers, etc. Licences are also required for the importation and sale of Indian hemp, for the sale of tobacco, for the keeping of a bonded warehouse, and for the purchase of balata.

TRADING LICENCES.

The Ordinance provides that any person who occupies any store, shop, etc., in Georgetown or New Amsterdam in which there are sold any goods, or who occupies any office or counting house in these towns for the purpose of carrying on any mercantile business therein, must take out a licence, the duty on which ranges from 8 dols. (when the annual rental value does not exceed 50 dols.) to 250 dols. (when the annual rental value exceeds 10,000 dols.).

The above-mentioned copy of the "Official Gazette" may be consulted by British firms interested at the Enquiry Office of the Department of Overseas Trade (Development and Intelligence).

EUROPE.

FRANCE.

REGULATIONS AFFECTING TRADE.

The following Decrees, etc., have appeared in recent issues of the "Journal Officiel":—

NEW PILOTAGE DUES AT HONFLEUR.

A Presidential Decree, dated 11th January (published 22nd January), modifies the Decree of 19th April, 1904, which fixes the pilotage dues for the station of Honfleur.

IMPERIAL AND FOREIGN TRADE—continued.

PORT IMPROVEMENTS AT LA ROCHELLE.

A Presidential Decree, dated 19th February (published 23rd February), authorises the La Rochelle Chamber of Commerce to borrow 300,000 frs. towards the expenses of installing capstans, etc., at that port.

REQUISITION AND CENSUS OF CERTAIN FUELS IN ALGERIA.

A Presidential Decree, dated 22nd January (published 23rd January), requires, at a date to be fixed hereafter, a declaration of all stocks in Algeria of firewood and charcoal exceeding, respectively, 100 and 10 quintals. These commodities are also declared liable to requisition by the civil authorities.

REVISED PRICES OF REGIE TOBACCOS.

A Presidential Decree, dated 18th January (published 24th January), fixes revised prices for the retail sale in France of "régie" tobaccos, other than smoking and chewing "zone" tobaccos.

CONTROL OF COFFEE TRADE: COMMITTEE APPOINTED.

A Ministerial Order, dated 19th February (published 21st February), establishes in connection with the Ministry of Agriculture and Food Supply, a Committee to regulate trade in coffee. The Order also gives the names of the members appointed to this Committee. The Committee are divided into four sections, meeting at Havre, Bordeaux, Marseilles, and Paris, with plenary sittings in Paris.

CONSUMPTION, MANUFACTURING, ETC., DUTIES ON CERTAIN ALCOHOLIC BEVERAGES.

A Law, promulgated on 22nd February (published 23rd February), suppresses until 31st December, 1918, all octroi duties and supertax duties on alcohol, wine, cider, perry, mead, and beer, with the exception of the duty on wines in bottles provided for by Article 4 of the Law of 29th December, 1897. In place of these octroi duties certain consumption, manufacturing and transport duties are to be levied on these beverages, as well as on fruits (dry or otherwise) for the manufacture of cider or perry.

BOURSE TO BE ESTABLISHED AT TOULON.

A Presidential Decree, dated 19th February (published 23rd February), authorises the establishment of a commercial exchange ("bourse du commerce") at Toulon.

EXTENSION OF MORATORIUM.

A Presidential Decree, dated 19th February (published 24th February), extends, without modification, for a further period of ninety days from 1st March, the Moratorium in respect of insurance companies, loan societies and savings banks ("entreprises d'assurance, de capitalisation et d'épargne"), which was originally imposed on 27th December, 1914.

The text (in French) of the above-mentioned Decrees may be consulted by British firms interested at the Enquiry Office of the Department of Overseas Trade (Development and Intelligence).

ITALY.

RECENT MEASURES AFFECTING TRADE.

Translations of a number of Decrees recently published in the "Gazzetta Ufficiale" (Rome) have been received at the Department of Overseas Trade (Development and Intelligence) from H.M. Embassy in Rome.

CENSUS OF TEXTILE MATERIALS AND TISSUES.

A Decree of the Minister of Industry, Commerce, and Labour provides for taking a census of certain important classes of goods, especially of raw cotton and cotton yarns, hemp and hemp yarns, silk waste, and jute and jute yarns. All holders of these goods, provided the quantities exceed 1,000 kilogs. for raw cotton, hemp and jute, and 500 kilogs. for yarns and silk waste, must give notification of the same to the above-mentioned Ministry (Department of Industrial Supplies and Consumption).

Notifications must indicate the quality and quantity of the goods, the owners of the same, the place, the date, and the name of dépôt, or the name of the depository, if the holder be not the owner; and also particulars of stocks held at midnight on 10th March. Notifications must be presented not later than 31st March.

The Decree also requires notification to be made of transfers or removals of goods subsequent to the date of the census.

CENSUS OF CERTAIN FUEL-PRODUCING, ETC., MACHINERY.

A Decree by the General Commissary for National Combustibles, dated 30th January (published 31st January), orders a census of various kinds of machinery suitable for the excavation of fuel, the production of firewood and charcoal, and the manufacture of briquettes, tiles, etc.

MAXIMUM PRICES FOR CERTAIN CHEMICALS.

Two Ministerial Decrees, dated 31st January and 1st February (published 8th February), fix, respectively,

IMPERIAL AND FOREIGN TRADE—continued.

maximum prices for the sale of calcium cyanamide and copper sulphate.

A Ministerial Decree, dated 6th February (published 11th February), fixes maximum prices for the sale of mineral phosphates.

PROHIBITION OF MANUFACTURE AND SALE OF SWEETS.

A Royal Decree, dated 6th January (published 18th January), prohibits, with certain specified exceptions, the manufacture of sweets after 1st February, and their sale after 1st March.

The text of the above-mentioned Decrees (in Italian), and translations thereof (excepting the two Decrees respecting mineral phosphates and sweets), may be consulted by British firms interested at the Enquiry Office of the Department of Overseas Trade (Development and Intelligence).

SWEDEN.**COMMERCIAL AND INDUSTRIAL DEVELOPMENTS.**

(From H.M. Minister.)

STOCKHOLM.

Particulars have recently appeared in the Swedish Press concerning developments in commerce and industry in Sweden, and some of these may be of interest to British firms as showing the trend of industrial and commercial enterprise in that country.

PROPOSED INTER-SCANDINAVIAN CONSORTIUM.

It was recently announced by Dr. Hamner of the Norwegian Foreign Office, in a speech on Scandinavian co-operation, that an important financial enterprise is being planned. Replying to enquiries on this subject Dr. Hamner stated that endeavours were being made by Swedish interests to form a consortium in which banks, large capitalists, and large industries in Sweden, Norway and Denmark would be interested. The purpose of the consortium, he said, would be to finance new enterprises of a commercial and industrial nature in the three countries, and, possibly, also in Finland and Iceland. Special boards, with advisors, would be appointed in each of the participating countries to prepare schemes for establishing various enterprises. A central board would be situated in the country which supplied the largest amount of capital for the consortium.

NICKEL MINING.

The old nickel mines "Klevfa Gruva," near Hvetlanda, are now being worked in accordance with modern methods, and the present owners, who purchased the mines at the beginning of 1917, intend to co-operate with a Vesteras company, which was recently founded with the object of producing electrolytic copper, as well as nickel and cobalt.

CONTEMPLATED INCREASE IN COPPER PRODUCTION.

It is reported that the production of copper from the Falu mine is to be greatly increased within the near future, and that the present output will probably be trebled. The Bessemer method is to be employed for the refining of the copper, and a converter is being erected for this purpose.

AMALGAMATION OF METAL WORKS.

A Finspongs metal works has recently absorbed the interests of another company. The capital of the former company is 3½ million kronor, and of the latter 3 million kronor.

ANALYSIS OF COAL GAS, ETC.: PROCESS TO BE UTILISED IN MINING.

A company has recently been formed for the purpose of exploiting the so-called "Mono" apparatus, which has hitherto been used chiefly for economising boiler fuel. It is now to be employed for analysing and recording gases in gas works, blast furnaces, lime kilns, brick works, etc. A special apparatus ("Gruf-mono") has been constructed for automatically analysing gases in mines, and sounding an alarm when there is danger of explosion.

MANUFACTURE OF MATS.

A new company, with a minimum capital of 70,000 kronor, has recently been founded at Stockholm, with the object of manufacturing mats and the like from fibres.

SWEDISH MATCH TRUST.

The Swedish match factories have been combined into a trust, under the name of "Svenska Tandsticksaktiebolaget," with a capital of 45 million kronor.

PURCHASING COMBINE FORMED BY PAPER MILLS.

A "joint purchase" company has recently been formed by Swedish paper mills for the purpose of making joint purchases on favourable terms. This company, which is called "Svenska Pappersbrukens Handels A/B," is said to have been joined by about forty-seven mills.

IMPERIAL AND FOREIGN TRADE—continued.**PROPOSED SULPHITE SPIRIT FACTORY.**

It is reported that a firm is planning the erection, in the course of the present year, of a sulphite spirit factory at Fagervik, which is to have an annual output of three million litres. This factory, it is stated, will be the largest of its kind in Sweden.

EXTRACTION AND UTILISATION OF FATS.

A large concern which was recently founded for the utilisation of waste fats has now purchased, in addition to the other companies which it has bought up, the interest of a Gothenburg company which has a factory for the extraction of fats from various raw materials by German processes.

GLASS WORKS COMBINE.

Five of the largest Swedish glass works have recently been combined into one company, with a minimum capital of three million kronor and a maximum capital of nine million kronor. These five works produce about two-thirds of the entire Swedish output of window glass.

REINFORCED CONCRETE SHIPS.

A Bergsund firm has recently acquired a licence to use a patented process for the construction of ferro-concrete vessels, which is owned by a Norwegian cement firm. A Malmo ferro-concrete company has amalgamated with the Bergsund firm for this purpose. It is the intention of the joint concern to devote themselves at first to the construction of motor vessels of from 500 to 600 tons, or less, and to produce standard types; subsequently, larger boats will possibly be built.

AMALGAMATION, ETC., OF SHIPPING COMPANIES.

A Swedish shipping company has recently increased its capital from nine million to ten million kronor, for the purpose of amalgamation with a recently formed joint-stock company, which has a capital of 1,375,000 kronor.

For the purpose of effecting amalgamation with another shipping concern, an important Swedish company is about to increase its capital from seven million to nine and a quarter million kronor. The amalgamation will increase the aggregate tonnage owned to about 15,000 tons.

A new shipping company, with a minimum capital of two million kronor (maximum six million kronor) is being formed at Stockholm.

EMBARGOES ON VARIOUS GOODS.**VEGETABLE OILS AND FATS.**

As from 20th February an embargo is imposed upon existing stocks of turnip and rape-seed oil (including their acids), olive, arachide, sesame and cotton seed oil, also other vegetable fatty oils, such as castor, hemp, maize, soya bean, and sunflower-seed oil. The embargo also applies to vegetable fats and waxes, such as palm-nut oil, Chinese wax, coconut oil, cocoa butter, Japan wax, and other vegetable fatty substances not assuming liquid form under ordinary temperatures.

All the above goods are placed under the control of the Industrial and National Economy Commission.

PYRITES ASH.

A Royal Decree was issued on 1st February whereby existing stocks of pyrites ash (purple ore), containing at least 0.2 per cent. of copper, and amounting to 1,000 kilogrammes or more, have been placed under embargo as from the 6th February, 1918; the embargo also applies to stocks subsequently produced in Sweden. A census of stocks under the embargo is ordered by the Decree. The provisions of the Decree place pyrites ash under the control of the Industrial Commission and empower them to requisition stocks which are not voluntarily sold to them. A complete export prohibition on cupriferous pyrites ash came into force on 9th February—the previous prohibition exempted pyrites ash containing less than 1 per cent. of copper.

RESIN.

An embargo is imposed, as from 6th February, on all existing stocks of crude resin ((kada), with the exception of stocks held by manufacturers. The provisions of the Decree place crude resin under the control of the Industrial Commission, and empower them to requisition stocks. Resin which is gathered in Sweden after 6th February may only be sold to purchasers approved by the Commission, or on its behalf. The latter have authorised Aktiebolaget Kada to act on their behalf, and to appoint approved purchasers. The embargo is imposed by a Royal Decree dated 1st February.

ARTICLES FOR BANDAGES.

By a Decree of the 1st February an embargo is placed as from 11th February, 1918, on all existing stocks of articles for bandages. The Decree places these articles under the control of the Medicaments Commission (*Täkmedelskommissionen*) and empowers them to requisition stocks.

TRANSPORT OF WASTE PROHIBITED.

The transport by rail or ship of wool and cotton waste without a licence from the Industrial Commission has been

IMPERIAL AND FOREIGN TRADE—continued.

prohibited, as from 11th February, by a Royal Decree of 1st February. Waste articles of wool and cotton (as well as animal hair) aggregating 50 kilogrammes or more were placed under embargo as from 15th October last.

ARTIFICIAL MANURES.

An embargo has been imposed as from 1st February, 1918, on existing stocks of artificial manures amounting to 100 kilogrammes or more, with exemptions whereby farmers, etc., are allowed to use their stocks in their own farming. The Decree imposing this embargo provides that artificial manures shall not be transported by rail or ship without a licence from the National Economy Commission; that manure shall not be sold without a licence; that the Commission shall be entitled to issue instructions with regard to the conditions under which a licence may be exercised; that the Commission shall be entitled to purchase and sell artificial manures; and that manures which the owner refuses to sell to the Commission on the terms offered may be requisitioned.

The object of these regulations is to place artificial manures under the control of the National Economy Commission, with a view to rationing, in view of an anticipated shortage of phosphates and nitrates.

The date of the Decree in this case is 25th January.

RESTRICTIONS ON PURCHASE OR TRANSPORT OF TANNING BARK.

A Royal Decree of the 25th January has been issued prohibiting as from the 15th February the purchase of tanning bark (of oak, fir, birch, or osier), whether existing in the country or subsequently produced there, except by purchasers approved by the Industrial Commission.

Another Decree has been simultaneously issued, prohibiting the transport of tanning bark by rail or ship without a licence from the Industrial Commission.

The object of these Regulations is to obtain control of the market and to prevent tanning bark being hoarded for the purpose of speculation.

Stocks of tanning bark of Swedish origin are at present extremely small, and the Industrial Commission have announced their intention to encourage the output of such bark during the coming season by guaranteeing the sale thereof at comparatively high, fixed prices.

ASIA.

TURKEY.

FUTURE OF THE YEMEN TRADE.

The effect of the maritime blockade along the Yemen coast has been to dislocate all commerce dependent on sea-borne traffic, while giving a great impetus to local industries. Thus, kerosene, which was in the front rank of imports before the war, and had come to be regarded almost as a necessity, has long ceased to be procurable by the public. Its place has been taken by mustard oil. Native indigo and native cotton have come into their own again, tobacco is being grown, and cereals have a far larger area devoted to them than before, while the production of coffee, on the other hand, has declined to the level of local requirements, and skins and hides have no real market at all.

This account is intended to show, by contrasting and comparing the state of trade now and before the war, what the commercial aspect in Yemen will be when the country is re-opened to maritime trade, and what steps might be taken to develop the resources of the country.

PORTS.

First, reviewing the ports of Yemen as gateways of ocean trade, Hodeidah is the only one worth considering. The inner anchorage at Loheiyah has a dangerous entrance, and only four fathoms of water when entered, while the outer anchorage where big vessels can ride is four or five miles off the town; Mokha roads only afford an anchorage of three and a half fathoms a mile off the beach, nor is it advisable to expend resources in developing that moribund town at the expense of Aden, which has long been the main maritime gate for South Yemen trade. Salif has a fairly good anchorage for steamers, but no adequate mercantile community to deal with trade. All other Yemen ports are only fit for dhow traffic, which, though deserving encouragement as a useful channel of distribution, does not justify, or indeed require, any serious outlay on harbour works.

Even at Hodeidah, those who would develop the trade facilities of Yemen should proceed with caution, having in view the mistakes made there in similar enterprises. There is no harbour at Hodeidah, but merely an open roadstead, which affords anchorage for ocean-going steamers about three miles off the beach, and for small coasting vessels within a mile. Loading and discharging are done by small local dhows. There is a well-sheltered boat harbour, protected by stone jetties and a breakwater opposite the Governorate on the centre front of the town.

IMPERIAL AND FOREIGN TRADE—continued.

This is the official landing-place for passengers, but it is useless for merchandise, as the water is too shallow for laden dhows, which load and discharge lying off a wooden jetty near the Customs on the northern front of the town.

If Hodeidah is ever to rank as an adequate gateway of Yemen trade, the town must be linked up by rail with Ras el Katib, where a harbour could be made, affording a five-fathom anchorage to a dozen steamers, and jetty accommodation for three. This was part of the ill-fated Hodeidah-Sana railway scheme, and there must still be in existence—whatever the Turks and climatic conditions have wrought with plant and gear—an embankment carrying a metre-gauge single track line from Ras el Katib past the northern outskirts of Hodeidah inland for some miles. The track is only laid for five miles out of Ras el Katib, and probably wants re-laying by now. By extending the line to Bajil, over country with an almost imperceptible rise, an ample supply of stone could be tapped for the jetty at Ras el Katib and other harbour works, instead of bringing it by inadequate dhow-loads from a remote and rocky island in the Red Sea at heavy cost, as was the case in the above-mentioned enterprise.

Such a scheme would give Hodeidah a good harbour and could be extended later as it paid its way.

So much for maritime trade; it follows that inland trade must connect with Hodeidah, and for the purposes of this article it is convenient first to consider the Hodeidah-Sana routes; then the routes north and south of this central belt, with those southerly ones whose markets are served through Aden; and finally the lateral routes which connect or intersect the above.

ROUTES AND MARKETS.

CENTRAL ROUTES.

Hodeidah-Sana.—Hodeidah has a daily market, and many tortuous bazaars, which include several European shops (Greek) where boots, shoes, lamps, cutlery, glass, European clothing, and necessities can be obtained. There is a big cloth bazaar for native and European fabrics; also quarters devoted to perfumery, Indian silks and cotton fabrics, leather work, etc., and a large number of shops selling foodstuffs and vegetables, native restaurants and cafés.

The big business of the town (coffee, skins, kerosene, bale-goods, etc.) is done chiefly by European merchants in spacious houses, which are go-downs, offices, and residences combined; kerosene is stored in special go-downs some distance beyond the outskirts of the town, not far from the beach. Nearer in towards the town are the large thatched go-downs (arishes) for storing skins and hides. Coffee is usually stored at the merchants' residences in the town. There is a considerable community of British-Indian traders, but it confines itself chiefly to imports and does not handle skins and hides. This community has suffered much from Turkish exactions during the war.

With the exception of small dyeing and weaving industries, and dhow-building along the beach south of the town, Hodeidah is not a producing centre, but its large and prosperous population gives it importance as a selling market for up-country and maritime trade, being the main gateway of Yemen commerce.

Sana, the inland and political capital, is a good selling market for European goods, and the main distributing centre for inland trade.

Intermediate markets between Hodeidah and Sana, via Menakhah, are as follows:—

Bajil.—There are large tracts of wild senna in the neighbourhood which could be much developed by organisation. Bajil is a fair market for lower-grade fabrics of European manufacture—longcloths, sheetings, etc., for native wear.

Hajjalah.—A small bazaar affords the simple commodities of native life. Too small a population to be important as a selling market.

Menakhah is a market for local produce—wheat. Not a good market for maritime trade, as the population is poor and has simple tastes, which native industries seem to satisfy. There is a bazaar and a "Europe" shop. No other markets on this route are worth considering.

Soq Seihan is another intermediate market between Hodeidah and Sana, and is on the route via Siham Valley and Wu'alan. Near the source of the Siham, in the Anis country, it is a big market for local coffee. There are no other markets of any commercial importance until the road debouches into the main plateau.

Soq Reima Shatabi is a very widely-attended market some miles west of Wu'alan. An opening exists for indigo-dyed cotton shawls and other fabrics, but this market is best worked through Wu'alan from Sana.

Hizyaz.—Trade is done through Sana.

NORTHERN ROUTES.

Hodeidah-Loheiyah-Abu Arish and Sabbia-Sadhah. Skins and hides from Abu Arish and Sabbia districts use this route owing to the excessive bulk of the goods in comparison with their weight, but Hodeidah merchants prefer coasting craft for all other goods, as being more economical, besides being immune from marauders. *Jizan* is the port for Abu Arish and Sadhah, and is chiefly a

IMPERIAL AND FOREIGN TRADE—continued.

forwarding mart for maritime trade, having dhow traffic with Jedda, Hodeidah and Aden. Direct commercial relations with Hodeidah are not practical north of the Jizan-Sadhah line; both these towns are useful centres of distribution.

Loheiyah has dhow traffic with Jedda, Hodeidah, and Aden, and is in touch with the two southerly ports by coasting steamers from Aden. Anchorage is only fit for small craft; a poor market for local produce or imports for local consumption, but a useful centre of distribution for the northern Tihamah Port for the Sudan and Khamir.

Abu Arish and *Sabbia* (the *Idrisi* capital) are both collecting centres for skins and hides bound for Hodeidah, which sends them kerosene, Hodeidah manufactured fabrics for native wear, cotton and woollen imported fabrics, sugar, matches, etc. There is a small but regular market among the *Idrisi* entourage for high-grade fabrics, hardware, glass, and foot-wear, but this is usually supplied direct from Aden via Jizan. *Sadhah* is the largest market of northern Yemen; in mercantile importance it approaches that of Sana. Compressed white raisins from Huth, and large red small-stoned dates from Nejran, are forwarded from *Sadhah* to Jizan for sea transit to Jedda, Hodeidah, and Aden. Mustard oil—for lighting purposes—is sold in large quantities for local consumption. This town is a big selling mart for kerosene oil, and European and native made fabrics (especially cotton and flannelette piece goods), matches, elastic-sided boots, crockery, and Indian silks (broad and narrow) for robes and turbans. *Sadhah* distributes and collects goods southwards as far as Khamir, the markets south of Khamir being chiefly served from Sana.

SOUTHERN ROUTES.

Hodeidah—Beit al Faqih—Dhamar.

Beit al Faqih is a market for Reimah produce (coffee), and for maritime imports to that district, such as kerosene oil, matches, and cheap lines in Manchester cotton goods.

Medinat az Abid (*Sog es-Sabt*) is a brisk market for local agricultural produce (Reimah coffee and qat). Mainly a forwarding market for *Beit al Faqih*, but will take kerosene oil, and cotton fabrics for native wear. Reimah markets can be supplied from this town.

Dhamar is an indifferent market for a fair-sized town. Kerosene is sold, but has a rival in mustard oil, which is produced locally in large quantities. Low grade fabrics for native wear are supplied from Mareb and Nisab. There are local products for an export trade.

Hodeidah—Beit al Faqih—Zabid—Yerim.

Zabid is a large market for agricultural produce from West Zabid and Nusab. Local indigo and cotton support an industry in native fabrics which has revived during the war, and may supplant any import trade in that line, but there is an opening among the wealthier population for high-grade cloth and silks. A solid market for kerosene oil. The coffee trade of Wusab can be tapped from Zabid, and imports introduced to that district, which has hitherto received inadequate attention from Hodeidah merchants.

Yerim is also a large general market, and will take kerosene oil, European foot-wear (elastic-sided boots, men's size), high and low grade cloth, and low grade Manchester cotton goods, which are forwarded to Behan for dyeing. It is the centre of a big barley-growing district, and here the maritime trade of Hodeidah touches that of Aden.

South of the Zabid-Yerim line is best left to Aden to develop.

Yemen markets on the Aden routes are as follows:—*Yerim—Sadhah—Nadhras—Qatabah to Aden via Dhala Plateau.*

Sadhah imports kerosene oil and undyed cotton goods from Aden, and links up with the dyeing industries at Mareb and Behan.

Nadhras and *Sadhah* are large forwarding marts for the Sana-Aden trade. There are mercantile agents from Sana resident at both towns.

Two other markets, *Gharbi* (or *Maghrib*) west of *Nadhras*, and *Fajrah*, south of *Gharbi*, have a brisk trade in local produce, qhi, honey, and hand-woven goat-hair rugs. They have no forwarding trade, as they are some distance off the main route, but business could be done with the mountaineers of Bedan massif through these centres.

Qatabah does a large forwarding trade with Aden in normal times, especially in kerosene oil and unbleached cotton goods. It is a market for Yafa coffee and rock salt from the Mareb and Behan districts.

Yerim—Ibb (*Udein and Jibleh traffic join up here*)—*Taiz—Mawiah via Tiban Valley to Aden.*

Ibb forwards coffee and qat from Udein and Jibleh. Is a noted market for the latter commodity, which finds its way down to Lanej and Aden, where there is a brisk and constant demand far exceeding the supply. European merchants would be well advised not to touch this product.

Taiz is the centre of the southern coffee districts (the best *Taizi* coffee is grown on J. Sabur), and roses are widely cultivated in the districts, *Taiz* being the head-

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quarters of the attar industry. This town has a large general market and bazaar, and is a useful centre of trade distribution, being situated at the junction of several routes. Aden sends hardware and cotton goods, Indian silks and native wearing apparel generally, and receives most of the exported *Taizi* coffee.

Mowiah is a small general market and does chiefly a forwarding trade, but it is not a good centre of distribution.

LATERAL ROUTES.

All these converge at Sana and may be most conveniently considered from that centre. Intermediate on the *Sana-Sadhah* route markets are Amran, Qufat Udhr, Raidhah, Khamir, and Huth.

Amran may be considered the northerly commercial outpost of Sana, and is best served by native agents resident in that city. The Turkish garrison stationed there has given abnormal importance to the place as a mart; its character and grade under other conditions cannot be considered at present. It is the centre of a barley and fodder producing district, and is a forwarding market for *Kaukaban*.

Qafat Udhr is a large forwarding market for coffee from the Ahnum valley and J. Ajmar. Large quantities of coffee husks are sold for local consumption.

Raidhah has a black powder industry.

Huth has a large community of well-to-do "ulema" and "ashraf," who are good buyers of high-grade cloth and silks for robes and turbans. It is the centre of important agricultural districts, producing white raisins, mustard oil, and dates.

There is a good market for kerosene oil, matches, fabrics of all kinds for native wear (especially flannelette and cheap woollen goods for hill wear, and European boots, which should be either elastic-sided or made to fasten with a single buckle. Trades chiefly northwards with *Sadhah*.

Intermediate markets on the *Sana-Yerim* route are *Hizyaz*, *Wu'alan*, *Mabar* and *Dhamar*.

The first two have been mentioned before (General routes). They are chiefly odder markets, but take a fair amount of retail imported goods from Sana, such as kerosene and cheap warm fabrics, coarse heavy cottons, and flannelette suitable for hill wear.

Dhamar.—Market has already been dealt with (Southern routes).

Mabar is a large market for coffee, and a forwarding market for Uthmah and the inland districts of Upper Wusab, which are not easily reached from Zabid. It supplies those districts with retailed imports from Sana, as mentioned above, receiving from them coffee and native-grown tobacco, called "tumbak aswad." Its own consumption of goods is unimportant, the population being small.

IMPROVEMENT OF COMMUNICATIONS.

Such are the principal arteries of traffic in Yemen. Before leaving this subject it may be considered how these communications could be improved. It is doubtful whether any railway extension beyond *Bajil* would be a paying proposition, at any rate until Yemen trade has much increased. Before reaching *Obal* the road is cut by two broad and deep nullahs, which join the *Siham*, and cannot be avoided by any alternative track. In and out of each valley the Turks have made graded gun roads, and for the rest, the *Siham* route to Sana via *Wu'alan* presents easier gradients than any other route from *Hodeidah* into the main plateau, not excepting the railway track via *Zadib* valley.

The Turks built the *Hodeidah-Sana* road via *Menakhah* for military rather than commercial purposes. Except for surface repairs at a few of the most difficult places it is not worth spending money on so far as trade development is concerned; for with laden camels the worst section of route governs the weight of each load. The road section up the *Hejjan* gorge from *Hajeilah* to the foot of the *Wasil* zigzag stultifies any attempt to repair this route throughout, for it is much impeded by large boulders, which are redistributed after every big spate.

The *Siham* road could be much improved for traffic by local labour, and at moderate expense. The routes of Upper Wusab would also repay moderate outlay, and the same may be said of the lateral routes on the main plateau wherever traffic is restricted by small difficult sections rather than by bad going throughout.

[NOTE.—In a further article the imports, exports, and the natural resources of the country will be dealt with.]

CHINA (Manchuria).

(From H.M. Consul.)

DAIREN.

THROUGH RAILWAY TICKETS.

According to a notice in the South Manchuria Railway Company's "Gazette," the sale of through tickets from points on the Peking-Mukden line of the Chinese Railways to others on the Chinese Eastern Railway (Russian), via

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the South Manchuria Railway, was suspended for the time being on 1st December.

SUGAR REFINING.

It is reported that a sugar refining company which was formed in Tokio at the end of 1916 for the purpose of establishing a sugar refinery near Mukden, has started working, and that the promoters of the company anticipate being able to clear a substantial profit by the close of the next financial term but one. The Manchurian beetroot crop is estimated to have yielded about 24,000 tons in the 1917 season, and, as the daily consumption of raw material at the company's works is estimated to be 500 tons, the stock in hand will be exhausted in less than two months. In the meanwhile 8,000 tons of crude sugar are to be imported from Java and Formosa, and this, mixed with the local crude beet sugar, will be used in the manufacture of the refined article.

JAPAN.

FOREIGN TRADE IN 1917.

(From H.M. Commercial Attaché.)

YOKOHAMA.

According to advance figures and a report issued by the Japanese Department of Agriculture and Commerce on 28th December, the total foreign trade of Japan for 1917 (as known up to 20th December) was valued at 2,530,577,000 yen, of which 1,540,036,000 yen represented exports and 990,541,000 yen imports—the excess of exports over imports being 549,495,000 yen. These figures constitute a record, and compared with the corresponding period (i.e., up to 20th December) of last year, when the prosperity of Japan's foreign trade was thought to have reached its zenith, the total result shows an increase of 723,649,000 yen, or 40 per cent. In exports the increase was 462,947,000 yen, or 43 per cent., and in imports 260,702,000 yen, or 35.7 per cent. The improvement was steady throughout practically the whole year.

The following statistics of Japanese trade since 1912 show at a glance the great advance that has been made:—

	Exports.	Imports.
	Yen.*	Yen.*
1912... ..	526,982,000	618,992,000
1913... ..	642,460,000	729,432,000
1914... ..	591,101,000	595,736,000
1915... ..	708,307,000	532,450,000
1916... ..	1,127,468,000	756,428,000
1917 (up to 20th December)	1,540,036,000	990,541,000

* Up to 1914 the exchange value of the yen was 2s. 0½d.; it is now about 2s. 1½d.

EXPORT TRADE.

In exports the increase has been almost general, and with the exception of cotton hosiery, woollen cloth, and hats and caps, which declined by 12,090,000 yen, 1,800,000 yen, and 9,000,000 yen, respectively, and sulphur, leather goods and camphor in which there was a smaller decrease, all the main articles of importance in Japan's export list showed an increase. In the case of cotton hosiery, political disorder in Russia, and more especially the ban on imports into the United Kingdom, which was one of the largest buyers in 1916, largely accounted for the decrease. As regards woollen cloth, the disorder in Russia was again responsible for the decline, while in hats and caps the decrease is attributed to diminished purchases by the United States, Australia, and the United Kingdom. To compensate for the loss of trade in these countries, however, there was a marked increase in exports to China and the Netherlands East Indies.

PRINCIPAL INCREASES IN EXPORTS.

Of the other principal goods exported—raw silk, cotton cloth and yarn, copper, refined sugar, habutae, coal, waste silk, tea, matches, timber, rice, etc.—all recorded particularly large gains, the increase in raw silk alone amounting to 85,850,000 yen. Although this was partly due to an advance in prices, the chief factor was the increase in purchases by the United States, where the demand for silk goods has grown.

The increase in the export of cotton cloth, some 66,960,000 yen, is one of the outstanding features of the export trade, showing as it does that Japan has, for the time being at least, captured the markets in the East which can no longer obtain their wanted supplies from Europe. Exports of cotton yarn also increased, but in value only, as there was a diminution in volume. The

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increased export of copper was due to the larger supplies that went to the United Kingdom and France, exports to Russia, which was the largest buyer in 1916, being quite small.

Habutae exports improved owing to increased purchases by the United States, while exports of refined sugar increased to the extent of 9,570,000 yen, exports being mainly to China, Siberia, and the Far East generally. In coal and waste silk the advance in prices accounts for the increase, as the volume was less than in 1916. Rice went in larger quantities to the United States and to the United Kingdom, as supplies for the Expeditionary Forces.

There was also a substantial increase in the export of many articles considered of secondary importance, such as flour, beans, beer, leaf tobacco, leather, coconut oil, soap, pencils, printing paper, window glass, brass plates and sheets, and other brass manufactures, electric machinery and wire, and shooks for tea-boxes. India, the Straits Settlements and the Netherlands East Indies shared the increase in beer; flour went largely to China and the Far East generally; tobacco to Egypt; beans to the United States; shooks to India; coconut oil to Russia and the United States; window glass, soap, printing paper, etc., to the Far East generally, as well as to India and Australia; and pencils largely to the United Kingdom.

IMPORT TRADE.

In imports the increase was not so great as in the case of exports, but in eleven out of the twenty-two chief items on the list there was a substantial increase, viz.: in rice, beans, crude rubber, raw cotton, hemp and flax, saltpetre, oilcake, pig iron, iron ingots, shapes, plates, pipes and tubes, and machinery.

PRINCIPAL INCREASES IN IMPORTS.

Notwithstanding the ban on the export of steel from the United States, the import of steel as well as machinery into Japan in 1917 created a record. In steel plates and shapes the increase amounted to 96,790,000 yen, which may afford some idea of the industrial activity of the country during the year; the requirements of these goods being mostly for shipbuilding and for the manufacture of various kinds of machinery. The imports came chiefly from the United States.

As regards imports of raw cotton, the increase of 48,540,000 yen, almost wholly from the United States and India, was due to the rapidly increasing demand for Japanese cotton goods in India, China, the East generally, and in other countries. The increase in imports of wool amounted to 16,480,000 yen, but this was due mainly to the increase in price, as the quantity was only slightly larger than in 1916. Owing to the restrictions imposed on Australian wool, Japan had to obtain the bulk of her supplies from South Africa. Considerable purchases were also made in South America.

Imports of oilcake increased by 18,040,000 yen, owing to its use as a substitute for sulphate of ammonia as a fertiliser, the price of the latter having advanced considerably since the beginning of the year. The increase in imports of machinery amounted to 14,390,000 yen, most of the imports being from the United States and the United Kingdom, with a lesser amount from Sweden. Larger shipments of hemp from Manila to provide for the growing hemp spinning and weaving industry accounted for the rise in imports of that commodity. In iron—pig and ingot—the increase of 8,120,000 yen was due to enhanced prices, and did not denote an increase in quantity.

Imports of less importance which recorded a substantial increase were as follows:—Malt (due to the increased beer export), tallow for soap and glycerine making; morphine; precious stones (chiefly diamonds); rails; motor cars (up to October 622 cars had been imported, almost all from the United States, as compared with 174 for the corresponding period of 1916); copra for the manufacture of coconut oil (already mentioned in connection with exports), sulphate of ammonia from the United Kingdom (owing to the increased domestic output an export business has been commenced in this article, and supplies from the United Kingdom will probably diminish hereafter); and caustic soda and soda ash mainly from the United States.

PRINCIPAL DECREASES IN IMPORTS.

Chief amongst the articles in which a decrease was recorded were sugar, skins and hides, pulp for paper-making, lead, brass and yellow metal, cotton cloth, paper, petroleum, and iron nails. In the case of pulp, the development of the domestic industry accounts for the diminution, while decreased orders for army boots from Russia was the chief reason for a falling-off in imports of hides and skins to the extent of 2,820,000 yen. The decrease of 1,774,000 yen in the import of iron nails is said to be due to the increased output of Japanese nail makers, and partly also to the fact that in 1916 a shortage of wire rods prevented Japanese factories from working at full capacity, which led to a larger import of nails in that year.

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JAPAN. CHINA.

PROJECTED SINO-JAPANESE BANK.

The following particulars relative to the proposed establishment of a Sino-Japanese Bank are taken from data furnished by H.M. Embassies at Tokio and Peking, and from information contained in a recent issue of the "Japan Chronicle."

The projected bank, which will be called in Japanese the "Nisshin Kawaze Ginko" and in English "The Chartered Exchange Bank of China," is to have a capital of 10,000,000 yen, of which one-half is to be subscribed by Japanese and the other half by Chinese interests. The Japanese portion is divided into 50,000 shares of 100 yen each. Of this amount the Tokio and the Osaka syndicate banks have subscribed for 1,000 and 500 shares, respectively, and various important Japanese industrial and shipping companies (including, in the latter case, the Nippon and Toyo companies) have taken up 1,000 shares each. Thus about 20,000 shares have been taken up, and the remaining 30,000 shares will be undertaken by the Japan Industrial Bank, the Bank of Korea (Chosen) and the Bank of Formosa (Taiwan). The largest of the Chinese shareholders are the Bank of China and the Bank of Communications, whilst it is understood that many prominent Chinese officials have, in their private capacity, subscribed to the capital.

The head office of the bank will be established in Peking, with branches in Shanghai, Tientsin, and Tsinan. The heads of these branches will be Chinese, but the managers Japanese, who will direct actual business. Though the institution is in name an exchange bank, its operations will comprise all the usual banking transactions, in addition to exchange business, including the issue of international money orders.

It is understood that as there may be some difficulty in finding the Chinese share of the capital, it will probably be advanced by the Japanese side. It is thought that it will be difficult for an exchange bank to operate unless it has branches in London and New York, and also that the capital will have to be increased if the bank is to undertake exchange business on a large scale.

UNITED STATES OF AMERICA.

PAYMENT OF UNITED STATES PATENT OFFICE FEES ON "ENEMY" OWNED PATENTS. ETC.

The War Trade Board has authorised the payment of United States Patent Office fees requisite for the filing, prosecution, registration, and preservation of patents, trade-marks, prints, labels, or copyrights of an "enemy" or "ally of enemy" by any person within the United States where such person is the holder of a power of attorney granted by such "enemy" or "ally of enemy"; provided, however, that when such fees are to be paid from the funds of any "enemy" or "ally of enemy" in the United States, such payment shall be made subject to the approval of the Alien Property Custodian.—(*Commerce Reports*, 26th January.)

PROTESTS OF "ENEMY" PAPER.

The War Trade Board has authorised all persons in the United States holding notes, cheques, or drafts, upon which the name of an "enemy" or "ally of enemy" appears, or the handling of which involves in any way trading with, or for, or on behalf of an "enemy" or "ally of enemy," to perform such acts as may be necessary to perfect their rights against those secondarily liable on such notes, cheques, or drafts, in the event of acceptance or payment on such drafts or cheques, or payment on such notes being refused. This authorisation, however, does not legalise the presentation of any drafts, cheques, or notes for acceptance or payment, or the receipt of payment on any drafts, cheques, or notes upon which the name of an "enemy" or "ally of enemy" appears, or where such presentation would involve trading with, or for, or on behalf of an "enemy" or "ally of enemy," without a licence from the War Trade Board.—(*Commerce Reports*, 26th January.)

SALE OF ENEMY PROPERTY.

The sale of all enemy alien property in the United States is proposed by a measure which has been favourably reported upon by the State Appropriations Committee. The Committee have also accepted an amendment authorising the purchase by the Government of the German-owned steamship piers in the City of Hoboken, New Jersey. During the war these docks and wharves will be used by the Government. The Alien Property Custodian has stated that the proceeds of sale will be

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deposited in the United States Treasury until after the war, when their disposition would be determined by the peace terms. He also said that the proposed action was similar to that taken by Germany with regard to American property in Germany. The principal provision of the amendment authorising the sale of enemy property reads:—"The Alien Property Custodian shall have power to manage such property; to do any act or things in respect thereof, or any part thereof, by sale or otherwise, and to exercise the rights and powers which may be or become appurtenant thereof, or to the ownership thereof, in like manner as though he were the absolute owner." Another provision authorises the Custodian to buy Government Bonds, Certificates or Indemnities from the proceeds paid into the Treasury. The provision for the future disposition of these proceeds reads:—"After the end of the war any claims of any enemy or of an ally to money or other property received and sold by the Alien Property Custodian, or deposited in the United States Treasury, shall be settled as Congress shall direct." This enactment of the Legislature does not mean that all German property will be sold. The Government will immediately dispose of only such property as can be disposed of to financial advantage. In other cases the property taken over will be managed by the Government, and the revenue placed in the United States Treasury, together with the funds derived from sales outright. The statement of Trust Accounts to 28th February shows that the alien enemy property taken over is valued at 181,732,538 dols. Some items taken over are unmarketable, and the Government are unable to realise them at their par value. This category includes "accounts receivable" amounting to 49,755,243 dols. All stocks, real estate, cotton, foodstuffs or agricultural produce, and metals and minerals will be sold. The Committee, in accepting the amendment to authorise the purchase of the Hoboken piers, gives the President authority to acquire the title to docks, piers, terminal equipment and facilities on the Hudson river now owned by the North German Lloyd Dock Company and the Hamburg-American Terminal Navigation Company, "if he deem it necessary for national security or defence."—(*Admiralty, per Wireless Press.*)

CURTAILMENT OF OUTPUT OF PLEASURE MOTOR CARS.

The National Automobile Chamber of Commerce, representing the chief motor manufacturers of the country, have decided to curtail the output of pleasure cars in 1918 by 30 per cent. The order also plans the manufacture in a greater degree of trucks, motors, etc., for war purposes.—(*Admiralty per Wireless Press.*)

LATIN AMERICA.

ARGENTINA.

LAW GOVERNING EXPENDITURE ON NATIONAL PUBLIC WORKS.

A translation of a Law and of a Decree published in the "Boletin Oficial" of the 14th November which is of interest to British prospective contractors in and traders with the Argentine Republic, has been forwarded by H.M. Minister at Buenos Aires.

The Law (No. 10,285 of 31st October, 1917) lays down that funds authorised for a public work must be allocated to that work alone, and that any balance of the sum allotted which there may be at the end of one financial year must be carried over to the following year. Under this Law funds which are voted for public works will not now be available for other purposes.

The Decree referred to, dated 5th November, rescinds the powers given to the National Sanitation Works Department—one of the large purchasing Departments of the Argentine Government—to purchase their materials without the sanction of the Executive.

BRAZIL.

GERMAN INFLUENCE IN BAHIA TOBACCO TRADE.

(From the Acting British Consul.)

BAHIA.

Before the war over two-thirds of the total tobacco crop of Bahia was bought by Germans and shipped to Hamburg and Bremen. The average crop is between 300,000 and 400,000 bales, so that about 250,000 bales were in the hands of Germans. In 1915 the Germans again held the bulk of the trade. In 1916, however, the

IMPERIAL AND FOREIGN TRADE—continued.

Germans only bought 100,000 bales, or roughly one-third to one-fourth of the crop. Last year, after sales up-country for the 1918 crop had been in full swing for over eight weeks, no Germans were known to have entered the market, or if they had it was done so quietly and the tobacco was bought in such small parcels, that it did not amount to any very great quantity.

Tobacco suffers like cocoa and most of the other products of Brazil in that while they will keep indefinitely in a cold climate they will not keep long in the countries in which they grow.

With regard to the future of German trade in tobacco in Bahia after the war it is perhaps too early to say that the monopoly is definitely broken, but it has undoubtedly received a bad blow. A number of Brazilian firms who were just able to struggle along before the war have made large fortunes in the last eighteen months, and will not only be wholly independent of German money in future but will be keen competitors. It is said, and it is believed with a certain amount of truth, that some Brazilian firms have made about £80,000 clear profit, while others have made over £50,000. Many small up-country packers who have had £1,000 or so of capital have doubled and trebled it this last year. These will probably suffer later if the Germans attempt to get the monopoly again; but it is doubtful whether the latter will be able to harm the wealthy firms.

OPENINGS FOR BRITISH TRADE.

[NOTICE TO MANUFACTURERS AND EXPORTERS.—*Strict precautions should be taken against trading with the enemy and regard had to the restrictions on trading in certain goods (including Priority Certificate requirements) and to the special regulations governing trade with certain countries. In cases of doubt or difficulty reference should be made personally or by letter to the Department of Overseas Trade (Development and Intelligence).*

British firms may obtain the names and addresses of the persons or firms referred to in the following notices of "Openings" by applying to the Department and quoting the specific reference number. Even though trade may not be possible it may be worth while for British firms to open up communications now with a view to future trade.]

UNITED KINGDOM.

NEW SOURCES OF SUPPLIES REQUIRED.—Applications are frequently received at the Department of Overseas Trade (Development and Intelligence), from firms in all parts of the United Kingdom, and abroad, who wish to get into communication with British manufacturers or producers of various classes of goods with a view to obtaining supplies.

Applications have been recorded during the past week for the names of manufacturers or producers of the following (amongst other) articles; British manufacturers or producers of these articles now in a position to supply are invited to make application for the names of the enquirers:—

- Copper and asbestos washers.
- Corset steels, twisted wire, as previously made in Germany.
- Machinery for making screw parts of corkscrews.
- Sprinklers for perfume bottles.
- Thermostats, automatic or adjustable, for electric incubators.

PASTE POWDER.

An enquiry has been received at the Department of Overseas Trade (Development and Intelligence) from a firm desirous of getting into touch with United Kingdom manufacturers of chemicals or other products who would be prepared to consider the possibility of producing a paste powder. The paste powder is required for making a strong adhesive paste for box-making and other uses. The article would, of course, be required to comply with the Food Controller's Order prohibiting the use of any food substance in the manufacture of paste.

United Kingdom manufacturers who would be prepared to consider this proposition should communicate in the first place with the Department.

CANADA.

MARKET SOUGHT FOR CANADIAN GLACIAL ACETIC ACID.—A Canadian company, manufacturing glacial acetic acid upon a large scale, would be glad to receive enquiries from United Kingdom firms wishing to purchase supplies.

IMPERIAL AND FOREIGN TRADE—continued.

MARKET SOUGHT FOR CANADIAN DISPLAY FIXTURES.—A Canadian company manufacturing display fixtures, including wax figures and forms, garment hangers and racks, metal stands, etc., asks to be placed in correspondence with United Kingdom buyers of these goods.

Communications in regard to the foregoing should be addressed to the Canadian Government Trade Commissioner, Portland House, Basinghall Street, London, E.C. 2.

NEW ZEALAND.

H.M. Trade Commissioner in New Zealand reports the receipt of the following enquiries:—

ATTACHE CASES, Etc.—A firm in Wellington, at present selling foreign-made attaché cases, desires to make arrangements for obtaining United Kingdom goods of this class, both in imitation and real leather, for trade after the war; and with this object in view would like to get into communication with manufacturers of the goods mentioned. [Reference No. 59. See Notice to Manufacturers and Exporters above.]

SOFT GOODS.—A Christchurch firm wishes to get into touch with United Kingdom manufacturers of the following goods who desire to be represented in New Zealand:—Soft goods lines in general, particularly shirtings, blouse materials, hosiery and gloves. The firm proposes to cover the whole of the Dominion, and would like to obtain sole New Zealand agencies. The firm would be willing to carry stocks of any of the lines and to sell on commission on certain terms. [Reference No. 60. See Notice to Manufacturers and Exporters above.]

SOUTH AFRICA.

HARDWARE AND SOFT GOODS.—H.M. Trade Commissioner in South Africa reports that a Johannesburg firm desires to obtain agencies for United Kingdom manufacturers of hardware and soft goods. [Reference No. 61. See Notice to Manufacturers and Exporters above.]

CHINA.

JINRIKSHA TYRES, RUBBER SOLES.—H.M. Consul at Hangchow writes with reference to the notice on p. 680 of the "Board of Trade Journal" of 27th September, 1917, that the statement that bicycle tyres have a considerable sale in his district is inaccurate, and that the rubber goods to which reference was made in his report are jinriksha tyres and rubber soles for boots.

FRANCE.

SOAP, HOUSEHOLD ARTICLES, HARDWARE, Etc.—H.M. Consul-General in Paris reports that he has received an application from an agent at Vincennes, Seine, who wishes to represent United Kingdom manufacturers of the following goods in Paris and throughout France:—Soaps, perfumery, toilet articles, household articles (including kitchen utensils, cutlery, brushes, mirrors and looking-glasses), hardware, leather goods, sporting requisites, sticks and umbrellas, all kinds of toys, jewellery, and canned goods. [Reference No. 58. See Notice to Manufacturers and Exporters above.]

SPAIN.

TAPESTRY, CLOTH, SANITARY MATERIAL, Etc.—H.M. Consul in Madrid reports that a dealer in tapestry in that city desires to get into touch with United Kingdom manufacturers of tapestry, cloth, sanitary fittings, and ironmongery, with a view to obtaining agencies therefor. The enquirer claims to have wide local connections.

[Reference No. 62. See Notice to Manufacturers and Exporters above.]

VENEZUELA.

TOYS, GLASSWARE, Etc.—H.M. Vice-Consul at Caracas reports that a firm in that city desires to obtain agencies for United Kingdom manufacturers—particularly for manufacturers who are exhibiting at the British Industries Fair—of toys, glass bottles, table and fancy glassware, especially glassware of the kind formerly imported into Venezuela from Bohemia. It is understood that a catalogue of the Bohemian glass referred to has been forwarded by H.M. Vice-Consul; when it is received it will be available for inspection by British firms interested at the Enquiry Room of the Department of Overseas Trade (Development and Intelligence). [Reference No. 63. See Notice to Manufacturers and Exporters above.]

Government Notices affecting Trade.

EXPORT AND IMPORT SECTION.

AMENDMENTS AND ADDITIONS TO LIST OF PROHIBITED EXPORTS.

An Order of Council, dated 8th March, orders that the Schedule to the Proclamation dated 10th May, 1917, prohibiting the exportation from the United Kingdom of certain articles to certain or all destinations*, should be amended as follows:—

(1) That the following headings should be deleted:—

- (C) Bedding (not including bedsteads, and parts thereof).
- (C) Belting, woven hair.
- (C) Blankets.
- (C) Bristles.
- (C) Brooms and brushes, except dandy brushes.
- (A) Camel fleece, khaki.
- (C) Carpets and carpet rugs made wholly or partly of wool or hair.
- (C) Flax and linen, made-up articles of wearing apparel wholly or partly manufactured of.
- (C) Hair, all manufactures, mixtures and products of, not otherwise specifically prohibited.
 - Hemp and hemp manufactures, the following:—
 - (A) Italian, Russian and Manila hemp, maguey fibre, and manufactures thereof, except tagal braid.
 - (B) Other hemp and manufactures thereof, not otherwise specifically prohibited.
- (B) Hides, raw, manufactures of, the following:—
 - Pickers, drop box pickers, pinions, centres and other goods manufactured from raw hide, suitable for textile machinery.
 - Leather goods of the following descriptions:—
 - (B) Belting, leather manufactures suitable for textile machinery and leathers cut or shaped for hydraulic or pump purposes.
 - (C) Leather waste.
- (C) Rugs (except horse rugs).
 - Silk and silk manufactures, the following:—
 - (C) Articles of clothing for men's wear manufactured from tissues and fabrics of silk of all kinds (including artificial silk), whether pure or mixed with other yarns or material, in the grey, or discharged, undyed, dyed or printed, unweighted or weighted.
- (C) Tissues manufactured wholly or partly of wool or hair (except khaki woollen or worsted cloth).
 - Wool and wool manufactures, the following:—
 - (A) Khaki cloth made from wool or from mixtures of wool with other materials.
 - (B) Scarves, shawls, jerseys, cardigan jackets, men's gloves, men's socks, men's hosiery and men's underwear of all kinds manufactured wholly or partly of wool.
 - (B) Stockinette manufactured wholly or partly of wool.
 - (C) Wool, all manufactures, mixtures and products of, not otherwise specifically prohibited.

(2) That the following headings should be added:—

- (B) Bedding (not including bedsteads and parts thereof).
- (B) Belting, woven hair.
- (C) Belting not otherwise prohibited.
- (B) Blankets manufactured wholly or partly of wool or hair.
- (C) Blankets not otherwise prohibited.
- (B) Bristles.
- (C) Brooms and brushes not otherwise specifically prohibited.
- (A) Brushes, tooth.
- (B) Carpets and carpet rugs made wholly or partly of wool or hair.
- (C) Carpets and carpet rugs not otherwise prohibited.
- (B) Felt made wholly or partly of wool or hair (except roofing felt and saddle felt).
- (C) Flax and linen, made-up articles of wearing apparel wholly or partly manufactured of, not otherwise prohibited.

* The prohibition of exports is as follows:—

Goods marked (A) to all destinations;
Goods marked (B), to all ports and destinations abroad other than ports and destinations in British Possessions and Protectorates;

Goods marked (C) to all destinations in foreign countries in Europe and on the Mediterranean and Black Seas, other than France and French Possessions, Russia, Italy and Italian Possessions, Spain and Portugal, and to all ports in any such foreign countries, and to all Russian Baltic ports.

GOVERNMENT NOTICES AFFECTING TRADE— continued.

- (B) Hair, all manufactures, mixtures and products of, except such as are prohibited to all destinations.
 - Hemp and hemp manufactures, the following:—
 - (A) Hemp of all kinds (including Indian hemp used in textile manufacture), Maguey fibre and manufactures thereof, except tagal braid.
 - Hides, manufactures of, the following:—
 - (A) Pickers and drop box pickers.
 - (B) Pinions, centres and other goods manufactured from hide, suitable for textile machinery, not otherwise specifically prohibited.
 - Leather goods of the following descriptions:—
 - (B) Belting, leather manufactures suitable for textile machinery (except pickers and drop box pickers) and leathers cut or shaped for hydraulic or pump purposes.
 - (A) Leather waste.
 - (A) Pickers and drop box pickers.
- (B) Rugs manufactured wholly or partly of wool or hair.
- (C) Rugs not otherwise prohibited.
 - Silk and silk manufactures, the following:—
 - (C) Articles of clothing for men's wear, not otherwise prohibited, manufactured from tissues and fabrics of silk of all kinds (including artificial silk), whether pure or mixed with other yarns or material, in the grey, or discharged, undyed, dyed or printed, unweighted or weighted.
 - Wool and wool manufactures, the following:—
 - (B) Wool, all manufactures, mixtures and products of, except such as are prohibited to all destinations.

APPLICATIONS FOR LICENCES TO EXPORT COMPOUND ARTICLES.

The Director of the War Trade Department refers to the terms of the notice which appeared in the "Board of Trade Journal" of the 22nd November, 1917, relating to "applications for licences to export compound articles" (which required the exact composition and proportion of the constituents contained in all compound articles to be furnished to the Department) in which exporters are invited to state in all cases *inter alia*:—

- (1) The percentage of any export prohibited ingredient entering into the composition of the articles; and
- (2) The exact nature of any prohibited ingredient, *e.g.*, starch should be described as rice starch, maize starch as the case may be, and similarly sugar should be described as cane sugar, malt sugar, etc.

It is obvious from the terms of the notice that the information asked for was desired with a view to prevent the necessity for subsequent enquiries and so expedite business. The Director is, however, prepared to consider in regard to any article which is of secret manufacture and the disclosure of the composition of which may injuriously affect trade rights, to dispense with a full disclosure so long as sufficient information is given to enable him to form a definite conclusion as to whether, and if so to what extent, the article or any ingredient used in the manufacture thereof, falls within a prohibition upon export.

The Director therefore notifies that when any person desires to export any compound goods and claims that they are manufactured from a secret formula which is carefully guarded, and that the disclosure may injuriously affect his trade rights, it shall be a sufficient compliance with the notice if the trader makes a statutory declaration with regard to the goods disclosing particulars to the effect following:—

- (1) The name of the ingredients, if any, which are prohibited and the percentage proportion by weight or volume as the case may be of the same;
- (2) The names of the other ingredients which he is willing to disclose;
- (3) The number of the ingredients not disclosed, stating the percentage proportion by weight or volume as the case may be which such undisclosed ingredients bear to the whole product;

together with a statement that the declarant has carefully examined all prohibited lists up to date and that none of the undisclosed ingredients are prohibited.

This declaration will only be accepted upon an undertaking that a further examination of all prohibited lists issued subsequently to the date thereof will be made from time to time, and that another declaration will be given in the event of any further information affecting the goods either by any addition to or removal of the prohibitions being disclosed thereby.

Forms of the Statutory Declaration can be obtained upon application to the Secretary of the War Trade Department, 4, Central Buildings, Westminster, London, S.W. 1.

GOVERNMENT NOTICES AFFECTING TRADE— *continued.*

EXPORT OF HAIR YARNS.

The Director of the War Trade Department desires to give notice that no encouragement can be given for the spinning of hair yarns for export save in some special cases where allocations have been made to Allied countries.

Applications for licences will, however, be considered in respect of yarns already spun and ready for shipment to Allied countries provided applicants are able to produce evidence that the yarns in question are totally unsuitable for use in this country.

PARCEL POST TO ADEN.

The parcel post to Aden, which had been suspended except for parcels to Naval and Military addresses, has now been re-opened for goods consigned to civil addresses, with the following exceptions:—

- | | |
|-------------------------|----------------------------|
| 1. Betel leaves. | Tissues : |
| 2. Betel nuts. | of linen, |
| 3. Cardamoms. | of ramie, |
| 4. Cloth (see Tissues). | of silk, of floss silk |
| 5. Cutlery. | pure or mixed with |
| 6. Gavla seeds. | other material, tex- |
| 7. Glass beads. | tures and tissues of |
| 8. Lamp burners. | all sorts, and arti- |
| 9. Perfumery (soap and | ificial silk. |
| other). | 12. Tobacco in leaves, and |
| 10. Sandal wood. | all other kinds, in- |
| 11. Tissues : | cluding cigarettes. |
| of hemp, | 13. Watches. |
| of cotton, | 14. Wool : |
| of animal mane and | Gloves, wastes, rags, |
| tail, | tissues, threads, wrap- |
| of jute. | pers, other kinds. |

It should be noted, however, that parcels for civil addresses containing boots and shoes, medicaments, tea, cigars, and hosiery will not be accepted if they exceed 5 lb. each in weight.

[APPROVED CONSIGNEES IN CHINA.

The Foreign Trade Department of the Foreign Office notifies that the following additions to, and corrections in the list of persons and bodies of persons to whom articles to be exported to China may be consigned, have been made:—

ADDITIONS.

Auto Castle, Shanghai.
Economou, Demetrios, Tientsin.
Heimendinger, J., Shanghai.
Tipper and Fenton, Tientsin.
Union Eastern Trading Company, Shanghai.

CORRECTIONS.

Chotirmall, K. S., Canton, *should read*—Chotirmall, K. A. J., Canton.
Currimbhoy Company, Limited, Shanghai, *should read*—Currimbhoy Company, Limited (late Pabaney, E., Shanghai).
P. Heath and Company, Shanghai, *should read*—P. Heath and Company, Shanghai, Tientsin.
Pabaney, E., *should read*—Pabaney, E. (see Currimbhoy Company, Limited, Shanghai).

IMPORT RATIONINGS FOR CERTAIN HARDWARE ARTICLES.

With reference to the notices at pp. 76 and 105 of the issues of the "Board of Trade Journal" of 17th and 24th January, it is notified that firms desiring to import any of the articles covered by the rationing scheme referred to therein should apply as soon as possible to the Department of Import Restrictions, 22, Carlisle Place, London, S.W. 1.

The last date for receiving such applications is 31st March, 1918.

CONTROL OF PAPER.

TRANSFER OF POWERS OF ROYAL COMMISSION.

The following is the text of the Controller of Paper Order, 1918, dated 9th day of March, 1918, made by the Board of Trade pursuant to Regulations 2F to 2JJ of the Defence of the Realm Regulations:—

Whereas His Majesty was pleased by His Royal Warrant, dated 4th day of June, 1917, to establish a Commission, called the Royal Commission on Paper, and was thereby pleased to assign certain duties to the said Royal Commission respecting paper and paper making materials;

And whereas His Majesty was pleased by His Royal Warrant, dated 8th day of March, 1918, to dissolve the said Royal Commission;

And whereas the Board of Trade have, in exercise of the powers conferred upon them by Regulations 2F to 2JJ made certain Orders as respects paper and paper

GOVERNMENT NOTICES AFFECTING TRADE— *continued.*

making materials, and particularly Orders known as the Paper Restriction Order No. 5, 1917, the Paper Restriction (Posters and Circulars) Order, 1918, and the Paper Restriction Order, 1918, which said Orders contain references to the said Royal Commission and give authority to the said Commission to exercise certain powers and duties on behalf of the Board of Trade as respects paper;

And whereas the Board of Trade have, on the dissolution of the said Royal Commission, appointed an officer to be called the Controller of Paper and have assigned to him certain duties respecting paper and paper making materials;

Now therefore the Board of Trade, in exercise of the powers conferred upon them by Regulations 2F to 2JJ of the Defence of the Realm Regulations hereby order as follows:—

1. The words "the Controller of Paper" shall be substituted for the words "the Royal Commission on Paper" wherever they occur in any of the above recited Orders or in any other Orders made by the Board of Trade.
2. The Controller of Paper for the time being may exercise all the powers heretofore conferred by the Board of Trade on the Royal Commission on Paper.
3. Where any Order respecting paper or paper making materials heretofore made gives power to the Board of Trade to grant licences dispensing with any of the provisions of such Order such licence may be granted on behalf of the Board of Trade by the Controller of Paper, unless the Board otherwise direct.
4. This Order may be cited as "The Controller of Paper Order, 1918."

PAPER MAKING MATERIALS (HOME PRODUCED).

PERMITS TO BUY.

A Paper Making Materials (Home Produced) Order, 1918, dated the 13th day of March, 1918, has been made by the Board of Trade under Regulations 2F, 2G, and 2JJ of the Defence of the Realm Regulations, as follows:—

1. On and after 1st April, 1918, no person shall buy or offer to buy any material produced or collected in the United Kingdom for the purpose of using or disposing of it for the manufacture of paper, cardboard, millboard, or other similar goods, except under, and in accordance with the terms of a permit granted by the Controller of Paper.

2. On and after 1st April, 1918, no person shall sell, or offer for sale any material produced or collected in the United Kingdom with intent that it may be used for the manufacture of paper, cardboard, millboard, or other similar goods, except to the holder of and in accordance with the terms of such a permit as aforesaid.

3. Every dealer in paper making material produced or collected in the United Kingdom, hereinafter referred to as "a dealer," shall supply, during the year ending 31st March, 1919, to those customers to whom he supplied such material during the six months from 1st September, 1917, to 28th February, 1918, if required by them twice the amount of each of the same class of such materials as he supplied to such customers during the said six months provided that:—

- (a) the dealer has been granted a permit to buy material;
- (b) reasonable notice has been given by the customer of his requirements;
- (c) the dealer's supplies of material are sufficient to meet such requirements;
- (d) if the dealer's supplies are not sufficient to meet all requirements of which he shall have had notice, he shall distribute his available stock between the customers from whom he has received notice *pro rata* to the amounts supplied to them during the said six months, or as the Controller of Paper may direct;
- (e) any balance of stock that remains after supplying such customers with the amounts to which they are entitled under this paragraph shall be disposed of as the Controller of Paper direct;
- (f) the Controller of Paper may in writing excuse the fulfilment by a dealer of any requirement or any part thereof if in his opinion the execution thereof is impossible or unreasonable.

4. The notice referred to in the last preceding paragraph shall refer to the customer's requirements during each six monthly period ending 30th September, 1918, and 31st March, 1919. In default of such notice he shall not be entitled to receive supplies. Any question as to the sufficiency or reasonableness of such notice shall be determined by the Controller of Paper. Such notice shall not, unless by consent of the parties, be withdrawn.

5. From and after the date of this Order no dealer without the consent of the Controller of Paper, shall

GOVERNMENT NOTICES AFFECTING TRADE—
continued.

sell for the manufacture of any of the articles mentioned in paragraphs 1 and 2 hereof any material produced or collected in the United Kingdom at a price exceeding the average price charged by him to the same customer for the same class of material during the said period of six months referred to in the last paragraph, and if the sale is to a customer who was not supplied by such dealer during the said period the price shall not exceed the highest average price charged by such dealer to any customer of his during the said period.

6. The provisions of paragraphs 1 to 5 inclusive shall not apply to wood, straw, or raw vegetable fibre unless and until the said paragraphs are applied hereto by notice given by the Controller of Paper, nor shall the said paragraphs apply to sales or purchases not exceeding 2 cwt. at one time if such sales or purchases are not part of a transaction or series of transactions involving the sale or purchase of a greater quantity. Such notice may alter or modify the dates and period referred to in paragraphs 3 and 4 hereof as the Controller of Paper may deem expedient.

7. The owner of every mill or factory in which paper, cardboard, millboard, or other similar goods are made, and, if the owner is a company, the secretary of such company shall send to the Controller of Paper, on Monday in each week, a true return showing the quantities of each description of paper-making materials produced or collected in the United Kingdom delivered to them during the week preceding the date on which such return is made and such return shall give the names and addresses of the persons from whom the said materials were bought, and the prices paid therefor.

8. Nothing in this Order shall apply to waste paper as defined in an Order dated 15th May, 1917, made by the Minister of Munitions and the provisions of the said Order shall not be affected by this Order.

9. All persons shall obey the instructions of the Controller of Paper relating to the purchase, sale, distribution, supply, transport, or storage of or the giving of information as to paper-making materials produced or collected in the United Kingdom.

10. Infringements of this Order are summary offences under the Defence of the Realm Regulations.

11. This Order may be cited as the Paper-Making Materials (Home Produced) Order, 1918.

FOOD ORDERS.**BACON, HAM AND LARD (PROVISIONAL PRICES) ORDER, 1917.**

By a Notice dated the 8th March, 1918, made under the Bacon, Ham and Lard (Provisional Prices) Order, 1917, the Food Controller has raised the maximum first-hand prices which may be charged by refiners, in the United Kingdom, of lard imported unrefined from the United States of America, Argentina or Canada. The new prices are 15s. per cwt. on the occasion of a sale direct to a retailer, and 15s. 2d. per cwt. for other sales. The increase has been rendered necessary by the increased cost of raw lard in the countries of origin.

FRESH MEAT FOR MANUFACTURING PURPOSES.

Persons and firms using fresh meat for manufacturing purposes have been notified that they are required to obtain from the Secretary (Meat Section), Ministry of Food, Palace Chambers, London, S.W. 1, before 15th March, forms of application for licences to carry on business as manufacturers of meat products (excluding bacon, ham and lard).

THE LONDON CENTRAL MARKETS ORDER, 1918.

This Order prohibits retail sales within the wholesale sections of Smithfield Market, and contains provisions for the Food Controller giving directions as to the sale and distribution of meat in the market.

THE FOOD CONTROL COMMITTEES (LOCAL DISTRIBUTION) AMENDMENT ORDER, 1918.

This Order is an extension of the Food Control Committees (Local Distribution) Order, 1917, under which Food Committees have been able (by adopting a scheme with the consent of the Food Controller) to control the distribution of an article of food. The present Order gives Food Committees larger powers for the regulation of distribution and consumption.

THE MILK (SUMMER PRICES) ORDER, 1918.

This Order fixes the maximum prices at which milk may be sold by producers, by wholesale dealers and by retailers during the months from April to September, 1918, inclusive.

THE MILK (REGISTRATION OF DEALERS) ORDER, 1918.

In addition to dealings permitted by the above Order, certain other dealings have been licensed by general licences dated 8th March.

THE FOREIGN HOLDINGS (RETURNS) ORDER, 1918.

See page 318.

GOVERNMENT NOTICES AFFECTING TRADE—
*continued.***TEXTILE MATERIALS.****THE SALE OF WOOL (UNITED KINGDOM) ORDER, 1918.**

The Army Council have issued the following Order, entitled as above, and dated 5th March:—

1. No person shall sell any raw wool grown or to be grown on sheep in Great Britain, Ireland, or the Isle of Man during the season of 1918, except gathered wool or unwashed daggings or clarts, otherwise than to persons authorised by or on behalf of the Director of Raw Materials.

2. No person shall make delivery of or payment for any wool of the description aforesaid otherwise than in accordance with the provisions of this Order, whether in pursuance of any contract entered into prior to the date hereof or otherwise.

3. All persons having in their custody or control any stocks of wool of the description aforesaid are hereby required to sell such wool to any person authorised by or on behalf of the Director of Raw Materials as may be required by him or on his behalf, and to make delivery to such persons in such quantities and at such times and places as may be specified by him or on his behalf.

4. All persons having in their custody or control any stocks of wool of the description aforesaid are hereby required to furnish such particulars thereof as may be required by or on behalf of the Director of Raw Materials.

5. No person carrying on the business of a manufacturer of woollen, worsted or hosiery goods in any textile factory or workshop in Great Britain, Ireland, or the Isle of Man, shall, without a permit, issued by or on behalf of the Director of Raw Materials, spin, draw, reel, or weave for the use of the grower thereof any wool grown or to be grown on sheep in Great Britain, Ireland, or the Isle of Man during the season of 1918, excepting gathered wool.

6. No person shall, without a permit issued by or on behalf of the Director of Raw Materials, make or take delivery of any wool whatsoever grown or to be grown on sheep in Ireland during the season of 1918, for shipment from Ireland.

7. No person shall, without a permit issued by or on behalf of the Director of Raw Materials, buy, sell or deal in daggings or clarts grown or to be grown on sheep in Great Britain, Ireland, and the Isle of Man during the season of 1918.

8. Notice is hereby given that it is the intention of the Army Council to take possession of all washed or willed locks produced from daggings or clarts grown or to be grown on sheep in Great Britain, Ireland and the Isle of Man during the season of 1918.

9. No person shall mix or wind in any fleece wool grown or to be grown on sheep in Great Britain, Ireland or the Isle of Man during the season of 1918 any brokes or fallen wool, locks, daggings or other matter whatsoever, or wind or cause to be wound the said wool otherwise than in separate fleeces and ties with wool bands or glazed string supplied by persons authorised to purchase or collect wool by or on behalf of the Director of Raw Materials.

10. Nothing in this Order shall be deemed to apply to Shetland wool.

11. For the purpose of this Order:—

The expression "fleece wool" shall mean the fleece removed entirely by shearing or clipping of sheep or lambs.

The expression "daggings" or "unwashed daggings" or "clarts" shall mean the wool naturally clotted with dung or earth.

The expression "locks" shall mean any wool except daggings which may have become detached from the fleece at the time of shearing or thereafter.

The expression "washed or willed locks" shall mean daggings, as hereinbefore defined, wherefrom the dung or earth has been extracted by washing or any other process.

The expression "brokes" shall mean short wool obtained from the edges of the fleece in clipping.

The expression "fallen wool" shall mean wool removed from the skins of sheep or lambs which have died a natural death.

The expression "gathered wool" shall mean wool left by living sheep on hedges or other places.

12. This Order may be cited as the Sale of Wool (United Kingdom) Order, 1918.

[NOTE.—Regulations made under this Order appear in the "Notes on Trade" Section.]

GOVERNMENT NOTICES AFFECTING TRADE—
continued.

INSTRUCTIONS OF COTTON CONTROL
BOARD.

RESTRICTION OF OUTPUT.

The following instructions have been issued by the Cotton Control Board, under the Cotton (Restriction of Output) Order, 1917. These instructions will come into effect on 18th March, and all previous instructions will then be revoked. In a covering letter the Board point out that on and after 18th March not more than 50 per cent. of the machinery at the mills can be worked at any time without licence from the Control Board. Spinners having both mule and ring spindles are reminded that in calculating the percentage which they may run one ring spindle must be reckoned as equivalent to one and a half mule spindles.

1. Subject to the provisions of paragraph 6 hereof on and after the 18th March, 1918, no person shall work or allow to be worked in any cotton or cotton waste mill occupied by him, more than 50 per cent. of the total number of mule and/or ring spindles and necessary preparatory machinery contained therein without licence from the Cotton Control Board.

2. Licences may be granted by the Cotton Control Board permitting spindles in excess of 50 per cent. to be worked in any mill to the extent and for such time and subject to such conditions as to payment or otherwise as may be provided for in the licence.

3. Where a mill contains both ring and mule spindles a ring spindle shall be reckoned as equivalent to one and a half mule spindles and the Board may prescribe the number of ring spindles and the number of mule spindles that may be worked therein, provided that they shall allow not less than 50 per cent. of the total mule equivalent, reckoned as aforesaid, to be worked.

4. Subject to the provisions of paragraph 6 hereof, on and after the 18th March, 1918, no person shall work or allow to be worked more than 50 per cent. of the total number of looms in any weaving shed occupied by him, without a licence from the Cotton Control Board. A loom over 72 in. reed space shall be reckoned as two looms.

5. Licences may be granted by the Cotton Control Board permitting looms in excess of 50 per cent. to be worked to the extent and for such time and subject to such conditions as to payment or otherwise as may be provided for in the licence.

6. Where two or more mills or two or more weaving sheds are occupied by the same person the Cotton Control Board may direct the number of spindles or looms that may be worked in each separate mill or weaving shed occupied by the same person so that the total number of spindles worked by any one person without a licence shall not exceed 50 per cent. of the total mule equivalent contained in his mills, and so that the total number of looms worked by any one person without a licence shall not exceed 50 per cent. of the total number of looms contained in his weaving sheds.

7. All applications for licences shall be made upon a form to be obtained from the Cotton Control Board, and must reach the Board not later than the Wednesday morning in the week preceding the week during which the licence is to commence.

8. No person shall make any false statement or representation for the purpose of obtaining a licence.

9. The expression "person" includes a firm or other association of persons, and a company.

The expression "mill" includes any place where yarn or waste is spun.

The expression "weaving shed" includes any place where looms are worked.

CONDITIONS FOR ISSUE OF LICENCES.

The conditions on which licences will be granted by the Control Board to work more than 50 per cent. of machinery are given below:

SPINDLES.

In the case of spindles engaged solely (i.e. not mixed with other types of cotton) on Egyptian cotton, or Sea Island cotton, or cotton waste, or Surat cotton, or long stapled East African cotton which is valued at 400 points on or more, licences may be granted to run up to 100 per cent. if desired. When Surat cotton, or long stapled East African cotton, or cotton waste is mixed with American cotton the spindles engaged must be regarded as American and licences will not be issued to exceed 50 per cent., except in cases of Government work as provided for below. Where Egyptian or Sea Island cotton is mixed with American, special applications to run excess spindles will be considered by the Control Board.

Consideration will also be given to special applications to run excess machinery in the case of spindles engaged on low grade American cotton (i.e., valued at more than 50 points off) provided it can be shown to the satisfaction of the Board that this low grade cotton is used alone and not mixed with any cleaner grades of American cotton. Licences to exceed 50 per cent. will not be granted to

GOVERNMENT NOTICES AFFECTING TRADE—
continued.

spinners of American cotton except in cases where more than 30 per cent. of the total spindles of the mill are engaged on Government work, in which cases licences will be granted to enable an additional 20 per cent. of spindles to be run on private work. Thus, whereas the ordinary American spinner has hitherto been allowed to run up to 60 per cent. of his total spindles he will not be allowed on and after 18th March to run more than 50 per cent. In other words, he will be required to stop one-sixth of the spindles he is at present running.

A mill which has some spindles working entirely on Egyptian, or Sea Island, etc., cotton, and others on American cotton, has hitherto been treated as two separate mills for the purpose of calculating the number of spindles that may be run; so that if the full 60 per cent. (which now becomes 50 per cent.) were run on American cotton no spindles could be started on Egyptian cotton without stopping some on American. It is felt desirable, however, that to a limited extent spinners should be encouraged to run spindles on Egyptian cotton so as to reduce unemployment, and provided that the required reduction of one-sixth of the spindles at present working on American cotton is made, licences will be granted to run extra spindles on Egyptian cotton without involving a further stoppage of spindles working on American cotton.

LOOMS.

Licences will be granted to run looms up to 60 per cent. of the total in the mill but no more, except in cases of looms on waste, or looms on "Egyptian or Fine Counts" or looms on Government work. Licences will be granted to run looms on waste or looms on "Egyptian or Fine Counts" as defined below up to 100 per cent. Looms on "Egyptian or Fine Counts" are defined to include:—

(1) Looms that are weaving cloth made wholly from Egyptian yarns, both warp and weft of any counts.

NOTE.—The term "Egyptian yarns" includes yarns that are known in the trade and sold as "cream."

(2) Looms that are weaving both, 60s. warp and 60s. weft or finer or doubled yarn which is made from doubling single yarns of 60s. count, or finer, in both warp and weft.

Manufacturers who have some looms wholly on "Egyptian or Fine Counts" and others on coarser American counts, should calculate the number of looms they may run in the following way:—

They should deduct from their total looms the number of looms engaged on "Egyptian or Fine Counts," all of which they may run. Of the remainder they may run 60 per cent.

For example, if a manufacturer has 100 looms 60 of which are on the "Egyptian or Fine Counts" and 40 on coarser American counts, he may run all the 60 looms on "Egyptian or Fine Counts" plus 60 per cent. of the remaining 40 looms, i.e., 24 looms, making 84 looms in all.

In the case of cloths made from "Egyptian or Fine Counts" which contain a striped warp effect or a check effect made from coarser American yarns, or cloths the bulk of which is composed of "Egyptian or Fine Counts," but which contain also American weft of a coarser number (for instance in poplins, venetians, etc.) the Control Board are prepared to consider in individual cases whether they can regard looms engaged on such cloths or any portion of their looms as engaged on "Egyptian or Fine Counts." Applications to run extra looms in such cases should be made in writing showing particulars and make of cloth.

Licences will also be granted to run looms on the coarser American counts in excess of 60 per cent. in cases where it can be shown that more than 40 per cent. of the total looms are engaged on Government work, in which cases licences will be granted to enable an additional 20 per cent. of the total looms to be run on private work.

LEVIES.

Licences to run machinery in excess of 50 per cent. will only be issued on payment of levies on all spindles or looms worked above 50 per cent. of the total number, on the following scale:—

SPINDLES.

£d. per mule spindle per week.
£d. „ ring „ „

LOOMS.

Under 72 inches per reed space.

Up to and including 70 %		1s. 3d. per loom per week.	
Over 70 % and up to and including 75 %		1s. 6d. „ „	
75 %	80 %	1s. 9d.	„ „
80 %	85 %	2s. 0d.	„ „
85 %	90 %	2s. 3d.	„ „
90 %	95 %	2s. 6d.	„ „
95 %	100 %	2s. 9d.	„ „

The levies on looms over 72 inches reed space will be at double the above rates.

Attention is particularly called to the fact that no spinner or manufacturer is entitled to run any machinery

GOVERNMENT NOTICES AFFECTING TRADE— *continued.*

at all (no matter how small the margin may be) in excess of 50 per cent. without licence from the Control Board. In cases where American spinners desire to run a few spindles in excess of 50 per cent., in order to avoid splitting a pair of mules, application should be made to the Control Board who may grant a licence up to a limit of 0.5 per cent. in excess of the 50 per cent., but no firm is entitled to run a single spindle in excess of 50 per cent. without licence.

SHIPMENT OF FLAX LINE OR TOW YARN.

The Flax Control Board announce that an Order has been made by the Army Council under the Defence of the Realm Regulations amending the Flax Yarns (Shipment from Ireland) Order, 1918, by providing that the permit of the Flax Control Board must be obtained for shipment of flax line or tow yarns both to and from Ireland.

Applications for such permits should be made, in the case of shipment from Ireland, to the Irish Sub-Committee, 31, Wellington Place, Belfast, and in the case of shipment to Ireland, to the Scottish Sub-Committee, 10, Victoria Chambers, Dundee.

STANDARD CLOTHS.

Any firm of wholesale clothing manufacturers desirous of participating in the coming allocation of standard cloth should apply to the Director of Wool Textile Production, War Office, Bradford, for particulars. Questionnaires are being issued, and these must be returned to Bradford not later than 23rd March by the wholesale clothiers, or they will not be considered when the allocation of cloth takes place.

GENERAL SECTION.

COURTS (EMERGENCY POWERS) ORDER, 1918.

An Order in Council, dated 4th March, orders that the Courts (Emergency Powers) Act, 1914, which gives "in connection with the present War, further powers to Courts in relation to remedies for the recovery of money, and in relation to other similar matters," shall have effect subject to the following limitation:—

Sub-section (1) of Section 1 thereof shall not apply to any right or power conferred by Statute upon any dock, port, warehouse, wharf, or harbour authority, or upon any railway or canal company, warehouseman, or wharfinger, to enforce by sale a lien or charge upon or claim in respect of goods in their or his custody unless the owner of or a person interested in the goods serves on the authority, company, warehouseman, or wharfinger, within five days after notice has been given that it is intended to sell such goods, notice in writing that he objects to such sale thereof without an Order of the Court on the ground that he is unable to make any payment secured by such lien charge or claim by reason of circumstances attributable directly or indirectly to the present War; provided that when the goods are articles of food or of a perishable nature the said Sub-section shall not apply to such right or power as aforesaid whether a notice of objection has been given or not.

Where the Statute which confers such right or power as aforesaid provides for notice to be given before a sale of the goods takes place such notice shall be sufficiently given for the purpose of this Order if given in accordance with the requirements of the Statute, and in the case of goods which are not articles of food or of a perishable nature ten days at least before the sale. In other cases such authority, company, warehouseman, or wharfinger, shall in the case of goods which are not articles of food or of a perishable nature, ten days at least before the sale, give notice of their or his intention to sell the goods in their or his possession by advertisement in two local newspapers circulating in the neighbourhood, or in one daily newspaper published in London and in one local newspaper, and also, if the name of the owner of the goods has been stated in any of the documents which have come into the possession of the authority, company, warehouseman, or wharfinger, or is otherwise known to them or him, send notice of the intended sale to such owner by post to his last known address. Such advertisement need not set out a list of the goods to be sold, but shall state the dates between which such goods came into the possession of the authority, company, warehouseman, or wharfinger.

NATIONAL SALVAGE COUNCIL.

The constitution of the National Salvage Council, which was referred to in last week's issue of the "Board of Trade Journal," has now been completed. The functions of the Council are to assist, without in any way relieving existing Authorities of their present or future responsibilities, in the general public duty of the prevention of

GOVERNMENT NOTICES AFFECTING TRADE— *continued.*

waste, and in the collection, recovery, and re-utilisation of waste products, with a view to conserving national resources and reducing the tonnage required for the importation of new raw materials.

The membership of the Council is as follows:—

The Earl of Derby, K.G., etc., Secretary of State for War (Chairman); Lieutenant-Colonel J. Leigh Wood, C.M.G. (Deputy-Chairman); Lieutenant-General Sir J. S. Cowans, G.C.M.G., etc., Quartermaster-General to the Forces (War Office); Mr. Andrew Weir, Surveyor-General of Supply (War Office); Mr. J. W. H. Culling, O.B.E., and Mr. G. M. Discombe, O.B.E. (Admiralty); Mr. Alexander Walker and Mr. George Jewell (Ministry of Munitions); Lieutenant-Colonel A. G. Weigall, M.P., and Mr. A. Towle (Ministry of Food); Dr. Russell and Mr. L. Weaver, O.B.E. (Board of Agriculture); Mr. P. Ashley and Mr. S. J. Chapman (Board of Trade); Mr. I. G. Gibbon, C.B.E., and Mr. A. W. J. MacFadden, C.B. (Local Government Board); Mr. J. Lamb, C.B. (Scottish Office); and the Marquess of Salisbury, K.G., etc. (Ministry of Reconstruction). Mr. E. H. Davies and the Hon. W. B. L. Barrington have been appointed Joint Secretaries.

EXECUTIVE BOARD.

Mr. David Currie has been appointed Director-General of National Salvage and the Chairman of the Executive Board, which consists of the following:—

Lieutenant-Colonel J. Leigh Wood, C.M.G., and Major-General Lt. W. Atcherley, C.M.G., etc. (War Office); Mr. S. A. Oliver (Admiralty); Lieutenant-Colonel W. Bridges (Ministry of Munitions); Lieutenant-Colonel A. G. Weigall, M.P. (Ministry of Food and Board of Agriculture); Mr. I. G. Gibbon, C.B.E. (Local Government Board); and Mr. J. Lamb, C.B. (Scottish Office).

The Offices of the Director-General, to whom all communications should be addressed, are at Caxton House (East Block), Tothill Street, Westminster, S.W. 1.

LABOUR RESETTLEMENT COMMITTEE.

As already announced, the Minister of Labour has set up a Committee, to be known as the "Labour Resettlement Committee," to advise him on the problems arising out of the demobilisation of the Forces. The questions which will be referred to it include not only those connected with the resettlement of soldiers and sailors in civil life, but also those connected with the disbandment of munition workers, inasmuch as the restarting of industry after the war demands that these two sets of questions shall be treated on uniform lines. All schemes devised for dealing with these questions will be referred to the Committee for their consideration and advice before they are put into operation, and the Committee will be closely associated with their administration. By this means the Minister hopes to secure the co-operation of employers and trade unions with the Government, which he regards as an essential condition for success. The Committee's terms of reference are as follows:—

To advise the Ministry of Labour on the resettlement of labour consequent upon the demobilisation of the Forces and the discharge of workers owing to the cessation of work connected with the war.

The Committee consists of the following members, who have been nominated by their respective organisations:—

The Right Hon. the Minister of Labour (Chairman); the Right Hon. Lord Burnham (Vice-Chairman).

REPRESENTATIVES OF EMPLOYERS.

Sir Beville Stanier, Bart., M.P. (Central Association of Chambers of Agriculture and National Farmers' Union); Mr. W. H. Raeburn (Chambers of Shipping of the United Kingdom, the Shipping Federation, Limited, and Liverpool Steamship Owners' Association); Sir R. Turnbull, M.V.O. (Railway Executive Committee); Mr. Ernest J. Brown (National Federation of Building Trades Employers of Great Britain and Ireland); Mr. Adam Nimmo (Mining Association of Great Britain); Mr. J. J. Keliher (Federation of Master Printers, etc.); Mr. T. Garnett (Federation of Master Cotton Spinners' Association, Limited, and Cotton Spinners' and Manufacturers' Association); Mr. George H. Wood (Woolen and Worsted Trades Federation); Mr. R. H. Glanfield (Wholesale Clothing Manufacturers' Federation of Great Britain and Ireland); Mr. Owen Parker, J.P. (Incorporated Federated Associations of Boot and Shoe Manufacturers of Great Britain and Ireland); Mr. John Dewrance (Engineering Employers' Federation); Sir George Carter, K.B.E. (Shipbuilding Employers' Federation); Mr. J. J. Burton, J.P. (Central Advisory Committee for the Iron, Steel and Kindred Trades—Employers); Mr. E. Manville (Association of Chambers of Commerce of the United Kingdom); Sir Richard Vassar-Smith, Bart. (Central Association of Bankers); and Sir Herbert Austin, K.B.E. (Federation of British Industries). A representative of the Association of British Chemical Manufacturers has not yet been appointed.

GOVERNMENT NOTICES AFFECTING TRADE— *continued.*

REPRESENTATIVES OF TRADE UNIONS.

Mr. R. B. Walker (National Agricultural Labourers' and Rural Workers' Union); Mr. Robert Williams (National Transport Workers' Federation); Mr. T. Lowth (National Union of Railwaymen); Mr. J. Bradshaw (National Building Trades Council); Mr. Samuel Roebuck (Miners' Federation of Great Britain); Mr. A. L. Holmes (Printing and Kindred Trades Federation of the United Kingdom); Mr. J. Hindle, J.P. (United Textile Factory Workers' Association); Mr. Arthur Shaw (National Association of Unions in the Textile Trades); Mr. A. Conley (United Garment Workers' Trade Union); Mr. A. Hill (National Union of Boot and Shoe Operatives); Mr. Robert Young, O.B.E. (Amalgamated Society of Engineers); Mr. F. Smith (Federation of Engineering and Shipbuilding Trade Unions); Mr. Arthur Pugh (Central Advisory Committee for the Iron, Steel and Kindred Trades—Operatives); Mr. James O'Grady, J.P., M.P. (National Federation of General Workers); Mr. Alfred Short (General Federation of Trade Unions); and Mr. J. B. Williams (Parliamentary Committee of the Trade Union Congress). A representative of the National Federation of General Workers has not yet been appointed.

REPRESENTATIVES OF WOMEN.

Mrs. Fawcett, Mrs. Tennant and Mrs. Staddon.

REPRESENTATIVES OF GOVERNMENT DEPARTMENTS.

Sir David Shackleton, K.C.B., Mr. H. B. Butler, and Miss Durham, O.B.E. (Ministry of Labour); Sir Reginald Brade, K.C.B., Lieut.-General Sir C. F. N. Maeready, K.C.B., K.C.M.G., and Brigadier-General B. F. Burnett-Fitchcock, C.B., D.S.O. (War Office); Captain T. P. H. Beamish, C.B., R.N. (Admiralty); Mr. A. V. Symonds, C.B. (Local Government Board); Rt. Hon. Sir Matthew Nathan, G.C.M.G. (Ministry of Pensions); Mr. H. Wolfe, C.B.E. (Ministry of Munitions); Mr. C. Delisle Burns (Ministry of Reconstruction); and Mr. T. W. Phillips.

The Secretary of the Committee is Mr. W. Windham, C.B.E., and the Assistant Secretary, Mr. H. C. Marks. Mr. C. A. Russell, K.C., has kindly consented to act as honorary legal adviser to the Committee. Communications for the Committee should be addressed to the Secretary, Labour Resettlement Committee, Montague House, Whitehall, London, S.W. 1.

DOMESTIC SHEEP SKINS ORDER, 1918.

The Army Council have made an Order, entitled as above, and dated 6th March, ordering all persons engaged in the purchase, sale or manufacture of sheep and lamb skins taken from sheep or lambs killed in Great Britain, including slink lambs and morts, or any article wholly or partly manufactured therefrom, to comply with the following regulations:—

1. Save as hereinafter specifically excepted no fellmonger shall, without a permit issued by or on behalf of the Director of Raw Materials, hold any skins of the description aforesaid (other than those from slink lambs) for a period exceeding three weeks after the receipt by him of the woolled skins, but all fellmongers shall deliver such skins as aforesaid duly fellmongered to a tanner or dresser within the said period.

Provided that no person shall after the fifteenth day of March, 1918, without a permit issued by or on behalf of the Director of Raw Materials, fellmonger, sell, or deliver any shearing skins taken from cross-bred or down skins which would when fellmongered produce an extra pelt, but shall salt them immediately on receipt thereof and keep them for inspection by a person authorised by the Director of Raw Materials. Such skins shall be re-salted within seven days of the receipt thereof, and if they have not been inspected within fourteen days of such receipt application shall be made to the Director of Raw Materials for permission to fellmonger them.

2. All fellmongers and/or tanners shall grade all pelts of the descriptions aforesaid on the same principles and according to the same standards of assortment as those generally prevailing in the trade prior to the 9th day of April, 1917, and no fellmonger shall, without a permit issued by or on behalf of the Director of Raw Materials, deliver any pelts of the descriptions aforesaid otherwise than to such persons as he supplied therewith prior to the first day of January, 1916, and in such proportion as the said supply was delivered.

The classification shall be as follows:—

- (a) Sheep pelts:—
 (1) English:—Extras, first, seconds, thirds.
 (2) Scotch:—Primes, light primes, seconds.
- (b) Lamb pelts:—
 (1) English:—Supers, firsts, seconds.
 (2) Scotch:—Primes, seconds.

GOVERNMENT NOTICES AFFECTING TRADE— *continued.*

All sheep and lamb pelts in fellmongers' and/or tanners' yards to be subject to classification by the Department's inspectors and the determination of the Director of Raw Materials as to classification to be final.

3. No tanner or dresser of sheepskins of the descriptions aforesaid shall, without a permit issued by or on behalf of the Director of Raw Materials, tan or dress any such skins, pelts or basins otherwise than for the production of leather for the purposes of a Government contract or order or for such other purposes as may be approved by or on behalf of the Director of Raw Materials.

4. No splitter, tanner or dresser shall, without a permit issued by or on behalf of the Director of Raw Materials, sell any pelts of the descriptions aforesaid in the salted, limed or pickled state.

5. The Order made by the Army Council under the Defence of the Realm Regulations relating to pelts of the descriptions aforesaid, and dated the 13th day of June, 1917, is hereby cancelled.

OFFICERS' BADGES ORDER, 1918.

The Army Council have issued an Order entitled as above, and dated 1st March, of which the following are the main Clauses:—

1. No person shall manufacture or cause to be manufactured any bronze metal cap or collar badges for Officers' Service dress otherwise than in such manner as to conform to the War Office sealed patterns in the case of each badge, respectively.

2. No person shall sell any badges of the description aforesaid, having been wholly or partly manufactured by the vendor, at any price other than 2s. per badge, provided that upon any such sale as aforesaid the vendor shall allow to the purchaser a discount of 20 per cent. and of 2½ per cent. for cash within thirty days if the badges are purchased for the purpose of re-sale by the purchaser.

3. No person shall sell any badges of the description aforesaid, not having been manufactured by the vendor, at any price other than 2s. per badge, provided that upon any such sale as aforesaid, the vendor shall allow to the purchaser a discount of 10 per cent. and of 2½ per cent. for cash within thirty days if the badges are purchased for the purpose of re-sale by the purchaser.

4. Nothing in Clauses 1, 2, or 3 hereof shall be deemed to refer to any badge whereof any part is in gilt or silver, or to any badges required for any unit of His Majesty's Indian Army or Oversea Contingents.

5. No person shall sell any badge of the description indicated in Clause 4 hereof for the use of the purchaser at a price exceeding the cost thereof to the vendor by more than 25 per cent.

6. No person shall sell any badges of the description aforesaid for use by the purchaser unless the purchaser is duly authorised to wear the said badges.

TRANSPORT ARBITRATION BOARD.

The Offices of the Transport Arbitration Board have been transferred from the Patent Office, Chancery Lane, London, W.C. 2, to the Offices of the Defence of the Realm Losses Commission, Spence House, St. James's Place, London, S.W. 1.

FOREIGN HOLDINGS (RETURNS) ORDER.

The Food Controller has issued an Order requiring returns to be made by all persons who have in their possession, custody or control within the United Kingdom any article or any warehouse warrant or other document of title in respect of any article mentioned in the Schedule to the Order which is held on foreign account.

For the purpose of the Order, an article or document is deemed to be held on foreign account:—

- (i) If by the terms of any sale or agreement or otherwise the article is to be delivered or is intended to be delivered to any place outside the United Kingdom; or
 (ii) If the article has been sold to or has been agreed to be sold to or is held on account of any person or firm resident or carrying on business outside the United Kingdom.

GOVERNMENT NOTICES AFFECTING TRADE—
continued.

The Schedule includes—Articles of food and the raw materials from which such articles are made, cattle feeding stuffs, live stock, condiments (excluding salt), casein, starch, farina, alcoholic beverages, tea, coffee, cocoa, chocolate, cocoa preparations, syrups and juices. It also includes sausage and other casings, and sacks, bags (other than paper bags), casks, barrels, and baskets capable of being used for carrying any agricultural produce or any of the scheduled articles.

The Order does not apply to any article or document in respect of which a return has been made to the Public Trustee under the Trading With the Enemy Amendment Act, 1914, or to the Ministry of Food under the Seeds, Nuts and Kernels and Oils and Fats (Requisition) Orders, 1917, the Raw Coffee (Returns) Order, 1917, or the Raw Cocoa (Returns) Order, 1918. Nor are returns required in respect of articles destined for His Majesty's Forces, or the Forces of His Allies or for any recognised Red Cross Society or individual members thereof, or any article in respect of which a licence for export has been granted by lawful authority.

The returns must be made before the 16th March on forms to be obtained from, and when completed to be returned to, the Secretary, Ministry of Food (Statistical Branch), Palace Chambers, London, S.W. 1. The Ministry does not undertake to supply forms except on application, and no one will be excused from making a return on the ground that he has not seen the Order or received a form.

Returns of future foreign holdings are required to be made within ten days after the date when the articles or documents come into the possession of the holder.

BISMUTH ORDER, 1918.

BISMUTH ORES, BISMUTH METAL AND PRODUCTS THEREFROM.

1. The Minister of Munitions has made an Order, dated 12th March, ordering that the war material to which Defence of the Realm Regulation 30A applies shall include war material of the following classes and descriptions, namely:—

All bismuth-bearing ores and bismuth metal, and alloys and salts derived or produced therefrom.

2. In exercise of the powers conferred on him by the Defence of the Realm Regulations and all other powers thereunto enabling him, the Minister of Munitions hereby orders as follows:—

(1) Every person holding any stock of any of the material specified in Clause 1 of this Order shall within fourteen days from the date hereof furnish full particulars of any such stock to the Controller of Non-Ferrous Materials Supply, Ministry of Munitions, 8, Northumberland Avenue, London, W.C. 2 (hereinafter referred to as the Controller).

(2) Every owner, lessee or licensee of a mine or mines producing bismuth-bearing ores situate in the United Kingdom shall, within fourteen days from the date hereof and once in every month thereafter, make to the Controller, on and in accordance with the form prescribed by the Controller, a return showing particulars of his monthly output and deliveries of bismuth ore, concentrates and stocks on hand at the end of each month.

(3) Every merchant, importer or broker who receives consignments from outside the United Kingdom of bismuth ores shall, within fourteen days from the date hereof and once in every month thereafter, make to the Controller on and in accordance with the form prescribed by the Controller, a return showing all shipments afloat and all parcels landed or in warehouse during the month preceding the day of the return.

(4) Every person who treats any ore to which this Order applies or manufactures any material or article therefrom shall, within fourteen days from the date hereof and once in every month thereafter, make to the Controller on and in accordance with the form prescribed by the Controller, a return showing stock in hand, receipts and consumption of such ore and stock in hand, output, and deliveries of manufactures from such ore.

(5) Every person who in any manufacture uses Bismuth metal or any alloy thereof shall, on the 1st day of April, 1918, and thereafter on the first day of every calendar month, make to the Controller a return on and in accordance with the form prescribed by the Controller, showing the quantity of bismuth metal or any alloy thereof received by him from the producer, the quantity consumed by him in such

GOVERNMENT NOTICES AFFECTING TRADE—
continued.

manufacture during the preceding month, and the stock in hand at the end of the said month.

(6) Notwithstanding the above, no return is required from any person whose total stock in hand and not intended to be used in connection with the manufacture or alloy of steel or other metal has not during the period for which a return would but for this exception have been required exceeded in the case of

Bismuth salts 56 lb.
Bismuth metal or alloy thereof ... 14 lb.

3. Every return made by any person for the purpose of this Order shall be signed by such person, or, if the return is made on behalf of a firm or company, shall be signed by a partner, director, manager or other responsible official, and every statement contained therein shall be true and accurate.

4. Applications for permits under this Order should be made to the Controller of Non-Ferrous Materials Supply, M.S./P., Ministry of Munitions, 8, Northumberland Avenue, W.C. 2.

5. This Order may be cited as the Bismuth Order, 1918.

NOTICE

OF GENERAL PERMIT UNDER THE ABOVE ORDER.

The Minister of Munitions gives notice that he hereby until further notice permits any person to purchase Bismuth metal and Bismuth salts not exceeding in any one calendar month in the case of Bismuth metal a total quantity of 10 lb. and in the case of Bismuth salts a total quantity of 56 lb., provided that the same are purchased and in fact used for pharmaceutical or medical purposes only, and further permits a sale to any person purchasing as hereinbefore authorised.

SHELLAC (CONTROL) ORDER, 1918.

The Minister of Munitions, in exercise of the powers conferred upon him by the Defence of the Realm Regulations and all other powers thereunto enabling him, hereby orders as follows:—

1. Every person holding or having under his control, whether in stock or transit, any shellac as hereinafter defined, shall within seven days of the date hereof (namely, 12th March) furnish a return to the Controller, Non-Ferrous Materials Supply M.S./L., at the address under-mentioned, containing full particulars of such Shellac, the respective grades thereof, the purposes for which the same is intended, and the average monthly consumption of Shellac by such person for any purpose during the year 1917; provided that no such return is required from any person unless he has at some time since 1st January, 1917, had in his possession or under his control an amount of Shellac exceeding an aggregate of 7½ cwt. net weight.

2. No person shall as from the date hereof until further notice purchase or, except for the purpose of carrying out a contract in writing existing prior to such date for the purchase of shellac, take delivery of any shellac whether situate in or outside the United Kingdom, except under and in accordance with the terms of a licence issued under the authority of the Minister of Munitions, or sell, or, except for the purpose of carrying out a contract in writing for the sale of shellac existing at the date thereof, deliver any such shellac to any person other than the holder of such a licence and in accordance with the terms thereof, provided that no such licence shall be required by any person for the purchase of shellac in quantities not exceeding an aggregate of 7½ cwt. net weight during any one calendar month or for the sale or delivery of such maximum quantity on any such purchase.

3. The expression "Shellac" shall for the purpose of this Order mean:—

Shellac,
Stick Lac,
Seed Lac,
Garnet Lac,
and Button Lac,

or any of them.

4. This Order may be cited as "The Shellac Control Order, 1918."

5. All applications for licences shall be addressed to The Controller, Non-Ferrous Materials Supply, M.S./L., Ministry of Munitions, 8, Northumberland Avenue, London, W.C. 2.

Customs Regulations and Tariff Changes.

BRITISH INDIA.

EXPORTATION OF RICE PROHIBITED.

The official "Indian Trade Journal" of the 18th January contains copy of a Notification (No. 439 D) dated the 12th January, 1918, prohibiting the export of rice from British India to all destinations.

CANADA.

APPOINTMENT OF WAR TRADE BOARD.

See under "Canada" in Imperial and Foreign Trade Section.

MALTA.

REVISED TARIFF.

The Board of Trade have received copy of the Import Duties (Amendment) Ordinance, 1918 (No. 6 of 1918), dated 26th January, 1918, which contains the Schedules of Import Duties now in operation in the Colony. The previous Schedules of Import Duties contained in Ordinance No. 3 of 1917 are repealed by the present Ordinance. The Schedule of Specific Duties is amended by the imposition of increased duties on tobacco and certain classes of wines. A duty of 5 per cent. *ad valorem* on all unenumerated goods was introduced by Ordinance No. 3 of 1917 above referred to. This duty is now increased in the case of several classes of goods to 10 per cent. *ad valorem*, the 5 per cent. *ad valorem* duty in the other cases being continued by the present Ordinance.

The complete Schedules of the tariff now in operation under Ordinance No. 6 of 1918 are as follows:—

FIRST SCHEDULE.

TABLE OF SPECIFIC DUTIES.

Article.	Rate of Import Duty.
Beer—	£ s. d.
Containing more than one per centum of proof spirit per Imperial gallon	0 0 4½
Containing not more than one per centum of proof spirit per Imperial gallon	0 0 1
Bullocks and other animals of the kind ... per cantar, or fraction not less than 1 lb. in proportion	0 4 0
Grains—	
Wheat per salm	0 10 0
Wheat if damaged so as to be unfit for the food of man (commonly called <i>frumentazzo</i>)	
... .. per salm	0 2 0
Grains manufactured—including all kinds of manufactured grain or preparations containing manufactured grain per cantar	0 6 0
Grain, manufactured—if damaged so as to be unfit for the food of man per cantar	0 2 0
Horses per head	1 0 0
Malt per cantar	0 5 0
Meat (all kinds), fresh, frozen or preserved, other than meat preserved by salt only ... per cantar	0 10 0
Mules per head	1 0 0
Oils, edible—with the exception of oils used as medicine, and of linseed oil and other oils intended for industrial purposes, being unfit for the food of man per caffiso	0 0 6
Petroleum and petrol spirit per Imperial gallon	0 0 1
Potatoes per cantar	0 0 10
Pulse—(kidney beans, lentils, peas and flour of pulse) per salm	0 2 0
Saccharin—including mixtures containing saccharin and substances of a like nature or use	
... .. per ounce	0 1 3
Sheep and swine per cantar	0 4 0
Spirits or strong waters of any strength not exceeding the strength of proof by Sykes' hydrometer (London proof) and so in proportion for any strength greater than that of the said proof	
... .. per Imperial gallon	0 5 0
Spirits—methylated per gallon	0 1 0
Sugar—refined per rotolo	0 0 0½
"—raw "	0 0 0½

CUSTOMS REGULATIONS AND TARIFF CHANGES—continued.

TABLE OF SPECIFIC DUTIES—continued.

Article.	Rate of Import Duty.
Tobacco—	£ s. d.
Cigars (not including wrappers) ... per rotolo	0 5 0
Cigarettes (" ") ... " "	0 4 0
Clavendish or negro head ... " "	0 3 0
Other manufactured tobacco... " "	0 3 0
Snuff ... " "	0 3 0
Unmanufactured tobacco, except ordinary leaf tobacco imported for the local manufacture of common cigars per rotolo	0 2 0
Ordinary leaf tobacco, unmanufactured, imported for the local manufacture of common cigars	
... .. per rotolo	0 1 3
Varnish containing spirits ... per Imperial gallon	0 1 0
Vinegar per Maltese barrel	0 2 0
Wine imported in casks not exceeding 12·2 per cent. of alcohol in 100 parts of dutiable liquid at 62 deg. F.	
... .. per Maltese barrel	0 3 0
" 13·2 " " "	0 4 0
" 14·2 " " "	0 5 0
" 15·2 " " "	0 6 0
" 16·2 " " "	0 7 11
" 17·2 " " "	0 12 10
" 18·2 " " "	0 17 10
" 19·2 " " "	1 2 9
" 20·2 " " "	1 7 8
" 21·2 " " "	1 12 8
" 22·2 " " "	1 17 7
" 23·2 " " "	2 2 6
Exceeding 23·2 " " "	2 7 6
Wine imported in bottles shall pay an additional duty, viz.:—	
Sparkling per Maltese barrel	1 8 6
Still "	0 9 6

SECOND SCHEDULE.

TABLE OF EXEMPTIONS.

The following shall be the exemption list:—

Food and Drink.

- Butter and butter substitutes.
- Cheese.
- Cocoa.
- Coffee and coffee substitutes, including chicory.
- Eggs.
- Fish, fresh, eured, dried or preserved by salt only.
- Food and drink for the use of Mendicant Religious Orders.
- Fruit (fresh or dried).
- Grains:—
 - Barley.
 - Indian corn.
 - Inferior grains.
 - Saggina.
- Lard.
- Milk, fresh or preserved.
- Pulse:—
 - Beans.
 - Caravanees.
 - Chick peas.
 - Lupins.
 - Vetches.
 - Unenumerated.
- Rice.
- Seeds:—
 - Carob beans.
 - Cotton seed.
 - Unenumerated.
- Tea.
- Tomato sauce and extracts.
- Vegetables, fresh.

Raw materials and Articles mainly unmanufactured.

- Charcoal.
- Coal, coke and patent fuel.
- Firewood.
- Hides and skins.
- Manure.
- Marble and stone.
- Sponges.
- Wood and timber.
- Such other articles unenumerated as the Governor shall declare to be absolutely or conditionally exempt from duty by regulation published in the Government Gazette.

Manufactured Articles.

- Agricultural machines and implements.
- Books, printed, bound or unbound, pamphlets, magazines, newspapers, and atlases.
- Cement.

CUSTOMS REGULATIONS AND TARIFF CHANGES—*continued.*

TABLE OF EXEMPTIONS—*continued.*

Cinematographic films.
 Indigo and other colouring substitutes for dyeing yarns for use in weaving.
 Instruments, scientific and surgical (including spectacles except when the mountings are wholly or partly of gold or silver).
 Leather.
 Machinery for industrial purposes and parts thereof.
 Paper, wrapping and printing.
 Postage stamps, used or unused.
 Samples of no commercial value and articles of *réclame* which are usually distributed *gratis* to customers, provided the Collector of Customs is satisfied that they are really imported for that object.
 Soap (laundry).
 Sulphate of copper for the treatment of vines and of other trees and plants.
 Sulphur powder for the spraying of vines.
 Tin, iron, copper, zinc and lead in block and sheets.
 Twines for industrial purposes.
 Yarns for lace-making and for weaving.

Miscellaneous and unclassified Articles.
 Any dutiable article imported by the Civil Government, Naval or Military Establishments for the public service.
 Articles of civil, naval and military uniforms imported by members of these services for their personal use.
 Bran, containing not more than 5 per cent. of flour.
 Bullion and specie.
 Household effects, *i.e.*, articles of furniture which have been in use by a passenger or his family, who is removing his household from another place.
 Passengers' baggage, including wearing apparel and personal effects, used, as the Collector of Customs in his discretion considers to be intended for the importers' personal use, provided always that duty shall not be charged on any spirits not exceeding half a pint, or on any cigars or cigarettes not exceeding $\frac{3}{4}$ lb. of each, or any tobacco not exceeding one $\frac{1}{4}$ lb. in weight, included in a passenger's baggage.

THIRD SCHEDULE.

TABLE OF "AD VALOREM" DUTIES.

Ten per cent. ad valorem.

An *ad valorem* duty of 10 per centum or £10 upon every £100 of their actual cost shall be levied on the following articles:—

Arms and ammunition.
 Bicycles and parts thereof.
 Chocolates.
 Confectionery.
 Electrical goods.
 Fancy goods; *i.e.*, articles used for ornamental purposes or partly for use and partly for ornament.
 Furniture and cabinetware.
 Gold, silver and plated goods.
 Jewellery and precious stones.
 Lace.

Five per cent. ad valorem.

An *ad valorem* duty of 5 per centum or £5 upon every £100 of their actual cost shall be levied on the following articles:—

Acids and alkalis.
 Albums.
 Animals, live, unenumerated.
 Boots and shoes.
 Brushware.
 Candles.
 Chemicals and apothecaries' wares unless containing alcohol.
 Clocks and watches other than gold and silver ones.
 Cordages.
 Cutlery and ironmongery.
 Drugs.
 Earthenware and chinaware.
 Fowls and poultry.
 Fish, preserved.
 Fruit, preserved.
 Game (dead).
 Glass and glassware.
 Haberdashery.
 Hardware.
 Hats and caps.
 India-rubber and manufactures thereof.
 Instruments, musical.
 Iron and steel manufactures.
 Jams and sugar preserves.
 Leather manufactures.
 Matches.

CUSTOMS REGULATIONS AND TARIFF CHANGES—*continued.*

TABLE OF "AD VALOREM" DUTIES—*continued.*

Millinery.
 Mineral waters.
 Motor vehicles, including motor-cycles, and parts thereof.
 Oils, unenumerated.
 Oilcloth and floorcloth.
 Paints and colours.
 Photographic goods.
 Pickles, sauces and condiments (except tomato sauce and extracts of tomatoes).
 Soap (except laundry).
 Stationery, including account books, diaries and similar matter usually classed as stationery.
 Textiles:—
 Apparel and slops.
 Bags and sacks (empty).
 Carpets and carpeting.
 Cotton goods.
 Hosiery and drapery.
 Linen goods.
 Silk goods.
 Woollen goods.
 Unenumerated.
 Vegetables, preserved.
 Wax.
 Other goods unenumerated not appearing in the Second Schedule.

GILBERT AND ELLICE ISLANDS PROTECTORATE.

AMENDMENT OF IMPORT TARIFF.

The Board of Trade are in receipt, through the Colonial Office, of copy of a Proclamation (No. 22 of 1917), which amends the Import Duties Tariff in operation in the Protectorate by deleting the item "European clothing 12½ per cent. *ad valorem*," and substituting the following item:—

"All dress materials, prints, and articles of clothing, and all materials imported for the manufacture of, or for use as, clothing, 12½ per cent. *ad valorem*."

NEW ZEALAND.

PROHIBITED IMPORTATION OF REMEDIES FOR DRINK AND DRUG HABITS.

The Board of Trade have received copy of an Order-in-Council which prohibits the importation into New Zealand of the following goods:—

The Keeley Cure for Opium Habit, Drunkenness, Neurasthenia, Tobacco Habit;
 Wood's Treatment for Alcohol, Drug, and Tobacco Habits;
 Drink Habit Cure (Neale Institute Co., Des Moines, Iowa, U.S.A.);
 Dipsosava;
 Dipsocurc;
 Antidipso;

Any preparation purporting to be a remedy for drunkenness, Alcoholic Habit, Opium Habit, Tobacco Habit, Cocaine Habit, or other drug habits;
 Printed or written advertising matter relating solely or principally to any of the preparations enumerated above.

NIGERIA.

GROUND NUTS EXPORT DUTY: METHOD OF COLLECTION.

The Supplement to the "Nigeria Gazette" of 17th January contains copy of Regulations No. 3 of 1918, specifying the method of collection of the duty of 10s. per ton on ground nuts exported from the Colony. The Regulations state that in the case of shipments from Burutu and other ports, exporters shall arrange for shipments of ground nuts in bags to be standardised at 27 bags to 2 tons, and duty may be assessed accordingly, provided that the Collector, if he has cause to think that the weights are incorrect, may cause any portion of the consignment to be weighed.

**CUSTOMS REGULATIONS AND TARIFF
CHANGES—continued.**

ARGENTINE REPUBLIC.

EXPORT DUTIES FOR MARCH.

With reference to recent notices in the "Board of Trade Journal" on the subject of the Argentine export duties, the Board of Trade are in receipt, through the Foreign Office, of copy of a telegram from H.M. Minister at Buenos Aires reporting that revised official valuations have been fixed for a number of commodities for the purpose of assessing export duty thereon as from the 1st March.

It will be remembered that, in accordance with the Argentine Law on the subject, the export duty is a certain percentage on the amount by which the official valuations (which are fixed monthly) exceed the "basic prices" of the goods. If the valuation fixed does not exceed the "basic price," it follows that no export duty is leviable so long as the valuation remains in force.

The following statement shows, in respect of each article mentioned in the telegram from Sir R. Tower, the "basic price," the new valuation for the month of March, and the resulting export duty. As regards the "basic prices," it may be mentioned that certain errors in the Schedule given at p. 110 of the "Board of Trade Journal" for the 24th January are here rectified.

Article.	"Basic Price."	Valuation (March).	Export Duty.	
	Pesos cts. (gold). <i>Each.</i>	Pesos cts. (gold). <i>Each.</i>	Pesos cts. (gold). <i>Each.</i>	Pesos cts. (gold). <i>Each.</i>
Cattle	45 99	42 16	Nil.	
Horses and mules... ..	58 25	61 22	0 89-55	
	<i>Per 1,000 kilogs.</i>	<i>Per 1,000 kilogs.</i>	<i>Per 1,000 kilogs.</i>	<i>Per 1,000 kilogs.</i>
Bran and pollards	23 71	13 66	Nil.	
Frozen and chilled beef	223 30	247 00	3 55-5	
" mutton	185 90	239 60	8 05-5	
Dried cattle hides... ..	657 37	668 25	1 63-2	
Salted cattle hides	382 79	494 74	16 79-25	
Preserved meat	314 60	182 00	12 56-2	
Wheat flour	76 69	86 28	0 57-5	
Quebracho logs	15 51	16 50	0 14-85	
" extract	75 00	105 62	4 59-3	
Tallow and melted fat	166 98	315 00	22 20-3	
Unwashed sheepskins	336 00	753 50	62 62-5	
Frozen offal	132 00	254 00	18 90	
Barley	28 68	36 02	0 88-08	
Raw wool from Entre Rios and Corrientes	600 60	1,441 41	126 12-6	
" from Buenos Aires, Santa Cruz and Tierra del Fuego	462 00	1,108 80	97 02	
" from Santa Fé, Cordoba, Pampa, Rio Negro and Chubut	369 60	887 01	77 61-6	
" from Mendoza, San Luis, and other regions	277 20	665 28	58 21-2	
Dried blood	55 00	86 37	4 70-55	
Oilseed cake	26 10	36 00	1 15-2	
Shorn sheep skins... ..	167 00	375 00	31 20	
Frozen pork	155 65	247 00	13 70-25	
Salt pork	220 70	352 00	19 69-5	
Oats, in bags		38 78	1 13-5	
" in bulk		30 80	0 43	
Maize, in bags		31 32	0 44-3	
" in bulk		23 37	Nil	
Linseed, in bags		84 59	2 62-6	
" in bulk		76 95	1 97	
Wheat, in bags		62 48	1 08-8	
" in bulk		55 00	1 38-4	
	<i>Per kilog.</i>	<i>Per kilog.</i>	<i>Per kilog.</i>	<i>Per kilog.</i>
Jerked meat	0 25-55	0 31-6	0 00-9	
Butter	0 71-2	0 84-3	0 01-95	
Margarine and palmitine..	0 18	0 31	0 02-4	
Washed wool	1 10	1 94	0 12-6	

LAW MODIFYING THE TARIFF.

With reference to the notice at pp. 306-307 of the "Board of Trade Journal" for the 8th November last, respecting a Bill making provision for certain modifications of the Argentine Tariff Law (No. 4933) and of the Argentine Customs Regulations, H.M. Minister at Buenos Aires (Sir R. Tower) reports, in a telegram dated 2nd March, that the Bill in question has been enacted and promulgated as Law, with a number of amendments.

With reference to Article 2 of the Bill, Sir R. Tower reports that harvesters and strippers, with or without

* "Oats," 29-32 pesos; "maize," 27-63 pesos; "linseed," 62-71 pesos; "wheat," 45-08 pesos; are the "basic prices" specified in the Export Duty Law.

**CUSTOMS REGULATIONS AND TARIFF
CHANGES—continued.**

motor, huskers and shellers with or without motor, and spare parts of such machines, are added to the list of goods which are exempted from the duty of 5 per cent. *ad valorem* provided for by that Article.

Sackcloth and sackcloth bags, twine for the same, twine for harvesting machines, and paper for newspapers of the kind comprised in No. 2595 of the Valuation Tariff, are to be free of all Customs duties (Article 3).

Article 4 of the Bill, relating to the surtax on goods which are subject, under the Tariff Law, to a duty of 10 per cent. or more is incorporated in the measure as enacted.

The following articles are to pay a duty of 5 per cent. on their valuations:—Rice; cotton and common woollen thread for embroidering; needles for sewing and embroidering; sulphate of copper for treating seeds; oxide of zinc, oxide of iron, and sulphate of baryta for making paints. The Tariff duty on galvanised iron, and on sewing and washing machines is fixed at 10 per cent.; that on carpets, and on fabrics of pure silk or silk mixed with 15 per cent. of some other textile, at 40 per cent. The specific duty on tea is reduced from 20 to 10 centavos (gold) per kilogramme.

It is understood that there are other modifications of the original Bill. Full particulars of the Law will be published in the "Board of Trade Journal" as soon as the text thereof is received from Sir R. Tower.

BRAZIL.

**RENEWAL OF CUSTOMS PREFERENCE TO
CERTAIN UNITED STATES GOODS.**

The Brazilian "Diario Oficial" for the 12th January contains a Presidential Decree (No. 12,812), dated the 9th January, which, in virtue of the authorisation contained in the Budget Law for 1918, provides for the maintenance in force during the current year of the preferential Customs treatment accorded to certain articles of United States origin on importation into Brazil. The preferential treatment consists of a reduction of 30 per cent. of the Brazilian import duties in favour of wheat flour of United States origin, and a reduction of 20 per cent. in respect of certain other articles produced in the United States, namely, those specified in the notice on p. 572 of the "Board of Trade Journal" for the 22nd February, 1917.

**DUTY-FREE ADMISSION OF FRESH
FRUITS FROM THE ARGENTINE.**

The same issue of the "Diario" contains a further Decree (No. 12,810) which, in virtue of the authorisation contained in the Budget Law for 1918, continues in force during the current year the exemption from Customs duty accorded in favour of fresh fruits from the Argentine Republic.

FRANCE.

**EXPORT OF PHOTOGRAPHIC PLATES
AND PAPERS.**

It is notified in the "Annales des Douanes" for the 1st March that, by way of exception to the prohibition of the exportation of photographic plates and papers from France, a general licence has been granted for the exportation of the undermentioned goods to all Allied or neutral countries, except Switzerland:—

Photographic plates, negative, sizes 18/24 and below; plates, positive, of all sizes; plates, radiographic, of all sizes; plates for colour photography; citrate of silver papers of all sizes; and postcards and cards, of all sizes, sensitized with citrate or bromide of silver.

**INTERNAL TAX ON PRODUCTS FOR
MAKING ARTIFICIAL MINERAL WATERS.**

Article 15 of the French Law of the 30th December, 1916, instituting a tax on mineral waters, provided that powders, salts, tablets, and, in general, all products advertised as destined for the preparation of artificial mineral waters were to be subject to an internal tax of 2 centimes per dose indicated for the manufacture of one litre of such waters.

This provision has been modified by Article 29 of a Law dated the 31st December, 1917, by which the products in question are removed, for fiscal purposes, from the category of mineral waters, and are assimilated to pharmaceutical specialities. They are no longer, therefore, dutiable at the special rate of 2 centimes per dose, but are to pay the tax established by Article 15 of the Law of the 30th December, 1916, for pharmaceutical specialities, based on their retail selling price. (See pages 76-77 of the "Board of Trade Journal" for the 12th April, 1917.)

CUSTOMS REGULATIONS AND TARIFF CHANGES—continued.

FRANCE AND ALGERIA.

IMPORT RESTRICTIONS.

IMPORT LICENCES FOR CERTAIN ARTICLES TO BE ISSUED IN LONDON.

The French Customs Office in London have notified to the Board of Trade a decision of the French Ministry of Commerce, under which certain articles of foreign or Colonial origin, which have been subjected to working in this country, are to be regarded for the purpose of the French import prohibition regulations, as of United Kingdom origin, so that import licences for such goods are now to be obtained by exporters in this country from the French Customs Office in London (Bank Buildings, Kingsway, W.C. 2). The goods affected by the decision are as follows:—

Reclaimed rubber manufactured in the United Kingdom from old rubber refined and chemically treated;

Rubber waste composed of old rubber goods manufactured in this country;

Ivory waste obtained in the manufacture of ivory goods cut in this country;

Pepper and curry powder imported in the raw state and ground and bottled in this country. (The processes of grinding and bottling, it is understood, increase the value of the goods by more than 100 per cent.).

[*Note.*—The decision noted above is by way of exception to the general French Customs regulations which determine the origin of imported goods. Although the goods specified are now to be regarded as of United Kingdom production for French import prohibition purposes, they are not so regarded for ordinary French Customs Tariff purposes, and, on importation into France, the ordinary Customs tariff rules will still be applied for the purpose of the application of the import duties, surtaxes, etc.

United Kingdom exporters, who are in doubt as to whether goods (of foreign or Colonial origin, but worked in this country) which they desire to send to France are entitled under the French regulations to be regarded as the produce of this country for the purposes of the French import restrictions, are advised to submit the case for decision to the French Customs Office in London, Bank Buildings, Kingsway, W.C. 2.]

MEXICO.

EXPORT RESTRICTIONS.

The Board of Trade are in receipt, through the Foreign Office, of translation of a Mexican Presidential Decree, dated the 25th January, in virtue of which the exportation of pigs' lard from Mexico is prohibited, and the following goods may only be exported under a permit of the Minister of Finance and subject to payment of export duty as shown below:—

Articles.	Export Duty.	
	Pesos.	cts.
Meat, fresh, dried, smoked, salted, pickled or dried	0	10
Fresh eggs	0	03
Potatoes	0	03
Fresh milk	0	03

The Decree states that, as a general rule, foreign goods legally imported into Mexico, and "nationalised" goods, may be exported without payment of duty. Nevertheless, in cases where exports of such goods would, in the opinion of the Ministry of Finance, be prejudicial to the national interests, the Minister of Finance reserves to himself the right to prohibit the export, or to fix, in case of need, the rate of export duty which such goods must pay, having regard to the nature of the goods and the duty payable, in accordance with the Export Tariff, in respect of similar goods specified in that Tariff.

The Decree came into operation on 1st February.

NORWAY.

EXPORT PROHIBITION.

CELLULOSE WADDING.

The Board of Trade are in receipt, through the Foreign Office, of telegraphic information from H.M. Minister at Christiania to the effect that the exportation of cellulose wadding from Norway has been prohibited.

CUSTOMS REGULATIONS AND TARIFF CHANGES—continued.

RUSSIA.

IMPORT AND EXPORT LICENCES.

The Board of Trade are in receipt, through the Foreign Office, of information to the effect that the "Provisional Workmen's and Peasants' Government Gazette," of Petrograd, of the 3rd/16th January, publishes a Decree of the People's Commissaries, dated the 29th December/11th January, stating that henceforth, pending the definite organisation of the International Trade Branch of the High Economic Council, export and import licences will be issued exclusively by the Foreign Trade Branch of the Commissariat of Commerce and Industry. Goods exported or imported without such licences will be considered as contraband.

The present Regulation came into force as from the 1st/14th January, and export and import licences issued after the 31st December/13th January by any institution whatever, except by that mentioned above, are to be considered null and void.

SWEDEN.

TEMPORARY SUSPENSION OF CERTAIN CUSTOMS DUTIES.

The Board of Trade are in receipt, through the Foreign Office, of telegraphic information from H.M. Minister at Stockholm to the effect that the suspension of the Customs duty on fresh, salted, or dried vegetables imported into Sweden has been prolonged until the end of June next.

The Customs duty on edible roots, fresh, without stalks (No. 102 of the Swedish Tariff) has been suspended, as from the 1st March, until the end of June, 1918.

PROHIBITION OF IMPORTATION OF ARMS AND AMMUNITION.

H.M. Minister at Stockholm also reports that a Swedish Royal Decree has been issued providing that arms and ammunition shall not be imported into Sweden except under a licence of the Handelskommission; nor shall arms and ammunition be sold in Sweden or otherwise transferred except under a licence from the Provincial Governor, to be granted after examination of the circumstances of each separate case.

The Decree came into force on the 4th March and is to remain in operation until the 1st July next.

UNITED STATES OF AMERICA.

IMPORTATION, Etc., OF CERTAIN COMMODITIES UNDER SUPERVISION OF THE TEXTILE ALLIANCE.

The Board of Trade are in receipt, through the Foreign Office, of a copy of a Bulletin (No. 23) of the Textile Alliance Inc. containing the rules and regulations, approved by the War Trade Board on the 21st January, concerning the importation, exportation, purchase and sale of the following commodities:—

Wool and animal hair and the tops, noils, yarn and waste of same, and woollen rags and crepe fibre. Sheep skins, woolled or haired; lamb skins, woolled or haired; goat skins, haired; kid skins, haired.

[*NOTE.*—As regards the joint supervision by the Textile Alliance Inc. and the Tanners' Council of the U.S.A. Inc. of skins of sheep, lambs, goats and kids, bearing wool or hair, see p. 199 of the "Board of Trade Journal" for the 14th February (Importation of Hides and Skins into the United States).]

Jute and burlap (not including wall coverings), and jute or burlap bags.

[*NOTE.*—The War Trade Board has decided that, for the purpose of these regulations, all importations of old jute material to be used as wrappers or containers, or in making or mending them, shall be subject to conditions applicable to jute, burlap and bags. Jute material suitable only for making paper, fertilisers, pads for horse collars, and other similar purposes is not subject to the provisions of these regulations. The importer's application for licence should state which of these classes is applicable to his shipment.]

Cotton and flannelette raisings. Flax.

[*NOTE.*—Importations of raw flax, hackled flax or flax line, flax tow, flax tow yarns, flax line yarns, linen thread, linen twines and linen cordage are deliverable only to the United States Government or its nominees subject to the

CUSTOMS REGULATIONS AND TARIFF CHANGES—continued.

condition that the merchandise will be used for the manufacture of material required by the United States Government.]

Linen.

[NOTE. See under "Destinations and Ports of Entry for Import Shipments," below.]

Mica.

Palm oil and palm kernel oil.

FUNCTIONS OF THE TEXTILE ALLIANCE.

The United States Government, through the War Trade Board, has requested and instructed the Textile Alliance, Inc., of New York to perform the following services in connection with the commodities named above:—

- (a) To act as consignee or endorsee of importations into the United States from all foreign countries.
- (b) To receive from intending importers and purchasers their guarantees to the War Trade Board.
- (c) To endorse bills of lading to importers upon receipt of their guarantees to the War Trade Board, or to withhold such endorsements should the War Trade Board so instruct.
- (d) To transmit to sellers and purchasers the War Trade Board's consent to their sales and purchases, whenever such consent is required, or to withhold such consent should the War Trade Board so instruct.
- (e) To keep itself informed as to the conditions in the wool, skins, jute, cotton, flax, mica and palm oil trades, and as to the members thereof, with a view to furnishing the War Trade Board at any time such information as the Board may desire.

BILLS OF LADING AND FINANCIAL ARRANGEMENTS.

All importations of the commodities covered by these regulations are to be consigned to or endorsed to the "Textile Alliance, Inc., of New York." If endorsed in this manner, the form of consignment appearing in the shipping receipt or bill of lading is immaterial.

For the convenience of all concerned, the bills of lading for shipments consigned to the Textile Alliance should contain a marginal clause reading "Notify (here show name and address of importer)." Should the interested parties find this marginal clause objectionable, it may be omitted.

All bills of lading, together with invoices and other documents, should be sent by the foreign shipper, through the regular banking, trade or commercial channels, to the actual importer (not to the Textile Alliance), by whom they should be presented to the Textile Alliance, at any of its offices in the United States. Shippers should, whenever possible, mail one signed bill of lading, one stamped Consular Invoice, and one copy of the commercial invoice on the vessel carrying the shipment. Shippers should also enter on the bill of lading the number of any export licence issued in the country of export, whenever obtainable.

On shipments consigned to or endorsed to the Textile Alliance, the Alliance can neither accept nor honour any notice of lien, nor any request that endorsement of the shipment or its delivery be withheld pending payment for the merchandise. Parties desiring payment for their goods before delivery of documents should consign their shipments either to themselves or to their bankers, to be endorsed to the Textile Alliance only after the goods have been paid for.

IMPORTERS' GUARANTEES AND ENDORSEMENT OF BILLS OF LADING.

For all import shipments consigned to or endorsed to the Textile Alliance, the bills of lading are to be presented by the importer to the Alliance, accompanied by a guarantee, forms of which (differing according to the nature of the merchandise) are annexed to the regulations.

To meet the actual expenses of the Textile Alliance in conducting its work, a charge will be made on all importations consigned to or endorsed to the Alliance, and endorsed by it to the importers. On importations released on and after the 1st February, 1918, the charge will be $\frac{1}{2}$ per cent. based upon the foreign cost at the port of departure as stated in the Consular Invoice, including all charges, but not including prepaid freight and prepaid insurance, if any.

DESTINATIONS AND PORTS OF ENTRY FOR IMPORT SHIPMENTS.

Shipments (except certain linen tissues—see the following paragraph) may be consigned to any destination in the United States via any port on any kind of bill of lading which the United States Government will accept for Customs entry, provided that shipments are not sent "in bond" to interior destinations unless such destinations are Customs ports of entry.

In the case of shipments from British territory only, of all light-weight brown linen tissues in the piece, not exceeding 5 oz. per square yard in weight, the material shall,

CUSTOMS REGULATIONS AND TARIFF CHANGES—continued.

before the bills of lading are endorsed by the Textile Alliance, be inspected by a representative of the United States Government appointed for the purpose. Delivery of such shipments will be given only in New York. The only linen tissues in which the Textile Alliance is concerned are those originating in British territory.

GUARANTEES AND REPORTS FOR SALES IN THE UNITED STATES.

The merchandise covered by these regulations (except linen tissues of the kinds specified above to which a special undertaking is applicable) is divided into Classes A and B, as enumerated in the regulations. Under the conditions applicable to Class A merchandise, the seller is required to obtain from the intending purchaser a guarantee (forms of which are annexed to the regulations), and the consent thereon of the War Trade Board, before completing the sale or delivering the merchandise. This consent is to be applied for through the Textile Alliance. As regards Class B merchandise, each seller is required to render to the purchaser, at or before the time the merchandise is despatched or delivered, a written invoice thereof, containing certain conditions to be fulfilled by the purchaser. Sellers of Class B merchandise are required to report, through the Textile Alliance, to the War Trade Board, at the end of each month, all sales of such merchandise.

GUARANTEES HERETOFORE GIVEN TO THE BRITISH GOVERNMENT.

Guarantees heretofore given to the British Government in respect to merchandise exported from British territory under British licences are not affected by the new arrangement set forth in these regulations, nor is such merchandise released from the provision of such guarantees.

MISCELLANEOUS.

Regulations are to be issued showing the conditions applicable to shipments of the articles now in question when moving from one foreign country to another via the United States, and showing also the conditions applicable to re-exports from the United States of such of these commodities as may be received from foreign countries subject to re-export restrictions.

Other provisions of the present regulations deal with merchandise damaged "in transit" or by fire; the "loan bag trade"; the records to be kept by the Textile Alliance; and the disclaiming by the Alliance of all liability in connection with the transactions covered by the regulations.

The text of the regulations, including the enumeration of goods falling under Classes A and B, respectively, and the various forms of agreement and guarantee, may be seen by British traders interested at the Department of Overseas Trade.

The Central European Powers. GERMANY.

UTILISATION OF BAVARIAN WATER POWER.

A communication to the *Norddeutsche Allgemeine Zeitung* from Munich points out that the main economic problem which will confront Bavaria after the war is the problem of industrialisation. Bavaria possesses little coal, but much water-power, which has not hitherto been utilised on a large scale. In the last years of peace Bavaria consumed on an average ten million tons of coal per annum. The coal production of the country amounts to only three millions, and seven million tons therefore have to be brought from outside the country. For this import about 700,000 truck loads are required, or in other words 100 trains of twenty trucks each per day. It is clear that the coal and transport problems would have been much easier for Bavaria during the war if Bavarian water-power had been fully utilised for the production of electrical current. The electricity consumption of Bavaria in the year 1913 was not so large as might have been expected. Bavaria to the right of the Rhine consumed only 300 million kilowatt hours, or less than one-half of the quantity required by the Imperial Nitrate Works alone. This comparison gives an idea of the present extent of the electricity demand of Bavarian industry.

Despite the war conditions, the project of the Bavarian Electrical Works, put forward by Reichsrat Oscar von

THE CENTRAL EUROPEAN POWERS—continued.

Miller some time ago, has recently entered upon a critical stage. If this project is realised, the whole of Bavaria to the right of the Rhine will be traversed by an electrical transmission net with a strength of 100,000 volts, into which the State will pour (through the projected Walchensee Works and the Lech Works to be established later on) the current to be purchased by the great Overland Works and the Bavarian towns when they require it. In the hours and seasons when the Overland Works and the towns have superfluous current at their disposal, they in their turn will pour it into the transmission net. During summer the water of the South Bavarian streams is high, and the water-power works have more current than they can themselves utilise. They will pour this superfluous current into the transmission net of the Bavarian Electrical Works, which will distribute it to works dependent upon coal.

In winter the situation will be reversed, and the works driven by coal (primarily those situated in the neighbourhood of coalfields) will have to supply the deficiency from which the hydro-electric stations suffer as a result of low water.

The correspondent learns from a well-informed quarter that this great plan is to be discussed by the Bavarian Minister of the Interior with the interested parties in the immediate future. It is proposed that the Bavarian Electrical Works should be established as a partly public and partly private undertaking with a capital of about thirty million marks, half of which will be issued in the form of shares and the other half in the form of bonds. Of the fifteen millions the Bavarian State will take over about six million marks, the larger towns altogether three million marks, and the Overland Works (which already supply a large part of Bavaria with electricity) a further three million marks. The Walchensee project, which was first put forward many years ago and will be carried out after the war, is of particular importance.

What attitude Bavaria would adopt towards a possible Imperial monopoly of electricity (as to the desirability of which the technical experts and the leading circles in the electrical industry are as yet by no means agreed) is another question. The Bavarian Minister of the Interior recently stated in the Diet that nothing was known to him at present of any intention to introduce an Imperial monopoly of electricity; but the accent appeared to lie on the words "at present." In the further course of his statement the Minister declared that Bavaria must in any case reserve the right of disposal over her own water-power, and that he intended to exploit this water-power (which he considered the greatest treasure of the country) as fully and as soon as possible.

OIL FROM FRUIT KERNELS, Etc.

A paragraph in the *Münchener Neueste Nachrichten* emphasises the importance of the systematic collection of fruit kernels in Germany for the oil supply. The oil produced from kernels by the Bavarian factories is delivered to the War Committee for Oils and Fats, and used by the Committee exclusively for the requirements of the army and the manufacture of margarine. Considerable quantities of oil are required for this latter purpose, especially as the fats now used in margarine production are for the most part of inferior quality. The supply of oil as such to the public is at present impossible save in a limited number of exceptional cases; thus the 80,000 kilograms of oil produced last year by the Bavarian Food Office from walnuts, pine-seeds, beech-nuts, etc., were not sold as oil, but used together with fine tallow for the production of margarine.

DILUTION OF TOBACCO SUPPLIES.

A communication to the *Hamburgischer Correspondent* observes that the increasing scarcity of tobacco has driven the competent authorities further in the licensing of substitutes than they originally intended to go. Thus for deliveries to the Army a mixture has been sanctioned in which there is only 15 per cent. of tobacco, while the remainder consists of dried beech leaves; and any admixture of tobacco and substitute materials in which the tobacco makes up more than 5 per cent. of the total weight is now regarded as a tobacco product. Smokers quite justifiably desire that dealers should be compelled to mark tobacco mixtures according to their composition, and that an article containing only a very small percentage of tobacco should not be allowed to be sold as a tobacco product. The tobacco industry itself is in favour of the compulsory marking of tobacco mixtures in order that consumers may be able to form a judgment as to the causes of the price variations. It is to be expected that a compulsory marking of mixtures will be introduced. The writer considers, however, that an exact specification of the proportions in which the various ingredients are combined would in many cases unnecessarily detract from the enjoyment of the smoker.

THE CENTRAL EUROPEAN POWERS—continued.

AUSTRIA.

THE TEXTILE INDUSTRY.

A group of members of the Austrian Lower House has demanded an enquiry into the management and working of the Central Cotton Company and the War Combine of the Cotton Industry. It is stated that the prohibition of the import of paper yarn was to the advantage only of a few textile factories which produce their own paper. The largest textile factory in the Monarchy, which possesses also a paper factory, is the Hungarian Textile Factory Company, whose vice-president is Artur Kuffler, president of the War Combine of the Austrian Cotton Industry and of the Central Cotton Company, on the committee of which latter two other representatives of the Textile Factory Company sit. In Austria the textile factories were combined in 1912 into the United Austrian Textile Industry Company, comprising 376,000 spindles and 2,000 looms. Though business was bad before the war and a good deal of the capital had to be reckoned as lost, in the course of the war the loss has not only been wiped off but a net profit of 15,000,000 kronen made. The revival of this concern runs parallel with the foundation of the Central Cotton Company. The latter secured insight into the business management of private undertakings, whose business secrets were gradually disclosed. In the cotton industry two classes of undertakings were soon distinguished; those which were hard hit by the restrictive orders, and those which flourished more than ever in spite of the restrictions. In consequence of the possibilities of profit opened up for the latter by the war, the Austrian Cotton Trust was created. First the United Textile Industry was amalgamated with the Austrian Textile Works, and Herr Kuffler was appointed vice-president of the whole concern. Then other factories were absorbed, and the Trust now possesses nearly 100 textile factories and has the leading share in Army contracts. Nearly a quarter of the Austrian cotton industry is thus combined in a Trust. Meanwhile the operations of the Central Cotton Company are continually being enlarged. Up to 31st March, 1917, it had achieved in cotton yarns and wares a total turnover of 544,000,000 kronen and a net profit of 5,000,000 kronen. As the Government could no longer let this gigantic monopoly go on as a private undertaking, it was converted into a limited liability company, which was placed on a level with the War Combine of the Cotton Industry. As president of the New Central Company and the War Combine, Herr Kuffler was again appointed. Half of the shares the Spinners' Union kept for itself and distributed not among the members, but among friends and banks. The compact majority is in the hands of a few persons devoted to the president. The two institutions, the Central Cotton Company and the War Combine of the Cotton Industry, are calculated to ruin independent private industry, and as the management of a central company on behalf of a Trust is injurious to the interests of the consumers an open discussion in the Lower House is demanded.—*Neue Freie Presse. Die Zeit.*

PURCHASE OF MINES BY STEEL WORKS.

The *Neue Freie Presse*, in an article on coal development in Austria, lays stress on the importance of making Austria independent of other countries for its supply of coal and coke, and illustrates by a large number of instances the tendency of the industrial concerns, especially the steel works, to secure their own coal mines. The Province of Galicia acquired last year from the West German Thomas-Phosphate Works extensive coalfields, and intends to sink four shafts, whose production will amount to about double the present production of the Province. This will not only supply the demand of the Province, but will leave a surplus for export to Hungary and Poland, besides making Galicia independent of German imports. Details are given of new borings in the Ostrau district, Styria, and Istria, which it is hoped will replace a good part of the English coal imported by Austria before the war.

Among the great industrial works which have bought mines or coalfields in West Bohemia are the Poldi-Hütte, Skoda Works, Böhl Works, Ternitz Steel Works, Berendorff Metal Goods Factory, Mannesmann Tube Works, and most recently the Phoenix Steel Works of the firm of Bleckmann. In the Ostrau district the Depositen Bank has purchased the Dzieditz Coal Works and is about to turn the undertaking into a company, in which the municipality of Vienna is said to be interested, with a view to obtaining coal for the Vienna Gasworks. Other instances are given.

The great wastage which occurs in the transport of coal is to be avoided by converting such coal as will not bear transport profitably into electrical power close to the pit. Great importance is being attached to the production of coke and by-products of coal tar for which Austria is largely dependent on imports from abroad. The Moravian-Silesian Smelting Works have established new coke ovens, which, however, have not been fully worked recently owing to shortage of coal. In consequence of lack of labour, mechanical means of getting coal have been developed: already in the Ostrau-Karwin region one-third of the coal is obtained in this way.

THE CENTRAL EUROPEAN POWERS—continued.**RAW MATERIALS STORED ABROAD.**

The Austrian Government has been asked both by manufacturers and by war economic organisations how stocks of raw materials bought during and before the war and now stored in foreign countries would be treated in case of their import after the conclusion of peace. A binding declaration was especially desired on the question whether such goods could be sold or utilised by their owner, or would be subject wholly or partially to the control of the Central Companies with a view to the satisfaction of the general demand. The matter has been considered by the Raw Materials Committee of the Main Committee for War and Transition Economy, and on the basis of their decisions the Ministry of Trade intends to assure Austrian industrial undertakings that they will be permitted to import such goods for their own use under certain conditions. Among these conditions are that the goods must have been bought before the 1st November, 1917; that notice and particulars of the purchase must be given to the General Commissariat for War and Transition Economy within four weeks of the publication of the present decree; that such goods may not be sold after notification, either abroad or after import, without permission of the General Commissary; that an option to purchase a certain proportion of the goods shall be given to an office designated by the General Commissariat (such proportion not to exceed 30 per cent. of the whole or 50 per cent. of the amount by which the notified quantity would exceed the quota of raw materials to be allotted to the particular undertaking in case of a general rationing of raw materials). There are further stipulations as to the conditions under which this option is to be exercised. —(*Neue Freie Presse.*)

Minerals and Metals.**CANADA.****PROSPECTING FOR SILVER IN ALBERTA.**

The Imperial Trade Correspondent at Calgary reports that a Calgary copper company, owning certain copper deposits near Eldon Siding, on the Canadian Pacific Railway, has discovered on its property a large deposit of silver. This deposit was located about thirty years ago but was abandoned, the vein being apparently lost. Prospecting has been carried on for the last six months and a complete vein, running for about 900 ft. up the mountain side, has now been discovered. The value of the ore—according to analyses made by different assayers—averages about 148 dols. per ton. Further prospecting is being carried on with a view to deciding what machinery, etc., requires to be installed in order to exploit the deposit.

SOUTH AFRICA.**PROJECTED GOVERNMENT BILL AFFECTING MINING LEASES.**

The "Union of South Africa Gazette (Extraordinary)" of 8th January publishes the text of the Transvaal Mining Leases Bill, 1918, which is a Government measure to be introduced during the present Session of the Union Parliament.

The purpose of the Bill is, among other things, to make further provision as to the leasing of the right to work precious and base metals in the Transvaal and for that purpose to amend the Precious and Base Metals Act, 1908, of the Transvaal (Act No. 35 of 1908), in certain respects.

The Bill provides, *inter alia*, that notwithstanding anything to the contrary contained in paragraph (b) of Section 30 of the principal (*i.e.*, the above-mentioned) Act, the holder of mineral rights may, when selecting his *mynpacht* under Section 20 of that Act, apply for a grant of a lease of the undermining rights of an additional area of the ground which is to be proclaimed and which is contiguous to the *mynpacht*.

For the purposes of this Bill a Board (to be styled the Mining Leases Board) is to be established, the function of which is to enquire into any application for a lease or, subject to the provision of Section 14, for an amendment of a lease, whether granted under this Act or under the principal Act, and to recommend whether and to what extent any such application shall be granted or refused.

The above-mentioned copy of the "Gazette Extraordinary" may be consulted by British firms interested at the Enquiry Office of the Department of Overseas Trade (Development and Intelligence).

MINERALS AND METALS—continued.**CHINA.****MINERAL INDUSTRIES OF YUNNAN PROVINCE.**

(From U.M. Consul-General.)

YUNNANFU.

The following is an account of the more important mineral industries of Yunnan, South China:—

TIN MINING AND SMELTING.

The tin producing area of Yunnan is situated about 20 miles from the French railway station, Pi Shas Chai, and it is known as Kotchiu-chang. The city of Mengtaz is situated midway between Kotchiu-chang and the French railway.

The name Kotchiu is usually applied by foreigners to the whole of the district, but strictly speaking it should apply only to the small, though very compact and prosperous, town where the smelting is done. This town is in the centre of the mining district, which is within a circle with a radius of about 10 miles.

EMPLOYMENT OF WESTERN METHODS.

There are several well-known tin-ore producing hills within this circle, the best known being Huang Mao Shan and Marlagar. The former is owned by a group of miners, the wealthiest men in the Province, and the latter by a company in which about one-half of the shares are held privately, and one-half by the Government; it is controlled by the Provincial Government. This latter company was started some five years ago, with the object of monopolising the smelting business and replacing the crude native smelters, which number well over 200. It was found, however, that the modern plant could not produce such good results as the native smelters. It is well known that the ore from particular mines yields a definite percentage of tin when treated by means of the native smelters, but when the ore was given to the new company to smelt by Western methods, nothing like the same percentage was obtained. The result was that the miners refused to send their ore to the new company and restarted their old smelters, which have been going ever since. The tin company's plant has been shut down for some time, and to-day this company, rather than run the whole of their expensive plant, has constructed several native smelters within their compound to deal with the little ore they obtain from their near-by mine.

On the refusal of the miners to give this company any more ore, they were forced to seek supplies elsewhere. They obtained the mining rights for the near side of the Huang Mao Shan, and erected, through a German firm, an aerial railway, connecting the mine with the works, but it was found that though the other side of this famous hill was full of tin ore and had been worked for years, the near side was practically destitute. The railway, from which much was expected, never carried a bucket of ore, and is now being dismantled.

The company have not, however, given up, but have obtained the rights for the other famous hill, called Marlagar, which is above their works, at an altitude of some 2,700 ft. Here it is intended to construct reservoirs and wash the ore before taking it to the works, and the contract for supplying the water has been placed. The pumping set has a capacity of 3,000 tons of water a day. It is anticipated that this pumping set will give them a great advantage, and nine other owners are going to combine and install for their mines a similar set, only on a much larger scale. With the installation of this pumping set, the company will be able to work the whole year and be independent of the rainy season. It is estimated that if pumping sets are installed, the output of tin from the mines can be increased by 400 per cent.

ORE DRESSING AND SMELTING PLANTS.

The plant installed at the company's works consists of the following:—

The Ore-dressing Plant.—Five trommels for the first washing; two ball mills, with four gigs for each, for grinding coarse ore; and a large tube mill for grinding finer ore; fifty-two washing tables of three models and twelve hydraulic classifiers.

The Smelting Works.—Three gas generators supporting six reverberatory furnaces, three refiners, and a blast furnace for dealing with the slag. Each furnace has a capacity of 4 tons of ore per charge. The average charge requires about 18 hours or from 12 to 30 hours, according to the quality of the ore and coal. The coal comes from K'o Pao Tsuen and is of a very low grade, costing only 2 dols. per ton at the pit and, on account of the enormous difficulties in transportation, 20 dols. delivered at the works.

The capacity of the works is said to be 18 tons per day, but the output has never exceeded 9 tons per day.

MINERALS AND METALS—continued.**NATIVE METHODS OF MINING AND SMELTING.**

The native methods of mining and smelting are worth mention. The miners burrow along the sides of a hill thought to contain ore and make holes of about 2½ ft. to 3 ft. in diameter, but not more. These they enter and work without any definite plan, taking torches with them, and return with small bags of ore slung across their shoulders, one on each side of the body. Some of these holes are very deep, and the miner crawls into them on all fours and returns in the same manner, utterly exhausted by the bad air. There are no vertical shafts. One of those burrows is half a mile in length, with innumerable side burrows issuing from it. In some instances where a hill contained much ore the whole of the hill has been removed, and only great chasms and pits now remain.

In the longer burrows, the natives take with them a carbide torch, which very soon fouls the air of the mine. The amount of carbide used per month during the full season is 50 tons.

During a full and prosperous season as many as 200,000 miners, from all parts of the Province, are engaged in the work.

The ore is washed in great sluices at the mines and in every conceivable place where a little water from the rainy season can be retained. In several places the beds of small rivers and streams have been converted into sluices. Water at the mines is very precious. An electric company at Mengtzu was intending to extend its operations to the lighting of Kotchiu, but it was found that there was not enough water available for the boiler feed-pump, so they are compelled to go to the expense of erecting an overhead high-tension transmission line. The water is retained during the rainy season at various places high above the level of the mines, and is then let down by ingenious systems of irrigation ducts and traps, and after washing the ore, is lifted back to the reservoir and the process is repeated.

The natives have an ancient but very ingenious chain pump that lifts the water about 20 ft. high; when it is desired to lift the water to a great height numbers of these chain pumps are fixed one above the other, and they work exceedingly well. Some time ago, a British diaphragm pump was sold to the native miners, but it speedily gave out, the rubber diaphragm soon wearing away.

The native smelter consists of a brick furnace, at the back of which is an air pump, worked by two men, who pump for about two minutes and are relieved by another two, this relay system being continued throughout the day and night. The ore, after being washed and concentrated until it has the fineness of flour, is placed in the top of the smelter, in which a charcoal fire is burning. A small quantity is added from time to time and the tin melts and runs out at the bottom, through an aperture which is kept open by the operator continually poking it. The tin is then run into slabs, whilst the slag is ground by large grinders worked by buffaloes.

EXPORTS.

According to the Customs returns the amount of tin slabs exported during 1916 was 115,233 catties, as compared with 124,401 catties during 1915. The figures for 1917 are not yet available, but it promises to be a record year. Tin was stored by the owners in immense quantities because the price was not favourable, but during May, 1917, prices for tin were a little more favourable, and many realised their stocks, and the railway company carried approximately 175 tons of tin during that month. It is known that an immense quantity of tin, not accounted for in any reports, finds its way out of the Province by other routes, and that a large quantity of tin is used locally.

OPENINGS FOR BRITISH MINING MACHINERY.

There are great opportunities for trade in British machinery at the mines. Innumerable small pumps are needed and mining machinery in general would find a ready market. Numbers of valuable mines have been abandoned on account of the presence of water, and there is at present no attempt to mine the stone that is known to contain very valuable tin deposits, for the lack of adequate machinery. Native miners content themselves with earth tin ore which is easily worked, but if modern machinery were presented to them in a practical manner the market would be enormous.

THE ANTIMONY INDUSTRY.

Antimony, which appears to be abundant in Yunnan, is mined in many places, and more especially around Mengtzu and Tsz Tsuen.

The recent boom in the price of antimony led many to prospect for new mines, with the result that many places were discovered to contain antimony. Difficulties of transportation, however, prohibited any extensive working. Deposits near the railway were worked and a certain quantity of ore was exported in 1916, but, generally speaking, it was found that the cost and difficulty

MINERALS AND METALS—continued.

of transport did not allow of the ore being exported. As a result miners commenced to smelt the ore and reduce it at the mines into slabs, which were of quite good quality, but could not be classed with regulus. Later the price of the mineral fell, with the result that this industry has been checked.

At Tsz Tsuen there is a privately owned and up-to-date smelter containing several furnaces and ovens of French Tonkin make; also one set made in Changsha. Locally mined ore is treated here. The company can produce 50 tons of regulus per month, which is sent to Hong Kong for sale.

COAL MINING AND COKE PRODUCTION.

Coal mines exist in many parts of Yunnan and are worked by the most primitive methods around Amichow and K'o Pas Tsuen. At this latter place there are hills that extend for over 400 li, in which it would seem that the supply of coal on the surface could never be exhausted. The mines, or rather surface workings, have been in operation several hundred years, with no appreciable diminution in the supply. The tools employed are those that the peasants use in farming.

It is reported that about 5,000 tons are extracted annually, most of which is retailed to the French railway company, who prefer it on account of its cheapness.

The mines are situated at a distance of about three miles from the French railway, which fact quadruples the cost of the coal, as the road is well-nigh impassable in rainy weather. It is now proposed to connect the mines with the French railway by a light railway, but it is doubtful whether this will be accomplished for some years.

The coal is soft, sulphurous, and of very poor quality, and in order to maintain a head of steam it is necessary to use steam blowers with the boilers. Those who have visited the mines, however, say that it would not be difficult to obtain good coal if modern methods were employed.

COKE PRODUCTION.

Coke also is produced, being burned near the mines, as certain local industries require coke. In the neighbourhood there are many mines from which coke is extracted, it having been burned in the mine generations ago. At present, it is reported, there are several mines burning near Amichow.

Almost every city in the Province, with the exception of Kotchiu-chang, has coal mines in the locality, which fact should make easy the establishment of electric light plants.

In connection with the foregoing attention may be directed to an article which appeared in the September-October number of the "Bulletin Economique de l'Indo-Chine," prepared by the French Consul at Mengtzu. This article was based on the Chinese Customs Returns and a report by the Commercial Agent of the Haiphong-Yunnanfu Railway Company. The following particulars, additional to those given above, have been taken from this article:—

In 1913 the Yunnan percentage of the world's production of tin was 6.01 per cent.

The present annual production of "concentrates" is estimated at 27,000 or 28,000 "tan," or between 16,000 and 17,000 metric tons, divided into the following categories:— (1) Ore giving at least 64 catties of tin per 112 catties or 58 per cent. (Some yield as much as 70 per cent.) (2) Ore yielding at least 45 catties of tin per 105 catties, or 43 per cent. (3) Ore yielding from 25 to 30 catties of tin per 80 catties, or 38 per cent.

A considerable amount of Yunnan tin exported to Hong Kong is re-imported into China: 56 per cent. in 1914, 32.4 per cent. in 1915. The average re-exports into China amount to 40 per cent.

UNITED STATES OF AMERICA.**DEVELOPMENT OF MINERAL PRODUCTION.**

According to telegraphic information from Washington, which has been issued by the Press Bureau, the Secretary for the Interior has announced a plan for developing American mines. This will release ships from the trade in importing minerals, and so make it possible to utilise them for other cargoes. Ships are now employed in bringing from abroad 2,000,000 tons of minerals yearly for the manufacture of munitions in the United States. American mines, it is said, are capable of supplying every mineral used in the manufacture of munitions. Congress has, therefore, been asked for a special appropriation for experimenting. The development of new deposits and better methods of extraction, and the substitution of home materials will have the effect of making the United States permanently less dependent upon foreign supplies for essential minerals. The minerals mentioned are nitrates, sulphur, manganese, flake graphite, tin, mercury, potash, tungsten, antimony, chromite, magnesite and mica.

Shipping Intelligence.

SIERRA LEONE.

PROCEEDINGS BEFORE PRIZE COURT.

Proceedings have been instituted in the Prize Court in Sierra Leone in respect of the vessel "Twee Ambt," and the cargo laden therein, and also in respect of certain goods on the "Bonna."

Appearance should be entered by all persons claiming an interest as soon as possible.

DENMARK.

FORMATION OF ASSOCIATION OF HARBOUR AUTHORITIES.

H.M. Minister at Copenhagen writes that a newly-formed Association of the Harbour Authorities in Denmark has among its objects the formation of a technical committee for the consideration and improvement of plans for harbour works proposed by local harbour engineers, and the setting up of a body which would discuss harbour matters with other authorities. The representations of such a body, it is thought, would have greater weight than in the case of those put forward by individual municipalities. More particularly, the Association will mediate between the Danish State railways and the harbour authorities, fix the harbour dues and deal with the question of discharging petroleum. The Association, it is said, has been formed on the lines of a similar institution in Sweden, and includes all harbours in Denmark, with the exception of Copenhagen harbour and the State harbour.

FRANCE.

RIVER TRAFFIC BETWEEN ROUEN AND PARIS.

Some interesting details regarding the improvement of navigation between Rouen and Paris are given in the issue of "La Dépêche Coloniale" (Paris) of 1st March.

The journal states that last year the shortage of raw materials, and of fuel in particular, in France was such that serious difficulties arose. Much of this was due to lack of proper organisation. At any given moment between November, 1916, and April, 1917, there were from 1,300 to 1,700 barges, fully laden, remaining in the port of Rouen. As a consequence of the congestion of this port and the port of Havre, from 60 to 100 ships, mostly foreign, were detained for weeks and even months at Cherbourg. It is estimated that the payment of demurrage on these ships, amounting to from 5,000 to 10,000 frs. per day, resulted in an export of gold from the country exceeding 1,000,000 frs.

In order to meet this situation the authorities decided to beacon the Seine between Rouen and Paris, in the same way as the river is beacons between Rouen and Havre, so as to allow of navigation on this part of the river during any of the twenty-four hours of the day. The scheme has just been put into operation, and, it is claimed, with great success. Thus, the journey from Rouen to Paris which formerly occupied five days is now regularly accomplished, even under the most unfavourable circumstances, in fifty-six hours.

OTHER COUNTRIES.

Other Notices of interest to shipping firms appear in the "Imperial and Foreign Trade Section" of the "Journal," as follows:—

CANADA.—Shipbuilding and pilotage.

BRITISH GUIANA.—Tonnage and light dues.

FRANCE.—New pilotage duties at Honfleur. Port improvements at La Rochelle.

SWEDEN.—Reinforced concrete ships. Amalgamation, etc., of shipping companies.

TURKEY.—Ports, routes and markets of Yemen.

UNITED STATES OF AMERICA.—State purchase of German owned piers, etc., at Hoboken.

Under "Notes on Trade," a Notice is published respecting South Australian Harbour Regulations—Bunker Charges.

Commercial Returns.

COTTON IMPORTS AND EXPORTS.

Return of the Number of Bales of Cotton Imported and Exported, Forwarded from Ports to Inland Towns, and Returned to Ports during the month and Two months ended February, 1918, compared with the corresponding periods of the Year.

	Month of Feb.		Two months ended Feb.	
	1917.	1918.	1917.	1918.
IMPORTS.				
American	202,375	234,160	550,435	461,022
Brazilian	9	1,000	1,909	2,129
East Indian	6,090	17,887	18,459	71,914
Egyptian	55,935	85,154	139,774	146,213
Miscellaneous	19,262	121,009*	28,324	34,955
Total	283,671	350,210	738,901	716,233
EXPORTS.				
American	8,036	75	19,229	175
Brazilian	—	—	—	—
East Indian	3,071	—	3,857	—
Egyptian	15,339	—	64,380	—
Miscellaneous	208	—	1,142	—
Total	26,654	75	88,608	175
FORWARDED FROM PORTS TO INLAND TOWNS.				
American	187,447	179,628	408,648	377,620
Brazilian	4,505	2,524	9,902	6,541
East Indian	3,697	5,981	6,378	14,390
Egyptian	27,626	59,291	61,562	98,585
Miscellaneous	7,663	10,170	18,643	18,904
Total	230,938	257,594	505,133	516,040
FORWARDED FROM INLAND TOWNS TO PORTS.				
American	128	4,699	287	7,603
Brazilian	—	—	—	—
East Indian	—	—	—	—
Egyptian	—	—	—	—
Miscellaneous	6	1,735	11	2,604
Total	134	6,434	298	10,207

* Including 58 bales British West Indian, 167 bales British West African, and 2 bales British East African.

† Including 58 bales British West Indian, 167 bales British West African, and 680 bales British East African.

COTTON IMPORTS AND EXPORTS.

Return of the Number of Bales of Cotton Imported and Exported at the Various Ports of the United Kingdom during the week and 10 weeks ended 7th March, 1918:—

	Week ended 7th Mar., 1918.	10 Weeks ended 7th Mar., 1918.	Week ended 7th Mar., 1918.	10 Weeks ended 7th Mar., 1918.
	IMPORTS.			
American	43,318	512,377	—	175
Brazilian	799	2,928	—	—
East Indian	5,578	84,017	—	—
Egyptian	5,105	151,318	—	—
Miscellaneous	587*	36,564†	—	—
Total	60,417	787,204	—	175
EXPORTS.				
American	—	—	—	—
Brazilian	—	—	—	—
East Indian	—	—	—	—
Egyptian	—	—	—	—
Miscellaneous	—	—	—	—
Total	—	—	—	—

* Including 111 bales British West African and 306 bales British East African.

† Including 58 bales British West Indian, 278 bales British West African and 986 bales British East African.

COMMERCIAL RETURNS—continued.

CORN PRICES.

Statement showing the Average Price of British Corn, per quarter of 8 bushels Imperial Measure,* as received from the Inspectors of Corn Returns in the week ended 9th March, 1918, and corresponding weeks of the seven previous years, pursuant to the Corn Returns Act, 1882.

Week ended	9th March,	Average Price.					
		Wheat.		Barley.		Oats.	
		s.	d.	s.	d.	s.	d.
1918	72	3	58	5	52	2
Corresponding week in—							
1911	30	1	24	11	17	6
1912	34	0	31	2	21	8
1913	31	1	27	11	20	2
1914	31	6	26	0	18	7
1915	54	8	33	5	31	0
1916	58	2	55	6	32	3
1917	78	0	63	7	48	7

* Section 8 of the Corn Returns Act, 1882, provides that where returns of purchases of British Corn are made to the local Inspector of Corn Returns in any other measure than the Imperial bushel or by weight or by a weighed measure, that officer shall convert such returns into the Imperial Bushel, and in the case of weight or weighed measure the conversion is to be made at the rate of sixty Imperial pounds for every bushel of wheat, fifty Imperial pounds for every bushel of barley, and thirty-nine Imperial pounds for every bushel of oats.

BANKRUPTCY RETURNS.—ENGLAND AND WALES.

Number of Receiving Orders and Administration Orders (Deceased Debtors' Estates) gazetted in the undermentioned Principal Trades and Occupations during the periods indicated:—

	February.		Two Months ended February.	
	1917.	1918.	1917.	1918.
	No.	No.	No.	No.
Total gazetted	111	60	205	128
Number gazetted in principal trades and occupations:—				
Agents, commission and general ...	—	1	—	1
Bakers	4	2	7	6
Blacksmiths, farriers, &c	—	1	—	1
Boot and shoe manufacturers and dealers	1	2	3	2
Builders	5	1	7	2
Butchers and meat sellers	3	1	5	4
Carriers, cartmen, lightermen, and hauliers	5	—	7	1
China, glass and earthenware dealers	—	1	—	1
Coal and coke merchants and dealers	—	1	1	2
Colliers, miners, &c	1	2	3	3
Corn, flour, seed, hay and straw merchant	1	1	1	1
Dairymen, cowkeepers, &c	3	—	5	1
Decorators, painters, plumbers, glaziers, &c	2	1	3	1
Drapers, haberdashers, &c	1	—	5	3
Engineers, consulting	1	1	1	1
Farmers and graziers	7	3	12	9
Fishmongers, poulterers, &c	3	4	4	4
Gardeners, florists, nurserymen and market gardeners	1	1	1	2
Greengrocers, fruiterers, &c	6	1	9	1
Grocers	3	3	7	5
Ironmongers	—	1	—	1
Jewellers, watchmakers, silver-smiths	2	1	2	1
Merchants, general	3	—	3	—
Milliners, dressmakers, &c	—	1	3	3
Publicans and hotel keepers, &c	6	3	9	7
Tailors	3	4	9	7
Travellers, commercial, &c	1	1	1	2
Wharfingers	—	1	—	1

SESAMUM CROP IN BRITISH INDIA IN 1917-18.

The official "Indian Trade Journal" (Calcutta) of 18th January publishes a final forecast of the acreage under sesamum in British India, and the estimated yield of the crop. This forecast is based upon reports received from Provinces which contain, on an average, 77 per cent. of the total area under sesamum in British India. The total area reported is 4,094,000 acres, which is 18 per cent. less than the area under sesamum (revised estimate—4,994,000 acres) last year. The total yield is estimated at 340,000 tons, a decrease of 26 per cent. as compared with the revised estimate of the yield (457,000 tons) last year.

The season, on the whole, has not been favourable, the crop having been adversely affected by the heavy and continuous rains of September and October in almost all Provinces.

[NOTE.—The area under sesamum in Burma, which averages over 22 per cent. of the total in British India, is excluded. The Hyderabad yield is not yet available. The Madras estimate is not final.]

EXPORTS OF MEAT FROM BRAZIL IN 1917.

The Acting British Consul-General at Rio de Janeiro has furnished the following statistics of the quantity and value of chilled and frozen meat exported from Brazil in 1917, the figures for 1916 being added for purposes of comparison:—

To	1916.		1917.	
	Quantity.	Value.	Quantity.	Value.
	Kilogs.	£	Kilogs.	£
United Kingdom	5,734,340	237,794	3,960,965	190,094
France	4,455,201	172,019	5,184,130	254,638
Italy	16,150,380	682,306	50,419,633	2,402,263
United States	2,486,009	99,933	950,900	46,182
Gibraltar	4,835,006	217,575	*	*
Egypt	*	*	5,936,339	291,283
Total	33,660,936	1,409,627	66,451,967	3,184,460

* Not stated.

NATIONAL INSURANCE (PART II) (MUNITION WORKERS) ACT, 1916.

APPLICATION TO THE UMPIRE.

In pursuance of the Unemployment Insurance (Umpire) Regulations, 1912, Notice is hereby given that the Umpire has received application for decision as to whether contributions are payable or not in respect of the following class of persons:—

505X. Workmen engaged in the manufacture of leather stiffeners, socks and similar leather goods used in the making of boots and shoes.

Any representations with reference to the above application may be made in writing to the Umpire by, or on behalf of, any workman or employer appearing to him to be interested, or on behalf of the Ministry of Labour, and forwarded to the Registrar, Office of the Umpire, 47, Victoria Street, London, S.W. 1, on or before 29th March, 1918.

Notice is further given that the Umpire proposes to give his decision on the above application on or after 1st April, 1918.

EXTRACT FROM REGULATIONS.

3. If before the date specified in the notice any representations with reference to the application are made in writing to the Umpire by or on behalf of any workman or employer appearing to him to be interested, or the Board of Trade, the Umpire shall take those representations into his consideration, and the Umpire may at any time before the said date require any persons to supply to him such information in writing as he thinks necessary for the purpose of enabling him to give a decision.

All such representations and information shall be open to inspection by any employer or workman appearing to the Umpire to be interested or any persons authorised in that behalf by any such employer or workman or the Board of Trade.

4. Any persons claiming to be interested may apply to the Umpire to be heard by him early in reference to any application under these Regulations, and the Umpire may, in any case in which he thinks it desirable, require the attendance of any person before him to give oral information on the subject of any application.

The decision of the Umpire upon the foregoing will be announced in the "Board of Trade Journal" in due course.

**NATIONAL INSURANCE ACTS.
UNEMPLOYMENT INSURANCE
DECISIONS BY THE UMPIRE.**

Pursuant to paragraph (5) of the Unemployment Insurance (Umpire) Regulations, the Minister of Labour hereby gives Notice of the following decisions by the Umpire on questions whether contributions are payable:—

A. The Umpire has decided that contributions ARE PAYABLE in respect of:—

2415. Workmen engaged wholly or mainly in making civilian clothing for discharged soldiers, whether under contract with the War Office or otherwise.

NOTE.—Decisions in which the Umpire has decided that contributions are payable under the National Insurance (Part II.) (Munition Workers) Act, 1916, are indicated by the letter X at the end of the number, e.g., 1554X. Contributions under these decisions are payable as from the 4th September, 1916.

Where no reference is given to an Application, the question has been decided by the Umpire, without notice, as a matter not admitting of reasonable doubt, in accordance with paragraph (2) of the Unemployment Insurance (Umpire) Regulations.

Decisions relating to individual workmen which raise no question of general interest, or which merely apply a principle laid down in a previous decision, are not published.

**FOREIGN AND COLONIAL PUBLICATIONS
RECEIVED.**

The following is a list of the more important Articles on Trade subjects contained in the Foreign and Colonial Publications recently received and filed for reference at the Department of Overseas Trade (Development and Intelligence), and which are available for inspection at the Offices of the Department, 73, Basinghall Street, London, E.C. 2:—

Commercial, Financial, and Economic.

- Argentine Industries in 1913: Census Figures.
"El Resumen" (Buenos Aires), 15th December.
- Bulgaria: Economic Conditions in 1916.
"Commerce Reports" (Washington), 31st December.
- United States: Bank Resources in 1917.
"Journal of Commerce" (New York), 31st January.
- France: The Lyons Fair, 1918.
"Bulletin des Halles" (Paris), 23rd February.

Metals, Mining, and Machinery.

- (1) Metal Markets of Australasia in November.
- (2) Copper Industry in Australia.
"Australasian Hardware and Machinery" Melbourne, 1st December.
- Gold and Silver Output of the United States in 1917.
"Journal of Commerce" (New York), 8th February.
- Trackless Trolleys in Foreign Countries.
"Commerce Reports" (Washington), 22nd January.

Agricultural, Dairy and Forest Products.

- (1) Report on Crop Experiments at the Government Farm, Gwebi, during 1916-17.
- (2) Notes on Live Stock and Produce at Rhodesian Shows in 1917.
"Rhodesia Agricultural Journal" (Salisbury), October.
- Meat Market in Paris.
"Bulletin des Halles" Paris, 18th, 20th and 21st February.
- Sesamum Crop of British India in 1917-18: Final General Memorandum.
"Indian Trade Journal" (Calcutta), 18th January.
- Fodder Supply in the Madras Presidency.
"Indian Trade Journal" (Calcutta), 25th January.

Textiles and Textile Materials.

- Cotton Spinning and Weaving Returns of India, April-November, 1917.
"Indian Trade Journal" (Calcutta), 25th January.
- (1) Cotton Textile Trade in Paraguay.
- (2) Fine Carpets Industry in Bulgaria.
"Commerce Reports" (Washington), 3rd January.

Shipping and Transport.

- Utilisation of Steam Tramways for the Transport of Goods.
"Bulletin des Halles" (Paris), 23rd February.
- Report for 1916 of the Central and West African Railways.
"Commerce Reports" (Washington), 29th December.

Miscellaneous

- Manufacture of Chemicals in France.
"Journal of Commerce" (New York), 31st January.
- (1) Salt Industry in Madras: Recent Shortage.
- (2) Natural Indigo Industry in British India in 1916-17: Its Position and Prospects.
"Indian Trade Journal" (Calcutta), 25th January.
- Oil Industry in Persia: Increased Production.
"Commerce Reports" (Washington), 22nd January.
- Paper Industry Development in Canada.
"Journal of Commerce" (New York), 7th February.
- Toy Industry in New Zealand: Work for Disabled Soldiers.
"Dominion" (Wellington), 5th December.
- Roofing Material Problem in New Zealand.
"Evening Post" (Wellington), 8th December.

**FOREIGN AND COLONIAL PUBLICATIONS—
continued.**

Miscellaneous—continued.

- Indigo Production in South Fukien Province, China.
"Commerce Reports" (Washington), 2nd January.
- Crown Cork Trade: World's Markets.
"Commerce Reports" (Washington), 17th January.
- Shells suitable for Button Manufacture in Japan.
"Commerce Reports" (Washington), 3rd January.
- British Dyes in Egypt.
"Indian Trade Journal" (Calcutta), 18th January.

OTHER PUBLICATIONS RECEIVED.

Australia—

- ADELAIDE.—Department of Mines: Review of Mining Operations in the State of South Australia, July-December, 1916.
- VICTORIA.—Report under the Land Act, with Appendices and Report of the Land-Purchase and Management Board for 1916-17.
- TASMANIA.—Annual Report for 1917 of the Hobart Chamber of Commerce.

British India.—

- Department of Statistics—
Wheat Prices in India—Return showing the Wholesale and Retail Prices from the second half of July, 1914, to the first half of November, 1917.
- Annual Statement for 1916-17 of the Sea-borne Trade and Navigation of Burma with Foreign Countries and Indian Ports.
- Report for 1916-17 on the Maritime Trade and Customs Administration of Burma.

Canada.—

- PROVINCE OF QUEBEC.—Department of the Provincial Secretary: Report for 1916-17 of the Superintendent of Public Instruction: Educational Statistics for the School Year 1915-16.

New Zealand.—Taranaki Iron Sands.

**TRADE ENQUIRY OFFICES IN LONDON OF
THE SELF-GOVERNING DOMINIONS.**

These Enquiry Offices are maintained in London at the following addresses by the Governments indicated, viz.:—

- Dominion of Canada.—19, Victoria Street, S.W. 1; also Portland House, Basinghall Street, E.C. 2 (Office of the Canadian Government Trade Commissioner).
- Commonwealth of Australia.—Australia House, Strand, W.C. 2.
New South Wales.—Sydney House, 26-7, Cockspur Street, Trafalgar Square, S.W. 1.
Victoria.—Melbourne Place, Strand, W.C. 2.
Queensland.—409, West Strand, W.C. 2.
South Australia.—112, Strand, W.C. 2.
Western Australia.—Savoy House, 115-6, Strand, W.C. 2.
Tasmania.—56, Victoria Street, S.W. 1.
- Dominion of New Zealand.—413, Strand, W.C. 2.
- Union of South Africa.—Trades Commissioner, 90, Cannon Street, E.C. 4.

Trade enquiries in regard to Rhodesia may be made at the office of the British South Africa Co., 2, London Wall Buildings, E.C. 2.

**NOTICE:
Subscriptions and Advertisements.**

The price of the new issue of the "Board of Trade Journal" is 6d. (6½d. post free). Annual subscription (post free) 27s. 6d. in the United Kingdom. Overseas subscription 31s. 6d. per annum, post free. Subscribers will continue to receive their copies without increase of price until their current subscriptions expire.

No trade advertisements will be inserted in the "Journal" after 31st March, upon which date existing contracts terminate.

The Editorial Offices are at 73, Basinghall Street, London, E.C. 2. All editorial communications should be addressed to "The Editor."

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 Barr, James C., Ltd., Chemical and Colour Merchants, 27, Blythswood Square, Glasgow.

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 Curtis's & Harvey, Ltd., Cannon Street House, London, E.C. 4.
 Nobel's Explosive Co., Ltd., Nobel House, 195, West George Street, Glasgow.

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 Roxburgh, Robert, Ltd., Nineveh Road (off Soho Road), Birmingham.

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 Carter & Co., Ltd., Encaustic Tile Works, Poole.

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BUYERS' GUIDE—continued.

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Engineers and Contractors—
 Bullivant & Co., Ltd., Reg. Offices, 72, Mark Lane, London, E.C.; Works, Millwall, London, E.

Engineers' Ironfounders—
 Wigan Coal and Iron Co., Ltd., Wigan.

Engineers and Millwrights—General—
 Aveling & Porter, Rochester (Locomotives, Road Rollers, etc.).

Baird, W., & Co., Glasgow (Pig Iron, Coal, Coke, etc.).

Gillott, John, & Son, Lancaster Works, Barnsley, Yorks, Eng.

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Saxby & Farmer, Head Offices, 53, Victoria St., Westminster, S.W.; and Works, Chippenham, Wilts.

Engravers for Printing Purposes—
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Essence Manufacturers—
 Hay, William, Ltd. (Concentrated Soluble and Fruit Essences). Head Office and Laboratories: Hull. London Depot: 3, York Street, Walworth, S.E.

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Glass Works, Aston, Birmingham.
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Llewellyn Ryland, Ltd., Baskerville Place, Birmingham.

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The M-L Magneto Syndicate, Ltd., Victoria Works, Coventry. Telegrams: "Carbide Coventry." Telephone 1008.

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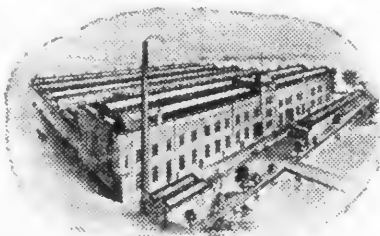
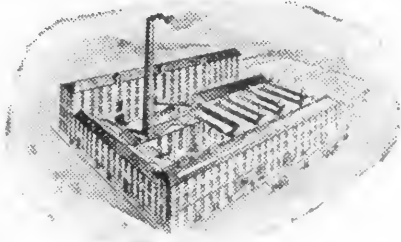
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Bright, John, & Bros., Ltd., Rochdale.

Needles, Hypodermic and Surgical—

Moore, George, National Works, Redditch, London and Export Agents, Wilfred Turner & Co., Ltd., 30, Craven Street, Strand, W.C. 2. Surgical and Hypo-Needles of every description; specialists in Hypodermic Needles as supplied to H.M. War Office, Ministry of Munitions, India Office, Belgian, Italian and Foreign Governments, etc. Also for "Record" and all other Hypo-Syringes. Wilfred Turner & Co., Ltd. Phone 2221 Gerrard. We carry stock of Hypo-Needles as far as circumstances permit at our London Office.

Nickel and Cobalt Refiners—

Wiggin, Henry, & Co., Ltd., 55, George Street, Birmingham.

Nickel and Nickel Salts—

The Mond Nickel Co., Ltd., 39, Victoria Street, London, S.W.

Nickel Silver and Electric Plate—Spoons and Forks—

Tay, W., & Sons, Ltd., 30/34, Leopold Street, Birmingham. Eureka Spoons and Forks.

Night Lights—

Prices' Patent Candle Co., Ltd., London, S.W.

Oil and Grease Manufacturers—

Adolph Heas & Bro., Ltd., Kirkstall Road, Leeds. Oleines (Distilled and Soluble), Stearines, Pitches, Woolfats.

Dexters, Ltd., 362, City Road, London, E.C. Grindley & Co., Ltd., Poplar, London, E. Tels: "Resinous Pop. London."

Snowdon, Sons, & Co., Ltd., Millwall, London, E. Manufacturers of Snowdrift, Snosone, Snowdene and Sinol (Cylinder) Lubricants.

Stern's Ltd., Royal London House, Finsbury Square, London, E.C.

Vickers, Benjn., R., & Sons, Ltd., Gascoigne Street, Leeds. Wool Spinning Oils, Shoddy, Rope and Leather Oils, Steam Ship Oils, and Lubricants.

BUYERS' GUIDE—continued.

- Oil and Grease Merchants—**
Mead-King, Robinson & Co., Ltd., Liverpool and Manchester. Whale Oil, Crude and Filtered, Fish Oil, Lubricating Oil and Grease, Petroleum, Paraffin Wax, "Hydrolene" Bitumen, Petroleum Jelly, Oleine, Stearine, Wool Grease—"Giant" Vapourising Oil for Oil Engines—"Northern Light" Kerosene specially packed in cases for export.
- Oil Can and Lamp Manufacturers—**
Webster, Isaac, & Sons, Ltd., Abbey Works, Kirkstall, Leeds.
- Oil Mill Machinery—**
Middleton & Co., R., Sheepscar Foundry, Leeds.
Rose, Downs & Thompson, Ltd., Old Foundry, Hull, and 12, Mark Lane, London, E.C. Latest and most up-to-date systems of seed crushing oil extraction, refining, etc.
- Oil Press Bagging Manufacturers—**
Paley & Donkin, Ltd., Cottingham, near Hull. Telegrams: "Donkin, Cottingham-Yorks." Code: 5th Edition, A. B. C. Telephone: 200 Cottingham.
- Oil Refiners, Distillers, and Manufacturers—**
Adolph Hess & Bro., Ltd., Kirkstall Road, Leeds.
Prices' Company, Ltd., Battersea, London, S.W.
Stanley Earle & Co., Ltd., Coronet Oil Works, Hull. Cables, "Refiners," Hull. Boiled Linseed Oils, Thickened Oils, Belt Paste, Soft Soap, etc.
Stern's, Ltd. (Soluble, Inanulating, Transformer, Turbine, Screw-cutting, Leather, Motor, etc. Oils), Royal London House, Finsbury Square, London, E.C.
- Oil Refiners, Grease and Insulating Varnish Manufacturers—**
Bartoline (Hull), Ltd., 2, Myton Place, Hull.
- Oils and Greases—**
Job Brothers, Tower Buildings, Liverpool. Whale Oil (Crude and Filtered), Seal Oil (White and Lower Grades), Cod Oils, Fish Oils, Fatty Acids, Wool Grease, Stearines
- Old and Obsolete Stores of every description—**
Phillips, John, & Sons, Ltd., Dingley Road, City Road, London, E.C. 1.
- Ores—**
Ashover Mines Ltd., Ashover, near Chesterfield. Products: Lead, Fluorspar, Ochre, etc.
Blackwell, G. G., Sons, & Co., Ltd., The Albany, Liverpool, and at 10, Eastcheap, London, E.C. Purchasers and dealers in Wolfram, Molybdenite, Vanadium, Chrome, Manganese, and all Metalliferous Ores.
- Overmantels, Grandoles, Etc.—**
Wither, A. W., & Co., 7, Leonard Street, Finsbury, London, E.C.
- Oxalic Acids—**
Barr, James C., Ltd., Chemical and Colour Merchants, 27, Blythswood Square, Glasgow.
- Oxy-Acetylene Metal Cutting and Welding Plants—**
The Acetylene Corporation, Ltd., 49, Victoria Street, Westminster, London.
Imperial Light, Ltd., 123, Victoria Street, London, S.W.
- Packings, Hydraulic and Pump—**
Snowdon, Sons, & Co., Ltd., Millwall, London, E. Snowdon's Metallic Packing.
- Packings, Hydraulic and Pump, S.E.A. Rings—**
Trist, Ronald & Co., Ltd., 4, Lloyd's Avenue, London, E.C.
- Paint Manufacturers—**
Dampney, J., & Co., Ltd., Cardiff. London Office, 87, Bishopsgate, E.C.; also at Liverpool, Manchester, Leeds, Newcastle-on-Tyne, and Paris. Specialities for Iron and Steel Structures, Water Tanks, etc., "Miraculum" Graphite Paint, "Asphaltene" bituminous paint, etc.
Farquhar & Gill, Aberdeen. Estd. 1818. Makers of every description of Paints, Colours, Varnishes, and Enamels.
Hanger, Watson & Harris, Ltd., Stoneferry Works, Hull; Wellclose Square, London, E.; 23, Bath Street, Liverpool. Paints, Colours, Varnishes, Enamels, Distemper and Oils. Sole Proprietors of the "Lady" Brand Specialities.
Holden, Arthur, & Sons, Ltd., 218/219, Bradford Street, Birmingham. Paints, Colours, Enamels, Varnishes, Lacquers, Japans.
Hoyle, Robson, Barnett & Co., Ltd. Established 1798. Head Office: Newcastle-on-Tyne.

BUYERS' GUIDE—continued.

- Paint Manufacturers—continued.**
Pilchers, Ltd., Morgan's Lane, London, S.E. Colours, Paints, Varnishes, Enamels, Distempers. Sole Proprietors "Pilcher's Stoprot" and "Pilcher's Rustnot" Preservatives.
Sanderson, A., & Co., Ltd., Kingston Paint, Colour and Varnish Works, Hull. Established 1853. Telegrams: "Varnish, Hull." Manufacturers of Paints, Colours, Varnishes, Enamels, Compositions, Distempers, etc.
- Paper Bag Makers—**
Crowther & Co., 115, Middlesex Street, London.
- Paper Fasteners—**
Proctor, Avery & Wood, Chapel Works, Bond Street, Birmingham.
- Paper Makers and Stationers (Wholesale and Export)—**
Bowater, W. V., & Sons, Ltd., 159, Queen Victoria Street, London, E.C.
Hodgkinson, W. S., & Co., Wells, Somerset.
Strong, Hanbury & Co., Ltd., 197, Upper Thames Street, London, E.C.
- Paper Makers—**
Lloyd, Edward, Ltd., 4 and 5, Salisbury Court, London, E.C.
Tullis, Russell & Co., Markinch, Fife.
- Paper Shavings—**
Powell, Lane & Co., Paper Works, Gloucester, England.
- Paraffinium Liquidum and Petroleum Jellies—**
Snowdon, Sons, & Co., Ltd., Millwall, London, E. B.P. & Technical qualities.
Stern's, Ltd., Royal London House, Finsbury Square, London, E.C.
- Patent Fuel Machinery—**
Middleton & Co., Robert, Sheepscar, Leeds.
- Patent Fuel Manufacturers and Shippers—**
The Crown Preserved Coal Co., Ltd., Cardiff.
- Pavement Light Lenses—**
Stevens, James, & Son, Victoria Glass Works, Birmingham.
- Pen Manufacturers (Steel and Metal)—**
Hinks, Wells & Co., Buckingham Street Steel Pen Works, Birmingham.
- Perforated Metal—**
Harvey, G. A., & Co. (London), Ltd. (late of Lewisham), Greenwich Metal Works, Woolwich Road, London, S.E.
- Petroleum Jellies and Oils—**
Mead-King, Robinson & Co., Ltd., Liverpool.
Stern's, Ltd., Royal London House, Finsbury Square, London, E.C.
- Petrous Flooring Tiles—**
Carter & Co., Ltd., Encaustic Tile Works, Poole.
- Phosphor Bronze—**
Billington & Newton, Longport, Staffs.
Clifford, Charles, & Son, Ltd., Birmingham.
- Phosphor Tin and Phosphor Copper—**
Billington & Newton, Longport, Staffs.
- Photographic Lens and Camera Manufacturers—**
Ross' Optical Works, 3, North Side, Clapham Common, S.W.
- Photographic Papers, Films and Plates—**
Rajar, Limited, Moberley, Cheshire (Estd. 1901).
- Pitch—**
Miller, Jas., Son, & Co., 79, West Nile Street, Glasgow.
- Plate Polish—"Silveret"**
The Nubian Manufacturing Co., Lorrimore Street, London, S.E.
- Plumbago—**
Blackwell, G. G., Sons, & Co., Ltd., The Albany, Liverpool, and at 10, Eastcheap, London, E.C.
- Plywood—**
Venesta, Ltd., 1, Great Tower Street, London, E.C. "Venesta" Plywood in all woods. Write for Descriptive Booklet.
- Polishing Machinery and Materials—**
Canning, W., & Co., Great Hampton Street, Birmingham.
- Portable Buildings—**
Humphreys, Ltd., Knightsbridge, London, S.W.
- Post-Cards—**
E. W. Savory, Ltd., Park Row Studios, Bristol. The "Clifton" post-cards in a great variety of attractive styles.
- Potters—**
Kennedy, H., & Sons, Ltd., Barrowfield Potteries, Glasgow.
- Power Transmission—**
Cradock, G., & Co., Ltd., Wakefield, England.

BUYERS' GUIDE—continued.

- Press Tools and Tin Box Making Machinery—**
Waller & Co., Ltd., 28/32, Vauxhall Walk, London, S.E. Simple Canister-making Plants for double-seamed, slip-over, lever-tins. Telegraphic Address—"Stanings, London."
- Pressure Gauges—**
Salter, Geo., & Co., West Bromwich.
- Printers (Catalogue)—**
Barnicott & Pearce, The Wessex Press, Taunton. Telegrams: Barpearce, Taunton. Codes: A.B.C. and Unicode. Telephone: 1000.
- Printers' Leads and Clumps—**
Taylor & Watkinson, Belgrave Foundry, Briggate, Leeds. Machine Cast and Lead Leads and Clumps. Cable: "Pica," Ltd. Telephone: 4011 Central. Code: A. B. 5th Edition.
- Printers' Metals—**
Blackwell, G. G., Sons, & Co., Ltd., Albany, Liverpool, and at 10, Eastcheap, London, E.C.
- Printing Ink Manufacturers—**
Dane & Co., Manufacturers of Printing Colour Varnishes, etc., London and Edinburgh.
Horsell, Frank, & Co., Ltd. Manufacturing Printing Inks, Colours, Varnishes, etc., tona Road, Leeds, S.; also London, Birmingham and Edinburgh, etc.
Winstone, B., & Sons, Ltd., London.
- Prism Binocular Manufacturers—**
Ross' Optical Works, 3, North Side, Clapham Common, S.W.
- Proprietary Articles, Specialities, &c.—**
Dalmas, A. de St., & Co., Leicester. (Metals, Plaisters.)
Henry's Calcined Magnesia (T. & W. Hart, Manchester).
- Provisions (Export and Import)—**
Pearson & Rntter, Ltd. Established 1841, Stanley Street, Liverpool. (Cable: "Pearutter," A. B. C. 5th Edition.
Warren, Sons, & Co., Aldgate East, London, E. Ham, Bacon and Cheese Specialities. Cables: "Daydawn, London." A. B. C. Code, 5th Edition.
- Pump Governors—**
Trist, Ronald & Co., Ltd., 4, Lloyd's Avenue, London, E.C.
Quilts (Toilet, Satin, Honeyscomb, and Alhambra)—Johnson, J., Hodgkinson & Pearson, Ltd., Manchester.
- Rag Merchants—**
Jacobs Bros. & Co., West End Mills, Dewsbury. Cables: "Whatever, Dewsbury."
- Railway Appliances—**
Saxby & Farmer, Ltd., Head Offices, Victoria Street, Westminster, S.W. 1, Works, Chippenham, Wilts. (Railway Signals, etc.)
- Railway Lamp Lenses—**
Stevens, James, & Son, Victoria Glass Works, Dartmouth Street, Birmingham.
- Railway Signals—**
Saxby & Farmer, Ltd., Head Offices, Victoria Street, Westminster, S.W. 1, Works, Chippenham, Wilts.
- Rail Welding—**
Thermit, Ltd., 675, Commercial Road, London, E.
- Rainproof Cloth Manufacturers—**
Garnett, G., & Sons, Ltd., Apperley Bridge, Yorkshire.
- Ramie Yarns—**
The Yorkshire Ramie Spinning Co., Ltd., Kirkstall, Leeds.
- Recorders (Mechanical or Electrical Level and Notch)—**
Kent, Geo., Ltd., High Holborn, London, W.C.
- Refrigerating Machines—**
Sterne, L., & Co., Ltd., The Crown Works, Glasgow.
- Refrigerators—**
Haslam Foundry & Engineering Co., Ltd., The Derby.
- Retorts—**
Stevens, J., & Son, Dartmouth Street, Birmingham.
- Ropes for Driving—**
Hart, Thomas, 12 and 14, Town Hall, Blackburn; Lambeth Rope Works, Blackburn. Telephone: 10 Blackburn. Telegraphic Address: "Hart, Blackburn."
- Ropes (Manilla and Wire Ropes)—**
Hall's Barton Ropery Co., Ltd., 83, High Street, Hull. Manufacturers of Manilla, Hemp, Coir, Cotton and Steel Wire Ropes.

BUYERS' GUIDE—continued

Ropes (Steel Wire)—
Craddock, G., & Co., Ltd., Wakefield, England

Ropes (Wire and Hemp), Cordage, Twines, &c.—
Wright, John & Edwin, Ltd., Universe Works, Garrison Street, Birmingham.

Ropeways, Aerial—
Craddock, G., & Co., Ltd., Wakefield, England.

Ryein Distillers—
Grindley & Co., Ltd., Poplar, London, E. Telephone: "Resinous, Pop. London."

Rubber Bands and Erasers—
Tennyson & Co., Ltd., Leeds.

Sacks and Bags—
Judge, T. & W., London, E.C. (Cotton).
Kalisky, S., 50A, Princes Square, St. George's, London, E. Telephone: Avenue 3154.
Paiva, J. de, & Co., 11, Drury Lane, Liverpool.

Sacks, Bags, Jute, Hoopline, Tarpaulins, Twines, &c.—
Macdiarmid, A. M., & Co., Manufacturers 165, Victoria Road, Dundee, Scotland. Contractors to H.M. Government. Telegrams: "Expansion, Dundee."

Sacks, Bags, Jute Hoopline, Tarpaulins, Yarns—
Duncan, George & Co., 94, Commercial Street, Dundee.

Saddlery—
Cliff, Jahex, & Co., Globe Saddlery Works, Walsall.
Leckie, John, & Co., Goodall Street, Walsall, and 84, Fore Street, London, E.C.

Salt Manufacturers—
Hobbs, Hart & Co., Ltd., London, N.
Withers, Samuel & Co., West Bromwich; the Old and Original Firm. Established 1843. Contractors to H.M. Government; annual output over 3,000 safes.

Safety Fuse Manufacturers—
Nobel's Explosives, Co., Ltd., Glasgow.

Salt (Vacuum) Manufacturers—
Electro Bleach and By-Products, Ltd., Middleswich Cheshire.

Sanitary Appliances—Stoneware—
Mansfield, H. R., Church Gresley, Burton-on-Trent.

Saw Mill Engineers—
Robinson, Thomas, & Son, Ltd., Rochdale. London: 79, Queen Victoria Street, E.C.

Scale Manufacturers—
Pooley, Henry, & Son, Ltd., John Bright Street, Birmingham.

Seeds—
Bath, R. H., Ltd., Wisbech, Cambs, England. Seed Growers and Exporters. Vegetable and Flower Seeds of the best quality only. Seed Potatoes from the famous alluvial soils of the Wash a speciality. Catalogues and quotations free on application.
Johnson, W. W., & Son, Ltd., Boston, England (Estab. 1820), Wholesale Seed Growers and Exporters. Write to us if you are in need of our Pedigree Selections of Garden, Farm and Flower Seeds.
Kelway & Son, Wholesale Seed Growers and Exporters, Langport, Somerset, England. The best stocks (only) of Garden and Farm Seeds. Special quotations on application.
King, John K., & Sons, Seed Experts and Pedigree Seed Growers, Coggeshall, Essex, England. Established 1793. All Seeds for Farm and Garden, also Seed Potatoes exported to all parts of the World. Catalogues free.

Shellbox Manufacturers and Shell Merchants—
Harvey, Henry, & Co., 68, Milton Street, London, E.C.

Shipping Agents—
Davies, Turner & Co., Ltd. Estd. 1870. Foreign Carriers to and from all parts of the World, and Underwriters. C.O.D. a speciality. Chief Office: 52, Lime Street, London, E.C. 3. Tel.: Avenue 4810 (4 lines). Cables: "Spedition." London, Liverpool, Manchester, Leeds, Glasgow, Bristol, Birmingham, New York, Boston, Philadelphia, Chicago. Bankers for reference—London County and Westminster Bank, St. Mary Axe, London, E.C. 3.
Van Oppen & Co., Ltd. Head Offices and Export Department: 90-91, Bartholomew Close, London, E.C.1. Import and Storage Department: 23-24, Little Britain, London, E.C.1. Telephones: 1770 City (5 lines). Telegrams for London and Branches: "Vanoppen." Also at Belfast, Birmingham, Bradford, Bristol, Liverpool, Leeds, Leicester, Manchester, Montreal, Paris, Boulogne, Rotterdam, Amsterdam.

BUYERS' GUIDE—continued.

Ship and Engineers' Furnishers—
Loveridge, Ltd., Cardiff (Admiralty Contractors.)

Ship's Block Manufacturers—
Loveridge, Ltd., Cardiff. (Admiralty Contractors.)

Ship's Lamp Lenses—
Stevens, James, & Son, Victoria Glass Works, Dartmouth Street, Birmingham.

Shirt and Collar Manufacturers—
Nimmon, R., & Co., Ltd. Established 1898. Crown Factory, Londonderry. Telegraphic and Cable Address: "Nimmon Factory, Londonderry."

Shop Fittings—
Harris & Sheldon, Ltd., Stafford St., Birmingham.
Sage, Fredk., & Co., Ltd., Shopfitting Specialists, Gray's Inn Road, London, W.C.; and at Paris, Buenos Aires, Valparaiso and Johannesburg.

Shutters (Revolving) Gates, &c.—
Dennison, Kett & Co., Ltd. (Successors to Clark, Bunnett & Co., Ltd.), 11, Queen Victoria Street, London, E.C. As supplied to the Admiralty, War Office, Home Office, L.C.C., Colonial and Foreign Governments, Railway, Tramway and Dock Companies, etc.

Silversmiths
Horton & Allday, 195, Warstone Lane, Birmingham. Telephone: 1755 Central. Telegraphic Address: "Silversmiths." London Show Rooms: 47, Poland Street, Oxford Street, W. Telephone: 9762 City. Telegraphic Address: "Hemicycle."

Sizing Materials for Textile Mills—
Snowdon, Sons, & Co., Ltd., Millwall, London, E. Snowdrift Brand.

Slate Merchants and Manufacturers—
Davies, Bros., Portmadoc, North Wales.

Slate Quarry Owners—
Oakeley Slate Quarries Co., Ltd., North Wales, and 26, Suffolk Street, Pall Mall East, London, S.W. 1.

Slate Working Machinery and Manufacturers—
Turner Bros., Newtown, North Wales.

Soaps (Cleaning and Polishing)—
Anti-Sorub Soap Co., Dewsbury, Yorks.

Soap Manufacturers—
Price's Patent Candle Co., Ltd., Battersea, London, S.W.
Rowe, T. B., & Co., Ltd., Thames Soap Works, Brentford, Middlesex.

Soda—
Brunner, Mond & Co., Northwich, Cheshire. Electro Bleach and By-Products, Ltd., Middleswich, Cheshire.

Spade and Shovel Manufacturers—
Stockton Heath Forge, Warrington. Established 1770. T. N.: B. T. A.: "Stockton-heath Forge, Stocktonheath." Sole Manfrs. of Caldwell's Patent Spades and Shovels with Solid Blades and Straps.

Sponges (Importers and Exporters)—
Phillips, John, & Sons, Ltd., Dingley Road, City Road, London, E.C.

Sporting Cartridge—
Curtis & Harvey, Ltd., Cannon Street House, London, E.C. 4.
Nobel's Explosives Co., Ltd., Nobel House, 195, West George Street, Glasgow.

Spring Balances—
Salter, Geo., & Co., West Bromwich.

Springs—
Salter, Geo., & Co., West Bromwich. Telegrams: "Salters, West Bromwich." Makers of all kinds of Springs, including Railway Bearing and Buffer Springs, Agricultural Machinery Springs, Brake Springs, Door Springs, Dashpot Springs, Dancing Room Floor Springs, Motor Springs, Nest Springs, Tines for Agricultural purposes, Valve Springs, Volute Springs, Thackray and Grover Washers, &c. Contractors to the War Office, Admiralty, Foreign and Colonial Governments, English and Foreign Railways, &c. London Office: 50, Lime Street, E.C. 3.
Sterne, L., & Co., Ltd., The Crown Iron Works, Glasgow.

Stationers' Manufacturers for Export, and Wholesalers—
Writing Pads and Compendiums in all sizes and to all requirements, Combined Letter-Envelopes, Indoor Games, &c.—Jarrod & Sons, Ltd., Norwich. London Showroom: 11, Warwick Lane, E.C. 4.

BUYERS' GUIDE—continued.

Stationers' Sundries Manufacturers—
King Brothers, 15, Bury Street, London, E.C. 3. India Rubber Erasers, Ink Bottles and Stands, Letter Files, Perforators, Paper and Letter Clips, Rulers, Paper Weights and all kinds of Stationers' Sundries and School Materials.
Wright, Geo., & Co., Head Quarters for Stationers' Sundries, The "Requisite House," 92, Clerkenwell Road, London, E.C. Contractors to the Home and Colonial Governments, the London County Council, etc. Manufacturers to the Wholesale and Export Trade. Scholastic:—Rules, Drawing Instruments, Wright's "Black-ink," Blackboard Renovator, Dustless Chalk, Nature Study Box, etc. Commercial:—Filing Apparatus, Ink-stands, Stationery Cases, Cash Boxes, Wright's Pencil-pointed Pens, and General Office Sundries. Fancy:—Tourists' Writing Cases, Penholders, and Games.

Steam Turbines—
Howden, J., & Co., Ltd., 195, Scotland Street, Glasgow.

Steamship Owners and Brakers—
The Power Steamship Co., Ltd., 158, Leadenhall Street, London, E.C.

Steel Castings, Steel and Iron Forgings, &c.—
Baird, W., & Co., Glasgow.
Steel Company of Scotland, Ltd., Glasgow.

Steel and Iron Castings—
Gillott, John & Son, Dominion Works, Barneley, Yorks, Eng.

Steel and Iron Merchants—
Eastern Export Co., Ltd., 5, Lloyds Avenue, London, E.C. 3.

Steel and Iron Shaffing, &c.—
Steel Company of Scotland, Ltd., Glasgow.

Steel Manufacturers—
Parkgate Iron & Steel Co., Ltd., Rotherham. Steel Company of Scotland, Ltd., Glasgow.
Stewarts & Lloyds, Ltd., Glasgow and Birmingham.
The Wigan Coal and Iron Co., Ltd., Wigan.
Turton Brothers & Matthews, Ltd., Sheffield.

Steel Manufacturers (Nickel and other Alloy Steels)—
Craddock, G., & Co., Ltd., Wakefield, England.

Steel Pipes—
Piggott, Thos., & Co., Ltd., Atlas Works, Spring Hill, Birmingham. Telegrams: "Atlas, Birmingham." Welded and Riveted Steel Pipes of large diameters.

Steel Sheets—
Lysaght, John, Ltd., Orh Works, Newport, Mon. Makers of all grades of Steel Sheets.

Steel Tubes—
Oriental Tube Co., Ltd., West Bromwich, Birmingham.
Stewarts & Lloyds, Ltd., Glasgow & Birmingham.

Stoneware Bottles—
Kennedy, H., & Son, Ltd., Barrowfield Potteries, Glasgow.

Stoves and Grates of all descriptions—
Planet Foundry Co., Ltd., Guide Bridge, near Manchester.

Strong Rooms—
Hobbs, Hart & Co., Ltd., London, N.

Sugar Machinery—
Hill & Herbert, Ltd., All British Works, Leicester.

Sulphate of Ammonia—
Miller, Jas., Son & Co., 79, West Nile Street, Glasgow.

Sulphate of Copper—
Dennis, James H., & Co., 49, Queen Victoria Street, E.C. 4.
The Mond Nickel Co., Ltd., 39, Victoria Street, London, S.W.

Sulphate of Soda Manufacturers—
Blythe, Wm., & Co., Ltd., Church, Lancs.

Sulphuric Acid Manufacturers—
Blythe, Wm., & Co., Church, Lancs.

Sulphuric Acid Manufacturers' Retorts—
Stevens, J., & Sons, Birmingham.

Surgical Instruments—
Holborn Surgical Instrument Co., Ltd., 26, Thavies Inn, Holborn Circus, London, E.C. Manufacturers of high-class Surgical Instruments, Sterilisers, Hospital Furniture, Trusses, Elastic Stockings, Belts, Spectacles, Artificial Limbs.

Surveying Instrument Makers—
Cooke, T., & Sons, Ltd., 3, Broadway, Westminster, S.W., and at York.
John Davis & Son, Derby, Ltd., 12, All Saints Works, Derby, & 17, Victoria Street, Westminster, S.W.

BUYERS' GUIDE—continued.

- Syphons and Seltzogenes—**
Idris & Co., Ltd., Camden Town, London, N.W.
- Table Waters—**
Idris & Co., Ltd., Camden Town, London, N.W.
- Tank Makers—**
W. P. Butterfield's Ltd., Shipley, Yorks. Telegrams: "Tanks, Shipley." Telephone: 35 Shipley.
Harvey, G. A., & Co. (London), Ltd. (late of Lewisham), Greenwich Metal Works, Woolwich Road, London, S.E.
- Tanners' Emulsive Oils and Chrome Extracts—**
Earp, W. E., & Co., Preston Brook, near Warrington.
- Tanning Extracts and Materials—**
Humphreys, Percival, Ellis & Co., 90, Tooley Street, London, S.E. Telephone No. Hop 5277. Telegraphic Address: "Quebrach, London.
- Taps Manufacturers—**
The Prestwich Smallware Co., 25, George Street, Manchester. T. A.: "Smallwares," Manchester. T. N.: City, 3882.
- Tar Distillers—**
Brotherton & Co., Ltd., Leeds.
Grindley & Co., Ltd., Poplar, London, E. Tels.: "Resinous Pop. London."
Lord, J. E. C., Ship Canal Tar Works, Waste, Manchester.
- Tea Merchants—**
Brooke, Bond & Co., Ltd. (Foreign Dept.), Goulston Street, Aldgate East, London; also at Calcutta and Colombo. Original and packet teas of every description.
Tower Tea, Limited, 71, Eastcheap, London, E.C. Original, Blended and Packet Teas.
- Telegraph Engineers—**
Henley's, W. T., Telegraph Works Co., Ltd., London, E.C.
Hooper's Telegraph and India-rubber Works, Ltd., London, E.C.
- Telephones and Supplies—**
British L. M. Ericsson Manufacturing Co., Ltd., 4, Chancery Lane, London, W.C. Telephone: 5340 Holborn. Works: Beeston, Notts.
Peel-Conner Telephone Works, Ltd., Midland Bank Chambers, Queen Victoria Street, London, E.C. Works: Peel Works, Salford, Lancs.
Relay Automatic Telephone Co., Ltd., Marconi House, Strand, London, W.C.2. Automatic Telephone Switchboards.
- Telescope Manufacturers—**
Cooke, T., & Sons, Ltd., 3, Broadway, Westminster, S.W., and at York.
Ross' Optical Works, 3, North Side, Clapham Common, S.W.
- Tents and Marquees—**
Paget, R. G., & Son, Ltd., 48-50, Aldersgate Street, London, E.C. 1.
- Testing Machines—**
Denison, Saml., & Son, Ltd., Middlewood, Leeds. Vertical and Horizontal Testing Machines for hydraulic, belt and hand
- Textile Goods—**
Edwards Bros., Ormond Street, Liverpool. power.
- Thermit—**
Thermit, Ltd., 675, Commercial Road, London, E.
- Tiles, Tesselated and Glazed—**
Carter & Co., Ltd., Encaustic Tile Works, Poole.
- Tin Fall—**
Venesta, Ltd., 1, Great Tower Street, London, E.C. Plain, Coloured or Embossed Foils.
- Toolmakers for Small Wares and Fancy Trades—**
Simmons, Bernard R., 21, Vyse Street, Birmingham.
- Toy Manufacturers—**
Christie & Co., 41, Charterhouse Square, London, E.C. Toy Printing Outfits (Rubber Type), "John Bull."
Jullien, H. J., & Son, 24-26, Edgbaston Street, Birmingham. Toy Guns, Toy Scales, and Eskimo Dolls.
Roberts Bros., Glevum Works, Gloucester. Picture Cubes, Educational Pastimes, Indoor and Table Games, "Tiny Tots" series of Pastimes, and Plush Toys.

BUYERS' GUIDE—continued.

- Toy Manufacturers—continued.**
Sloan & Co., 2, King Street, Liverpool. Telephone Bank 8551. (Felt Doll and Animal.)
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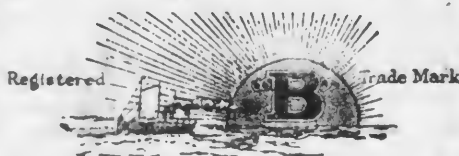
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