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THE  
**BOARD OF TRADE**  
  
**JOURNAL**  
AND  
**COMMERCIAL GAZETTE**

[REGISTERED AS A NEWSPAPER]

Vol. CI. (New Series.) No. 1138.]

SEPTEMBER 19th, 1918.

[Price Sixpence.]

SPECIAL CONTENTS.

ECONOMIC PROGRESS OF SOUTH AFRICA:  
H.M. TRADE COMMISSIONER'S REPORT FOR 1917.

—  
SOUTH AFRICA:  
STANDARDISATION OF MINING STORES.

—  
THE SOUTH PACIFIC ISLANDS:  
POPULATION AND LABOUR.

—  
REVIEW OF CANADIAN WAR FINANCE.

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## The Department of Overseas Trade (Development and Intelligence),

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### 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, was held in the Pennington Street premises of the London Docks which

were placed at the disposal of the Board of Trade by the Port of London Authority. It was opened on 11th March and closed on 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 circulating 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 (30, St. James's Street, London, S.W. 1), or through bodies affiliated to the latter.

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# The Board of Trade Journal AND COMMERCIAL GAZETTE.

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## The Board of Trade.

### THE NON-FERROUS METAL INDUSTRY ACT, 1918.

#### VALIDITY OF LICENCES.

The Board of Trade draw the attention of all companies, firms, and individuals holding licences under the Non-Ferrous Metal Industry Act to the fact that these licences do not dispense the holders from complying with the Regulations which have been made under the Defence of the Realm Act with respect to the sale or purchase of non-ferrous metals.

The necessary permits under those regulations must be obtained from the Ministry of Munitions in respect of any sales or purchases of non-ferrous metals in the same manner as before the licences under the Act were granted.

#### THIRTEENTH LIST OF LICENCES.

We give below the thirteenth list of firms, etc., licensed under this Act. Previous lists appeared in our issues of 30th May, 13th and 20th June, 4th, 11th, 18th, and 25th July, and 8th, 15th, 22nd, 29th August, and 5th September.

Notice is hereby given in accordance with Section 1, Sub-section 7, of the Non-Ferrous Metal Industry Act, 1918, and No. 11 of the Statutory Rules and Orders No. 265 of 1918 (Non-Ferrous Metal Industry), that Licences under the Non-Ferrous Metal Industry Act have been granted by the Board of Trade to the under-mentioned companies, firms, or individuals:—

- Anchor Cable Co., Ltd., The, Leigh, Lancashire  
 Appleton and Howard, Salisbury Street, St. Helens.  
 Aston, D., 36, Bastwick Street, Goswell Road, E.C. 1.  
 Blair, G., 11, Queen Street, Glasgow.  
 Bradley and Burch, Ltd., 5, Whittington Avenue, Leadenhall Street, E.C. 3.  
 British Phosphorised Metals Co., The, 159, Queen's Road, Sheffield.  
 Bruce, W. T., trading as W. T. Bruce and Co., 3, Lombard Court, E.C. 3.  
 Charles, W., 33, Glenalla Road, Llanelli.  
 Clemmons, A. J., trading as Midland Aluminium, 12, Great Francis Street, Birmingham.  
 Cox and Co., John, Leopold Foundry, Hick St., Birmingham.  
 Cox, Limited, Stephen, Gibb Street, Deritend, Birmingham.  
 Dalgetty and Co., Ltd., 45, Bishopsgate, E.C. 2.  
 Dodwell and Co., Ltd., 21, St. Mary Axe, E.C. 3.  
 Electrolytic Copper Co., Ltd., The, 4 and 6, Copthall Avenue, E.C. 2.  
 Erhardt and Co., Ltd., H., 9 and 10, Bond Court, Walbrook, E.C. 4.  
 Fletcher and Son, Ltd., W., 136, Fenchurch Street, E.C. 3.  
 Green, T., 67, New Street, Wednesfield.  
 Hammer and Co., 3, East India Avenue, Leadenhall Street, E.C. 3.  
 Hanson, Brown and Co., Ltd., Queen's Square, Middlesbrough.  
 Howard, A., 3, Broad Street Buildings, Liverpool Street, E.C. 2.  
 Jaeger Brothers, Ltd., Middlesbrough-on-Tees.  
 Jones and Co., S. F., 1, Cannon Street, Birmingham.  
 Kent Smith, Ltd., 459, Queen's Road, Sheffield.  
 Kift, A., trading as Kift and Co., 10, Philpot Lane, E.C. 3.  
 Llew. Daniel, E., Adelaide Chambers, Adelaide Street, Swansea.  
 Mansel, F. C. R. O., trading as C. O. Mansel and Co., Clive-land Street, Birmingham.  
 Mee, Billing and Partners, Ltd., 37, Lime Street, E.C. 3.  
 Morgan Bros., Victoria Works, Pontypridd.  
 Naylor, Benzon and Co., Ltd., 20, Abchurch Lane, E.C. 4.  
 Newton, F., trading as Fredk. Newton and Sons, 14, Horringford Road, Aigburth, Liverpool.  
 Payton, Ltd., Enrique, 14, St. Paul's Square, Birmingham.  
 Rowlands and Co., Ltd., T., Windsor Works, North Church Street, Sheffield.  
 Robertson, Jun., A., trading as Alex. Robertson and Co., 101, St. Vincent Street, Glasgow.  
 Shaw, Isaac, 41, High Street, Acton, Birmingham.

#### THE BOARD OF TRADE—continued.

- Shelley, H. J., trading as H. J. Shelley and Co., 31, Queen Victoria Street, E.C. 4.  
 Sinclair and Guest, 28-30, Lime Street, E.C. 3.  
 Singer and Sons, Ltd., J. W., Frome, Somerset.  
 Steel Manufacturers' Nickel Syndicate, Ltd., Vickers House, Broadway, Westminster, S.W. 1.  
 Stone and Co., Ltd., J., Deptford, S.E.  
 Taylor and Son, A., 47, Oswald Street, Glasgow.  
 Titley, J., trading as John Titley and Co., 12, Rumbold Place, Liverpool.  
 Turner and Co., W., Eyre Street, Sheffield.  
 Union Acid Co., Ltd., The, 17, Cooper Street, Manchester.  
 Watts, J. A., 75, Billiter Buildings, Billiter Street, E.C. 3.  
 While, Limited, George, Livery Street Casting Works, Birmingham.  
 Williams, H., trading as Williams and Foulds, Britannia Wharf, Watery Lane, Birmingham.  
 Wishart, W., 24, Mitchell Street, Kirkealdy.

#### HOUSEHOLD COAL.

##### LOW STOCKS: HIGHER PRICES.

The latest figures in possession of the Coal Controller regarding the stocks of house coal in certain parts of the country make it clear that supplies in hand are dangerously low, and that the utmost economy in the use of coal, coke, gas, and electric light is necessary in every household in the kingdom.

So far as London is concerned there were on the 31st August 182,000 tons of coal in stock. How short this is of actual requirements may be gathered from the fact that early in March at the end of last winter there were in stock 341,000 tons.

In Birmingham the stock on 2nd March of 5,563 tons had fallen to 2,086 tons by the end of August, and in Liverpool the stock on 2nd March of 9,573 had declined to 2,368 on 31st August.

This time last year most of the private cellars in this country were stocked with coal. This year, unfortunately, there is every reason to believe that a large proportion still remain to be filled. Last autumn was devoted mainly to accumulating stocks, so that they could be quickly available for the poor, and the scheme was quite successful.

On 16th September the delivery prices of household coal in the Metropolitan division increased by 1s. 6d. per ton. This included the usual winter increase in prices in accordance with the practice in London. There was no alteration in the delivery prices of gas, coke, or in the trolley prices of coal.

#### BRITISH MERCANTILE MARINE.

##### THE STANDARD UNIFORM.

The Board of Trade announce that it is an offence under the Defence of the Realm Regulations for any unauthorised person to wear the Standard Uniform for the British Mercantile Marine, or any uniform so nearly resembling it as to be calculated to deceive; or for any person falsely to represent himself to be a person entitled to wear the uniform.

The designs of the Standard Buttons and Cap Badge are registered under the Patents and Designs Act, 1907, and articles to which these designs are applied can only be manufactured and sold under licence granted by the registered proprietors, namely, the Board of Trade. Accordingly, all persons who desire to manufacture and sell the standard buttons and cap-badge should apply for a licence to the Assistant Secretary, Marine Department, Board of Trade, 7, Whitehall Gardens, London, S.W. 1.

The text of the Order-in-Council which authorised the Standard Uniform was published in full in last week's issue of the "Journal." Detailed particulars were therein given of the uniform, which has been approved by his Majesty the King.



THE BOARD OF TRADE—continued.

THE TRADE COMMISSIONER SERVICE.

VISIT OF H.M. TRADE COMMISSIONER (NEW ZEALAND) TO THE UNITED KINGDOM.

As announced in the "Journal" of last week, H.M. Trade Commissioner in New Zealand (Mr. R. W. Dalton) will pay an official visit to this country at an early date, to afford interested firms facilities for acquiring information in regard to their trade in the New Zealand market.

Mr. Dalton is expected to arrive about the middle of October, 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 his arrival. 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.

Attention is drawn to the fact that the exact date of the visit of Mr. Dalton to any particular centre cannot be definitely fixed until all applications from firms desiring interviews have been received. In order that appointments may be satisfactorily arranged, firms who may desire to have an interview with Mr. Dalton are requested to make their application *as soon as possible*. 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. 36,732/18) should be quoted.

OFFICIAL VISIT OF MR. WICKHAM, H.M. TRADE COMMISSIONER IN SOUTH AFRICA.

CONTINUATION OF TOUR.

With reference to the Notices in the "Board of Trade Journal" for 13th June last (p. 729), and p. 179 of 8th August, Mr. Wickham's official tour will be continued at the undermentioned industrial centres on the following dates:—

Liverpool	Sept.	18th-21st
Dublin	"	23rd
Londonderry	"	25th
Belfast	"	27th
Glasgow	"	30th-Oct. 5th
Edinburgh	Oct.	7th
Galashiels	"	8th
Newcastle-upon-Tyne	"	9-10th
Leeds	"	11-16th
Bradford	"	17-19th
Huddersfield	"	21st
Sheffield	"	22nd-25th
Derby	"	28th-29th
Nottingham	"	30th
Leicester	"	31-Nov. 6th
Northampton	Nov.	7th

Special Articles.

ECONOMIC PROGRESS OF SOUTH AFRICA IN 1917.

ANNUAL REPORT OF H.M. TRADE COMMISSIONER.

In his Report for 1917 (Cd. 9155, price 3d.) on the Trade of South Africa, Mr. W. G. Wickham, H.M. Trade Commissioner in South Africa, states that, from the point of view of industrial development, the year will be looked back to as the date when the whole question was first taken seriously as a national problem and not one to be left solely to provinces, towns, or individuals. The following are the chief points which make this year notable in respect of industry in the Union:—

- (1) The first census of industrial production;
- (2) The formation of a Federation of Industries in which are associated all the Provincial Manufacturers' Associations and the affiliation of this Federation to the British Empire Producers' Association;
- (3) The formation of the Industrial Development Company, Limited, to provide the practical assistance in the form of funds for new industrial enterprise, this supplementing the investigation, supervision, and guidance provided by
- (4) the now thoroughly organised Industries Section of the Department of Mines and Industries with its advisory Council of Industry, Statistical Committee and Scientific Advisory Board;
- (5) The first publication of the official monthly "Journal of Industries"; and
- (6) The flotation of companies to establish vitally important primary industries, notably the production of iron.

DEVELOPMENT OF INDUSTRIES.

Besides the two companies which are erecting blast furnaces, the one at Pretoria and the other at Vereeniging, the following are among the more important new industries which have recently been, or are on the point of being, established in the Union:—

Manufacture of: Carborundum; calcium carbide; alcohol motor fuel (in addition to methylated spirit and industrial alcohol from sugar-cane refuse); asbestos sheet and goods; casting shoes and dies for gold mine stamp battery (of steel from electric furnaces); paint and distemper from local materials; maize starch; lead shot (in addition to sheet and pipe already manufactured); sauces and condiments; stearine; sulphate of ammonia; polishes, shoe and floor; toys—chiefly teddy bears, dolls and wooden toys; wattle bark extract for tanning (an industry previously confined to Germany); it is claimed that valuable vegetable dyes are also obtainable from the same material; refining of arsenic, with the probable future addition of its most useful compounds; refining of antimony, pure and oxide; tin smelting; recovery of tin by detinning scrap; lead corroding for white and red lead; glass-bottle blowing (previously established but closed down); chicory, local cultivation and preparation; meat canning. (There is, apparently, at present no canning of ox and sheep tongues, but no doubt this will follow.)

PROPOSED INDUSTRIES.

The following are among industries proposed and likely to be established:—

Acetone; condensed milk; paper; tartaric acid. Necessities, the manufacture of which, while not begun this year, is yet of recent date and is being expanded, are: Cocoa; oxygen; rope twine and packings; rubber goods (from raw rubber).

In addition, salt is being refined from local salt pans. Carbonate of soda deposits, chrome ore, magnesite and mica are all being worked and may lead to further local industries, as also the local pyrites to the production of sulphur.

The Industrial Development Company, Limited, is an indication of confidence in the future. It indicates that there is no longer that hesitation and uncertainty which delayed industrial initiative in the first years of the war. This concern has not only been successfully launched but it has already taken a lead in financing some of the new and promising industries included in the list given above.

AGRICULTURE.

Although the year is notable for its industrial developments, agriculture has, nevertheless, been on a scale which in other years would possibly have aroused more

## SPECIAL ARTICLES—continued.

comment. Agriculture has had to make the best of one very serious deprivation. Basic slag has been practically unprocurable all the year, and superphosphates, which in the earlier part of the year could be purchased from Japan, were afterwards listed as prohibited exports in that country. Sulphate of ammonia, which is now being manufactured in Natal, is, apparently, not suited to South African soils and is being supplied to the sugar growers in the neighbouring island of Mauritius, supplies of this necessity from Europe having been shut off.

Public attention and scientific research are alike concentrated on the possibility of making South Africa more independent of outside sources in respect of phosphatic manures. It is, no doubt, fully realised that if the present-day level of exports of grain and meat is maintained, and, as may be anticipated, increased, the need for phosphates to replace what is taken not only out of the soil but out of the country is going to increase enormously. Present-day consumption is far below that, for instance, of New Zealand. If the recent finds of rock phosphate prove reasonably rich it may be anticipated that the small local superphosphate industry will expand and that the manufacture of sulphuric acid in the Union will also be further developed.

## AGRICULTURAL PRODUCE EXPORT ACT.

Included in a list of legislative enactments affecting trade is the Agricultural Produce Export Act. This was opposed as infringing the Municipalities' monopoly of the slaughtering business. From the point of view of local consumption and public health this monopoly has no doubt been wholesome. In certain parts of the Union equal public supervision of the milk supply may be said to be an urgent need. Nevertheless, the rapidly expanding export trade could hardly be regarded as the concern of municipalities and, as a result, opposition to legislation was withdrawn.

The effect of the latitude given by the Act has been most pronounced, as in the six months since the Parliamentary Session ended several very considerable abattoir and cold-storage enterprises have been floated successfully, most of these being co-operative ventures.

In Rhodesia, the demand from overseas has similarly stimulated enterprise and a meat-canning factory is to be added to new abattoirs and cold stores for export. Attention, both in the Union and Rhodesia, is being directed to the world demand for pigs. So far, while a stimulus has been given to the breeding, factories are concentrating on bacon and ham curing.

## HEAVY RAINFALL AND FLOODS.

The year 1917 will probably be as memorable for its rainfall and floods as 1916 was for the severe drought. Few, if any, districts have not had an unusually plentiful supply of rain, and very many have had too much. Natal has had two serious visitations, the latter amounting to a grave disaster, involving as it did considerable loss of life, the cutting off of water supply from Durban for several weeks, and serious damage to crops, particularly to sugar cane. The Vaal river begins the new year with a second record-breaking flood, and practically every one of the major waterways in the Union has at least once been in high flood. From the published military reports it would appear that the abnormal precipitation has been general right up the East Coast to the equator. Even Cape Town's serious difficulties have been momentarily lessened by well distributed rains on into the summer.

## MUNICIPAL DEVELOPMENT.

Cape Town, after a long and animated debate, has been committed by the ratepayers to a definite scheme for providing an adequate supply of water. The choice lay between two alternatives, both at a considerable distance from the Cape Peninsula, the one providing a very much larger supply of rather better water, but the other, the Steenbras scheme, has been preferred as adequate and at the same time very much less costly and capable of being brought into operation in a much shorter time. That time will depend on the facilities allowed for shipping the pipes from England. The total cost allowed for is £850,000. Provision for the cost can be made as the money is needed. An outlay of nearly £250,000, in addition, is required for extending the electricity supply and for clearing away slums and building workmen's dwellings.

The important Vaal river barrage project of the Rand Water Board is well under way so far as excavation of foundations for the barrage goes, but the carrying out of the scheme is delayed until the valves and sluice pumps and pipes are procurable.

## SPECIAL ARTICLES—continued.

East London and Grahamstown have alike determined on water schemes which, when carried out, will relieve these towns from embarrassment and make possible further engineering development.

In the case of electricity, normal expansion has had to stop, all the more important municipal generating stations being already fully loaded and some actually overloaded, and additional plant on order being unprocurable or, at least, delayed. The same consideration applies to the telephone service, for which new instruments are unobtainable. Copper cable has, of course, been on the list of prohibited exports from the United Kingdom for some time, and this fact has given the Japanese a chance of having their cable tested in use by the Post and Telegraph Department, Mines and Public bodies. The accumulation of overdue orders and of postponed development in regard to electricity, water supply, and sanitation will probably, by the time normal trade conditions are once more in sight, represent a very large amount of business. This is equally true of mining, since, while production is being pressed on, both development work and the opening up of new enterprises are being largely postponed.

## MINING.

This industry, of all the industries of the country, has, so far as production is concerned, been most nearly normal. With the one exception of diamonds, practically all the mineral products have been not only in demand but necessities of the Empire in war time even more than in peace. Diamonds, though at the other extreme as regards being war necessities, serve a very useful purpose as a commodity of maximum value with minimum bulk saleable to America to help the balance of trade. Except from the shareholders' point of view, no other very obvious national purpose is served, since, as indicated below, there was no surplus of labour to be absorbed.

The production, on the other hand, of gold, coal, copper, tin, lead, chrome, etc., has been encouraged in every possible way. Even agriculture, owing to the dearth of fertilisers, can hardly be said to have fared so well in respect of facilities for obtaining necessary supplies, though, of course, both in respect of prices offered and freight facilities provided, everything possible has been done in that direction also.

The past year has, however, witnessed changes in connection with mining which commercially amount to a revolution. These changes have been brought about, both in the case of coal and gold, in the interests of economy, that affecting coal being a matter of organisation for disposal of output, and that applying to gold being concerned solely with the purchase of supplies.

## COAL.

The change relating to the coal industry consists in an agreement to group the output of the Natal coalfields by qualities. Against a contract for a specified coal, any other coal in the same quality group can be tendered. Previously to this pool, a steamer might be held up waiting for a specific coal for which trucks could not be supplied owing to the congestion of trucks in Durban waiting for steamers which had not yet arrived. This difficulty has now been alleviated; and while no doubt the new arrangement—on which the Mining Companies and the Department of Railways and Harbours are to be congratulated—will produce the economy of trucks which was the primary consideration, there can equally be no doubt that it will also be found to be a great economy to the producing companies as reducing the wasteful expenditure on demurrage to a minimum and increasing the quantity of coal for which they can get transportation from their pits to the coast.

## GOLD.

The change in the system of buying supplies for the gold mines is also nominally a temporary expedient due to war exigencies. The old system involved the stocking in the hands of merchants and manufacturers' agents of supplies of every class of goods required by mines, other than special machinery and apparatus of which the precise specification was not fixed and known beforehand. It involved, in addition, every mining company or, at the very least, every group of mines, carrying stocks of spares and supplies to a considerable value. Individually, no doubt, these deposits of goods did not amount to very much and did not seem extravagant reserves against requirements. In the aggregate, and particularly when swollen by the very natural anxiety both of mine engineers and storekeepers and of suppliers to be on the safe side in case of abnormal delay in replacements from overseas or even prohibition of export, the stocks held on the Witwatersrand amounted to a very large quantity and value.

SPECIAL ARTICLES—continued.

The certificate of indents by the Buyers' Committee, which had been in force since the early months of the war, had not involved any pooling of ideas as to what was necessary. It might, therefore, happen that every individual concerned might with perfect honesty and good faith be requisitioning stock of the same item at the same time; and, as a result, it did actually come about that in some lines the stocks on the mines and in merchants' hands far exceeded the needs of the Rand taken as a whole. The very large figures shown in balance sheets by company after company as representing stocks in hand, called particular attention to the absence of system and lack of economy involved; and, seeing that a large proportion of the goods in question were of a kind the shipment of which was only justified by the necessity of keeping the mines going, and that they were in inadequate supply in the United Kingdom for other war purposes, urgent representations seemed called for to bring about a modification of the system.

CENTRAL BUYERS' COMMITTEE.

The first step necessary was to centralise the whole supply business in the hands of one buyer, and the necessary preliminary to further buying was a gigantic stocktaking, returns being called for and collated of all mine supplies at the mines, in the hands of merchants, and on the water. Further, returns of the normal consumption of all stores having been similarly collated, it was possible to begin reducing excess stock to the prescribed limit of six months' supply. Until that limit is reached no orders may be placed overseas.

The result is an organisation of buying for the mines hardly even dreamed of as possible in pre-war days—the whole buying from overseas being focussed in one buyer's hands.

How far the present system is likely to be permanent is a question depending on intricate considerations. At least it is a possibility which must be faced with serious thought. If it remains as a permanent legacy of the war it cannot but produce profound modifications in the whole business organisation built up for supplying the requirements of the mines.

Side by side with this change in buying and the carrying of stocks of imported goods, local manufacture has been making very notable strides, also largely as the result of the war. If the local production of pig iron proves a success, it is impossible to ignore the potentialities which stare one in the face. Centralised in an area of, say, 100 square miles, is a huge market for all iron and steel products, situated 500 miles inland at an elevation which makes haulage from the coast costly, and amply provided with exceedingly cheap coal, with lime and with high-grade cement.

Either or both of these factors, centralised buying and local manufacture, must exercise a profound effect on the whole supplying organisation which has grown up and crystallised in the pre-war time.

NATIVE LABOUR.

The falling tendency in the supply of native labour marked in 1916 has been continued throughout 1917. While December, 1916, showed a drop of 15,000 from a total of over 210,000 employed in December, 1915, the position at the end of the year under review shows a further drop of 25,000 to the level of January, 1915. The shortage of native labour on many mines is reported as most acute.

There is also a shortage of skilled white labour, but the causes are regarded as only temporary.

IMPORT TRADE.

The following table, which may serve as a framework, shows the value of the imports of general merchandise (excluding Government stores and specie) into the Union of South Africa during the undermentioned years:

Principal Countries of Origin.	1917.	1916.	1915.	1914.	1913.
	£	£	£	£	£
Total Imports	34,750,782	38,759,562	29,208,689	31,322,590	38,526,381
Share of	per cent.	per cent.	per cent.	per cent.	per cent.
United Kingdom	52.46	58.68	58.43	56.64	54.43
India	6.18	8.76	4.32	3.19	2.82
Australia	3.64	3.35	1.65	5.00	5.21
Canada	2.75	2.23	3.35	2.49	2.22
Principal					
Total British Empire	66.65	69.37	68.97	68.95	66.28
Germany			0.39	7.60	8.80
United States	17.92	15.67	15.10	9.68	9.52
Japan	2.10	1.40	0.76	0.35	0.28

This table serves to indicate the fact, which was hardly sufficiently emphasised or even recognised before the war, and which for other reasons seems to be lost sight of even now, that, commercially, the United States is the chief rival of the United Kingdom for the trade of South Africa.

SPECIAL ARTICLES—continued

AMERICA THE UNITED KINGDOM'S CHIEF COMPETITOR.

Germany had, it is true, secured a share of the trade in South Africa more nearly equal to that of the United States than in the other Dominions, and, certainly, it must be admitted that this share was not inflated as that of the United States is by natural products and semi-manufactured commodities. Nevertheless, it is as foolish to minimise the proportion of manufactured goods included in America's 9½ per cent. share of South Africa's imports for 1913 as it is to overlook the overwhelmingly greater resources which lie behind America's export trade than those of any other economic rival of the United Kingdom.

To those who have in the past been endeavouring to find a market in the United States for their manufactures, it has, of course, been obvious not only that most branches of manufacture were being carried on in the United States, but that behind that tariff wall lay an individual consuming market probably the largest economic unit in the world; a market as large as the United Kingdom and Germany combined, and with probably a much greater consuming power owing to the higher general standard of living. In view of the general recognition in these days of the interdependence of production cost and scale of production, to ignore America's domestic manufactures and to point scornfully at the smallness of her pre-war exports of manufactured goods was an economic error fully as great and misleading as the surprise, so often expressed by another school of thought, at the rapidity of expansion of export trade from the United States.

Given the huge home market and boundless natural resources of the United States, the expansion of America's export trade in all directions and in all classes of goods is a foregone conclusion. The United Kingdom can, no doubt, retain her share, if not her proportion, of world trade by strengthening her organisation and improving her methods; but it is not reasonable to expect her, indefinitely, to limit and outdistance American export trade, or, for the failure to do so, to blame the British manufacturers, officials, or other persons.

The South African import returns for 1917 show that the United States supplied goods to a value of 6.2 million pounds, as against 6.1 million pounds, 4.4 million pounds, 3 million pounds, and 3.7 million pounds in the previous four years, respectively. In view of the enormous rise in prices generally, this expansion is not so great perhaps in reality as in appearance. At the same time, a close analysis shows that the increased share of imports is very much more important than is indicated even by the increased percentage.

Of the manufactured goods in which gains are to be noted, the most important group is "Iron and Steel." The value of the imports of this group from the United States increased by £250,000, primarily, no doubt, as a result of the war. To this amount must be added £45,000 increase in fencing and baling wire and £13,000 in railway material, South Africa having had to depend almost entirely on the United States both for light railway material and wire, instead of Germany, which had an important share of both trades. In motor bicycles the increase on the year is £19,000; but this is part of a continuous inroad into a virtual monopoly of the United Kingdom. Out of an importation of £164,000 in 1914, the United States only supplied motor bicycles, tyres and parts to the value of £13,000. In 1917 her share of the importation of £136,464 of motor bicycles and parts (excluding tyres) is £73,509.

EXPORT TRADE.

The following is a summary of the chief export lines (except gold and ships' stores), which are the produce of South Africa, for the year 1917:—

Principal Articles.	Value of Exports of South African Produce, 1917.	
	£	
Diamonds	6,097,006	
Coal (Cargo)	320,801*	
Copper (ore and regulus)	976,422	
Other minerals	402,178	
Wool and hair	9,062,916	
Hides and skins	2,637,735	
Maize and other cereals (except farinaceous preparations)	2,229,399	
Beef and veal	1,043,854	
Feathers, ostrich	175,019	
Butter	196,920	
Blasting compounds	525,666	
Wattle bark and extract	273,502	
Other	1,851,495	
Total exports of South African produce*	25,791,923	

\*Excluding ships' stores, valued at £2,979,375, of which bunker coal accounted for £2,713,206.



## SPECIAL ARTICLES—continued.

Turning to the destination of exports from the Union of South African produce we find that the purchases of Japan were valued at £2,842,000, all of which, except £30,000, represented wool. It is understood that Japanese buyers confined their attention exclusively to high grade wool.

The United States purchased wool to a value of £4,500,000 and also Angora hair to a value of £131,000. About half the small export of ostrich feathers, and hides and skins to the value of £796,000, also went to the United States—the balance, representing sundries, being only slightly over £80,000.

## ENTREPOT TRADE.

Exports from the Union are complicated to an increasing degree by the fact that, while local produce and manufacturers are finding a widening market in the neighbouring Colonies and Protectorates, both British and foreign, as well as in Rhodesia, the entrepôt trade for oversea products imported and re-sold by merchants in the Union for those same destinations is growing simultaneously. The following table gives some idea of the magnitude of this trade, though it should be noted that the situation created by the war, the continuation of the campaign in East Africa through 1917, the dislocation of shipping and other factors have helped to stimulate it.

It must not be overlooked that exact accuracy as to the proportion of goods retained for consumption or re-shipped is not possible without minute inter-relating of the statistics of the Union, Rhodesia, Mozambique and the Congo, owing to the complications caused by transference of goods for N. Rhodesia and the Congo, alternatively, through the Union and S. Rhodesia or through Mozambique and S. Rhodesia.

Exports from the Union of South Africa to various neighbouring countries. (1)	1917.		
	South African Produce. (2)	Re-exports. (3)	Total. (4)
	£	£	£
To Rhodesia (Northern and Southern) .. .. .	655,000	932,000	1,587,000
To British E. and S.W. Africa and Neighbouring Colonies and Protectorates .. .. .	616,000	763,000	1,379,000
To Foreign Colonial Possessions in South Africa .. .. .	421,000	638,000	1,059,000
<b>Grand Total</b> .. .. .	<b>1,692,000</b>	<b>2,333,000</b>	<b>4,025,000</b>

The figures in the third column represent, of course, the deduction which should be made from the total imports into the Union of South Africa for the sake of accuracy in ascertaining the purchasing power of the Union. Those in the second column constitute a particularly interesting section of the Union exports of South African produce as to a very large extent they represent goods manufactured in the Union. Union manufacturers may possibly have certain advantages in respect of freights, proximity and other facilities of distribution, particularly as regards Rhodesia and the Katanga district of the Belgian Congo; but none the less these exports do represent sales in the open market in free competition with foreign sources of supply, including the older and more highly organised manufacturing countries. To a large extent, also, they represent an excess of manufacture in the Union over the quantity needed for local consumption, and may be taken, therefore, to some degree as an index of the extent to which, in these times, Union manufacturers have attained the command of their domestic market.

## INDUSTRIAL PRODUCTION

The Census of Industries which was taken during the year reveals creditable progress. Turning to the figures of output by classes and industries, they are found to have a very wide range, but comparatively few have attained to great importance.

A very incorrect inference might be drawn from the fact that as an easy first among industries we find Engineering with an output of £7 millions. From a study of other tables supplied we learn that nearly £4 millions of this output is contributed by the Government railway shops, and a further £2½ millions by the engineering shops of the Mines, leaving only £500,000 as the output of all other engineering works in the Union.

## OUTPUT OF VARIOUS GROUPS.

With an output of £5½ millions comes flour milling. Sugar (raw and refined) figures third with £3 millions. Another table shows the actual output of raw sugar as worth £1,875,000. Biscuit making, even before the war, was well

## SPECIAL ARTICLES—continued.

established, and at present the local industry is supplying all local requirements. It is, however, in the census returns merged with cake and bread making in a combined output valued at £2 millions. It is, therefore, not possible to make any comparison with the imports or estimate of consumption.

The only other industrial groups returning an output of over £2 millions are building and contracting, and electricity and gas generation and distribution. Both of these being of necessity local work, hardly call for comment. The use of coal gas in the Union is insignificant either for internal combustion engines, for cooking or for lighting. Where it is used the cost is exceedingly high.

With an output of more than one, but under two, million pounds, we find five industries of which the two larger are perhaps also of the greatest importance. These are soap and candle and explosive manufacturers. These are, of course, intimately connected and interdependent through the by-product glycerine. The export statistics for 1917 show that a very large quantity of "blasting compounds" has been shipped to Europe, but in normal times the works depend almost entirely on the mines as their market. The output of the two match factories is merged with that of the three explosive works.

Of the remaining three industries showing an output of over £1 million, namely, printing, brewing, and tobacco, none seems to call for special comment.

The eleven groups and industries referred to so far account for £29½ millions, or practically three-quarters of the total gross output of all productive industries. Following these industries come a series of small industries, of which 14, having each an output over £300,000, produce an aggregate of £6½ millions, and the next 16 industries account for a further combined total of £2½ millions. Finally, 31 minor industries and a group called "miscellaneous" make up the £1,400,000, which completes the whole, returned as £40,434,832.

## COMPETING IMPORTS.

From the point of view of those competing directly with local factories as oversea manufacturers of similar products it is desirable to obtain some idea of the size of the market and amount of consumption of each commodity. It is, however, only possible to do this at present in a limited number of cases, given below, of imports and of local production. The details of production are not shown separately. Furthermore, it must be remembered that the figures given as the value of imports represent the oversea home-market value (including carriage to the port of shipment and the cost of packing and packages), which in these days of war freights, are vastly less than the landed cost which would be the true basis for comparison with a return based on local factory costs.

Goods.	Value of Local Production, Year 1915-16. £	Value of Import, 1916. £
Explosives (a) .. .. .	1,884,140	1,559
Matches .. .. .	1,735,389	1,855
Soap and candles .. .. .	475,862	97,012
Leather .. .. .	431,344	120,203
Confectionery .. .. .	504,000	313,623
Boots and shoes .. .. .	260,027	1,486,102
Harness and saddlery .. .. .	828,615	7,323
Tailoring .. .. .	174,728	(b) 4,011,553
Dressmaking and millinery .. .. .	(c) 65,986	288,625
Hats, caps, hosiery and other clothing .. .. .	597,085	20,092
Coach and waggons .. .. .	270,129	16,743
Cement .. .. .	444,530	161,599
Furniture .. .. .	156,541	20,015
Tarpaulins, tents and sails .. .. .	131,206	169,152
Bacon and Hams .. .. .	607,367	114,687
Butter and cheese (a) .. .. .	318,265	17,619
Jams (a) .. .. .		

(a) The exports from the Union (South African produce) of blasting compounds were valued at £528,535, of butter and cheese at £111,478, and of jams and jellies at £33,069 in 1916.

(b) Apparel and slops, haberdashery and millinery

(c) Hats and caps only.

## SUGGESTIONS TO MANUFACTURERS.

The restriction of British commercial manufacturing and limitation of export, particularly in lines which have in the past been specially regarded as British preserves, have given golden opportunities to commercial rivals to introduce their goods in this market, to obtain a trial of them in spite of the prejudices and conservatism of the consumer, and to obtain much valuable information



**SPECIAL ARTICLES—continued.**

as to the precise needs of the market and how such goods should be placed on the market, advertised, and distributed.

**SELLING ORGANISATION.**

It is for this reason that firms which have through war necessities lost part or all of their normal trade with South Africa should in proportion as they have lost trade increase their preparations for after war business by strengthening and improving their selling organisation. They should satisfy themselves that for their particular class of goods they have the best system of distribution, whether an agent working on a commission basis, a salaried representative, a purchasing sole agent, or no agent at all.

Manufacturers who have a new product to put on the market after the war or who, not having previously been represented in the South African market, consider that through an agent they could do improved business should take early steps to conclude arrangements for representation. Those firms who have agency arrangements which have proved satisfactory in the past should avoid any possible risk of alienating their agent or dispersing their organisation.

That the question of oversea selling organisation and the study of the most economical and effective methods of distribution are of vital importance can hardly be gainsaid. It was by efficient distribution quite as much as by organisation of manufacture that Germany attained to success in the South African market. And the United States, whose share of the South African import trade is now over one-sixth has, during the past three years, spared no trouble or expense in the same direction. That share represents trade done, but it does not indicate the extent to which plans for the future have been laid or selling organisations prepared for future operation. Whatever increase of efficiency in manufacturing we may have learnt during war time we have, nevertheless, to have also efficient distribution or we shall be unable to regain the trade unavoidably lost during the war or obtain our right share of the accumulating suspense orders which will have to be placed as soon as peace is in sight.

In connection with the study of distribution it cannot be too often emphasised that the manufacturer must concern himself with his goods until they reach the consumer. There may be economy in the employment even of a multiplicity of highly specialised middlemen. But it is often forgotten that unless middlemen are bound to the handling of particular makes of goods by specific agency contracts they cannot be expected to have any partiality for one make over another, except on the sole ground that it is more readily and more profitably saleable.

**CATALOGUES.**

Another matter connected with distribution which needs some care is the printing of prices on goods and in catalogues. No doubt this is sometimes done advisedly and after full consideration and consultation. On the other hand, it is also done by oversight or through lack of consideration for its effect in embarrassing the distribution. It may safely be laid down as a general rule that, for export, retail prices should never be marked on goods prior to shipment unless—

- (a) at the request of, or at least with the consent of, the oversea importer, or
- (b) as a matter of deliberate policy matured with full knowledge of local conditions and local selling expenses with a view to controlling prices in the interests of increased turnover.

It must always be remembered that in sparsely populated areas of large countries the cost of distribution is not comparable with the cost of distribution in older countries. It should not be taken for granted that retail or wholesale margins of profits are extortionate without close study of local conditions.

**MACHINERY TENDERS.**

Referring to the very important issue of whether specialisation on one class of machine results in a more perfect product for particular purposes than the product of a works specialising on, say, cement-making plant and confining attention entirely to that particular purpose for each particular part of the complete plant. H.M. Trade Commissioner calls attention to the need for considering the difficulty involved in selling overseas when no one of the makers of plant is in a position to draw up a specification or working drawings of a complete plant.

It is all very well as regards the home market to rely on getting orders for individual machines or apparatus to take their place in existing factories and works, or to depend on a consulting engineer to do the assembling of ten or a dozen

**SPECIAL ARTICLES—continued.**

items into a complete specification. It is, however, very far from being an ideal system for oversea business, and very much business has gone to foreign countries just for the reason that manufacturers in so many lines do not profess to know about the manufacturing system as a whole for which they want to supply one part of the plant. In many instances it is almost impossible to arrange adequate representation, or even to interest a representative.

The advantages of specialisation on, say, vacuum pans, or drying machinery, may be very great, but the drawbacks are also of sufficient importance to merit study by engineering Associations in order to obviate these. Some development of organisation seems to be called for. Possibly firms making pumps, air compressors and machinery could, in relation to each of the various purposes for which their products are used, arrange small combinations of the makers of all different items going to make up a complete plant with a joint drawing office and selling organisation. Possibly firms of structural engineers who already undertake much work of assembling could cover the whole ground of industrial plant more completely and so fill the gap. That there is a gap, anyone who looks into the matter cannot seriously doubt.

**THE SOUTH PACIFIC ISLANDS.**

**POPULATION AND LABOUR.**

Witnesses before the Inter-State Commission of Australia were practically unanimous in asserting that the most acute difficulty at present influencing the industrial development of the Islands is the insufficiency of labour. This shortage, it was claimed, would be, unless remedied, an insuperable hindrance to progress. It is obvious, apart from any other consideration, that climatic conditions eliminated any possibility of utilising white labour, even if it were available. It was asserted by several witnesses that, whilst the Germans were permitted by treaty to recruit labour in the British Solomons, the planters in the latter territory were not allowed to exercise similar privileges in German New Guinea or the Bismarck Archipelago. The Convention, dated 14th November, 1899, made between Great Britain and Germany for the settlement of the Samoan and other questions, was quoted in support of this contention. The Convention provides:—"It is also understood that the stipulation of the Declaration between the two Governments, signed at Berlin on the 10th April, 1886, respecting freedom of commerce in the Western Pacific, apply to the islands mentioned in the aforesaid Convention. It is similarly understood that the arrangements at present in force as to the engagement of labourers by Germans in the Solomon Islands permit Germans to engage those labourers on the same conditions as those which are, or which shall be, imposed on British subjects non-resident in those islands." The labour question is undoubtedly a matter of supreme importance. Hitherto the chief sources of labour for the production of copra have been the islands themselves. To supplement these, Indians, Chinese, and Javanese have been suggested.

In order to obtain a clear view of the possibilities of future development, each of these classes of labour will be considered and dealt with later in the above order.

**THE NATIVE POPULATION.**

The native population is not ascertainable with any reasonable degree of accuracy. The official estimates, which represent only a rough approximation, are as follows:—

Possessions.	Estimated Total No.
<i>British—</i>	
Papua .....	250,000
Solomon Islands .....	150,000
Fiji .....	92,000
Gilbert and Ellice Group .....	30,000
Tonga .....	23,000
Cook Islands .....	12,000
	557,000

## SPECIAL ARTICLES—continued

<i>German—</i>	
Kaiser Wilhelm's Land .....	531,000
Bismarck Archipelago .....	188,000
Caroline, Pelew and Marianne Is. ....	55,000
Samoa .....	35,000
Marshall Islands .....	15,000
	824,000
<i>French—</i>	
New Caledonia .....	28,000
Tahiti, Society, Marquesas, Low Archipelago, etc. ....	26,000
	54,000
<i>French and British—</i>	
New Hebrides .....	70,000
<i>United States—</i>	
Samoa Islands .....	9,000
	9,000
Total .....	1,514,000

No reliable figures are obtainable as to the total area under cultivation throughout the various groups of islands, but from various sources it is roughly estimated that there are about 200,000 acres of coconut plantations. At the present time these are cultivated by native labour, and, estimating one labourer to each 5 acres, it would appear that about 40,000 natives are at present employed in this branch of production. This represents 2.64 per cent. of the total estimated native population, or approximately 8 per cent., if the adult male population is alone considered.

There are over 50,000 Indians in Fiji—principally in sugar cane cultivation—and in Fiji and in other islands about 4,000 Chinese, but they would not appreciably affect the above figures.

It will be noted that the Germans, either by good fortune or intentionally, have settlements in which the native population is most prolific. Their possessions account for more than one half of the total native population of the South Pacific Islands.

It would appear from the above figures that, provided labour were readily obtainable, the native population is sufficient for the purpose of meeting all reasonable labour requirements of the planters for a considerable time to come.

Owing, however, to the absence, with rare exceptions, of any stress on the means of existence, and that the fertile lands and seas provide in abundance the modest requirements of these native races, they naturally display no general inclination for anything in the shape of sustained labour. In addition to these features, the prevailing communal custom by which all property is shared in common by the members of the community tends to discourage, if it does not entirely destroy, the incentive for sustained individual effort. The worker cannot retain the reward of his industry. Upon returning to his island after a two or three years' engagement, his earnings—whether in cash or goods—no longer remain in his sole possession; they are claimed and shared in by his friends, relatives, and fellow tribesmen. Notwithstanding the inducements to remain idle, a considerable number of natives agree to serve as labourers. It is said that some of them love adventure, and for that reason prefer to engage in work on islands at some distance from their homes. The evidence tended to show that the system of recruiting, as well as the treatment of the natives, is under proper official control, and that provision is made for reparation in the event of their ill-treatment. Before a planter may start the recruits at work, he must take them before the Government agent, where the agreement is read and explained to the natives in Pidgin-English, and every effort, it seems, is made to enable them to thoroughly understand the conditions of their employment.

The usual wages paid are 10s. per month, which must be paid in cash, coin being the usual currency of the islands. The men also receive board and rations, which are regulated by governmental control. It was asserted that any increase in wages would not benefit the natives, since they have little idea of the value of money, and usually squander what they receive on

## SPECIAL ARTICLES—continued.

useless articles, the personal possession of which, as already explained, they lose so soon as they return to their own island.

Under their present conditions of living and their long-established customs, it does not appear that the natives can be relied upon as a sufficient source of labour supply. Various suggestions were made with a view to aiding planters to draw upon the islands to a greater extent for labour than in the past. Certain witnesses considered, if native recruits were accompanied by their wives and children, it would be attended with good results; others considered that the presence of the women would lead to trouble.

Though there are many native labourers and cultivators in the South Pacific Islands, the outstanding feature in connection with the present discussion is that the natives generally should be made capable of work and sustained effort. If the native can be converted to labour, his conditions of life will vastly improve and he will survive; otherwise he must certainly perish. The type of civilisation meted out to the native of the Pacific has been largely of a character not only altogether unsuitable for, but in many respects fatal to, his well-being. This question of converting the native into a worker is inseparably associated with the development of island industry, and it is satisfactory to anticipate, in view of what has already been accomplished in the South Pacific, that with wise provision and control the best interests of the natives may be conserved with advantage rather than injury to economic progress.

Labour difficulties somewhat similar to those of the South Pacific Islands were met with in the efforts to establish cotton cultivation in British West Africa, and in British East and South-East Africa, and it is interesting to note they are being successfully overcome by the adoption of similar methods to those suggested above.

What may be done by wise and sympathetic Governments towards improving conditions of the native races, and by diverting their energies towards useful and peaceful occupations, is in course of demonstration by the present administration of British Papua. The natives of this territory and adjacent islands without doubt presented the most unpromising material for experiments of this character. From the times when the first Portuguese and Dutch navigators visited these islands, the natives were looked upon as amongst the most bloodthirsty and intractable savages. Whilst no definite conclusions can be drawn from the experience of the Papuan Administration, the success so far attained in promoting coconut planting by the natives is very encouraging, and it at least suggests that the experiment is worthy of imitation elsewhere in the islands, since it may possibly be found to be a valuable aid in correcting the prevailing indolence and deterioration of the natives.

## THE INCREASE OF NATIVE POPULATION

It is too often assumed, state the Commission, that the contact with civilisation of races such as the Polynesian and Melanesian races means inevitable, even if postponed, extinction. This is by no means the case. In the past the vices and diseases of the white man have wrought havoc amongst the islanders, but the generation of unscrupulous "Beach-combers" and "blackbirders," to whom the introduction of such mischiefs were mainly due, has passed away. Nor is there any reason why such experiences as that of the wiping out of one-third of the population of Fiji by measles should be repeated. One result, and an early result of the inauguration of some central governmental control of the islands, should be that the Government should take up as a prime necessity the conservation and increase of the native population. It appears that abortion and infanticide are very widespread in the islands. The missionaries have done splendid work in weaning the natives from practices such as these, and in this, as well as in other matters,

SPECIAL ARTICLES—*continued.*

have hitherto been the chief, if not the only truly, civilizing force at work in these regions. Their work has been done from the highest of motives, and is carried on in complete accord with the various British administrations.

But now that the Pacific is becoming one broad field, it is necessary, say the Commission, for its British rulers to promote the increase of native population as their first duty, the successful discharge of which will bring in its train most of the trade objectives of British enterprise. The medical service of the islands should be greatly increased, the training of the natives in practical work as well as in book lessons, the suppression of abortionists, and the encouragement of individual property should all be part of a definite programme. Where past adjustments between the natives and the Government have resulted, as in Fiji, in the creation of native landlords, measures might well be devised to correct such mistakes. Though the special mischief of idle landlordism is peculiar to Fiji, other influences, it has been seen, are working decay in the native population of the islands. All influences of this character can only be combated by a strong united authority pressing forward a coherent policy, in the knowledge that the native population in future must share to a greater degree the task of increasing the production of the islands, their international trade, and their Imperial value.

The remarkable prosperity of Java under Dutch colonization is due in large measure to the education of the natives, which is there carried to a high standard for those who desire it. With this widespread education, there has also increased amongst the natives the desire to learn Dutch. The example of Dutch management might well be considered in connection with the future British administration of the islands. The difficulty of a common language is at present got over very imperfectly by the use of Pidgin-English. But the establishment of Government schools in the more settled islands and the teaching of English would lead to the common language being eventually English. It is an invariable rule that where different languages co-exist, the superior drives out the inferior.

With the exception of New Guinea, including German New Guinea and also the Bismarek Archipelago, it is very questionable whether without forced labour—which is not likely to receive any serious support—there is any probability of native labour being obtained in sufficient quantity for the purpose of developing plantations on the various islands. If any considerable expansion of production is desired, labour for that purpose must be obtained from outside sources. If, however, the natives generally can be encouraged to cultivate for themselves coconut trees and coconut groves, and if measures are taken to safeguard their interests as traders, a considerable source of supply and wealth may in this way be developed, with advantage to the natives individually and collectively, and to island trade generally.

INDIAN LABOUR.

Practically the whole of the Indian population employed in the Western Pacific is located in the Fiji Group, and with the exception of an inappreciable minority they are employed in sugar production. The total population of East Indians serving under indenture on the last day of 1914 was 15,602—male adults, 9,644; female adults, 3,430; and children, 2,528; and of time-expired indentured immigrants remaining or settling in the colony there were 37,754. The total number of Indians in the Fiji Islands on the above date was therefore 53,356.

Whilst various witnesses, in their advocacy for Asiatic labour, desired that Indians and Chinese should be sought for that purpose, an undoubted preference was shown for Indian coolie labour, not so much for the coolie's superior efficiency as for the fact that he represented the more desirable class, and constituted the better type of settler. This is no doubt due to

SPECIAL ARTICLES—*continued.*

racial distinctions and habits of life. One witness asserted that the planter usually preferred the native labourer, since he was cheaper. That may be the case, say the Commissioners, but, for the reasons already pointed out, that source of supply can only be drawn upon in certain limited localities. The wages of the Indian coolie in Fiji averaged, without keep, in 1912, 13-32d. per day for ordinary unskilled labour under indenture. Rations are supplied to immigrants for six months, and to their children for twelve months after arrival. The retail cost of a week's full ration in Fiji for an Indian ranges from 3s. to 3s. 6d. Free labourers (Indian) in Fiji earn about 1s. 6d. daily on work requiring no special skill, and if a little skill and experience are required, 2s. will often be paid. The average wage paid to the native labourer is 10s. per month and keep, which is a little less than one-half of the net wages paid to an indentured coolie, and less than one-third of that of the free coolie labourer. Whilst no precise evidence was tendered as to the relative efficiency of the different classes of labour, it may be concluded that the Indian is capable of more sustained effort, and it is probable that the difference in wages on the average is recouped by the better service rendered. The Indians have already settled in large numbers in Fiji. They appear to be orderly and contented.

CHINESE LABOUR.

Unlike the Indians, the Chinese may be found scattered throughout the South Pacific Islands. There are no precise figures available as to the actual numbers, but from various sources it would appear probable that the total number does not exceed 4,000. As already pointed out, the Indians number 53,000, being located in Fiji. Whilst it is said that the Indians look down upon the islanders as "junglies," and will not mix with them, this is not the case with the Chinese, who are not affected by caste prejudices. On the other hand, the natives do not look with favour either upon the Indian or Chinese.

Chinese labour certainly is not looked upon by the officials in Fiji as a prospective solution of the labour difficulty. In the annual report of the Governor, for the year 1913, to the Secretary of State for the Colonies, it is stated:—"During 1913 Messrs. McNeill and Chimman Lal visited Fiji to inquire into the working of the system of indentured Indian immigrant labourers, and to report to the Government of India. It is not yet known what the result of this visit may be, but it is hoped that the system will be allowed to continue, as the agricultural prosperity of the colony must depend for many years to come on the supply of labourers from India."

GENERAL DEMAND FOR LABOUR.

Labour is in demand in the South Pacific for other than plantation purposes, and the statement of Mr. Alfred J. King (representative for Australasia of the Pacific Phosphate Company, Limited, which ships large quantities of phosphate-guano from Ocean Island and Nauru Island) fairly sums up the position, viz., that "no commercial enterprise of any magnitude can be carried on in the South Pacific without labour from outside sources."

Recruitment for native labour is conducted as far north as the Caroline Islands, and the indentured or restricted Asiatic labourer—whether Indian, Japanese, or Chinese—is eagerly sought after for industrial purposes. With a view to encouraging the supply and ameliorating the conditions of labour, it appears probable that in the near future indentured labour, by the influence of the respective peoples and Governments in India, China, and elsewhere, will either be considerably modified in the conditions in which it is at present regulated, or that it will be abolished altogether and free labour insisted upon, with the privilege of permanent residence and the right to hold land for the purpose of settlement.



## SPECIAL ARTICLES—continued.

[Since the present section of the Report was printed it has been stated that the Indian Government have finally decided to abolish the system of indentured control, and that, in conjunction with the Imperial authorities, that Government has provided a system of "State-aided colonisation" to take the place of the former methods. The new system provides for freedom of choice to the indentured immigrant into Fiji as to service after six months of "selected employment." Settlement by Hindoos is to be encouraged by rent-free garden plots and by grant of land up to five acres after three years' employment. Assistance is also to be provided for the emigration of families and for "back passages" to Hindoos wishing to return.]

## Notes on Trade.

[While every care is exercised to ensure the accuracy of any explanatory article or note 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.]

## CARGO FROM UNITED KINGDOM FOR GREECE VIA EGYPT.

In connection with the difficulties which have for some time restricted the export of goods from this country to Greece, it has now been arranged that transshipment may be effected in Egypt, and as regards the Port Said route, the Greek Government Transport Department has undertaken to provide in respect of goods urgently required in Greece a certain amount of tonnage space monthly between Port Said (see note below as regards Alexandria) and Greek ports, about one-quarter of the space being reserved for Salonika.

The following requirements and suggestions should be noted in this connection:—

(1) Applications for information as to space on vessels sailing between this country and Port Said should be addressed to the Secretary, Indian Conference Committee, 138, Leadenhall Street, London, E.C.3.

(2) For goods on the export prohibited list licences must first be obtained from the War Trade Department, 4, Central Buildings, S.W.1. In respect of goods which it is desired to export from the United Kingdom direct application must be made to that Department on the usual form. For goods brought to the United Kingdom for transshipment application should be made to the Customs Department on form S.90, copies of which can be obtained from the Custom Houses at transshipment ports. In respect of all goods, whether exported or transhipped, a recommendation from the British Minister at Athens will be required, except for goods of comparatively small value.

(3) When a licence is granted the Customs Department will on request issue the following documents which should be forwarded with the usual shipping documents to Port Said in order to facilitate clearance at that port. The documents should, in each case, be prepared by the exporter.

(a) For United Kingdom exports, Form S.73.

(b) For transshipments, a duplicate shipping bill.

(4) A through Bill of Lading is not issued, and it is therefore necessary to arrange for a shipping agent in Port Said to take the necessary steps in regard to the transshipment.

(5) Enquiries as to further details, or in respect of any difficulties which arise, may be addressed to the Department of Overseas Trade (Development and Intelligence).

With reference to the foregoing, a despatch from H.M. High Commissioner in Egypt, under date 28th August, observes that as the congestion at Port Said is far greater than at Alexandria, the Egyptian Authorities and the Naval Examining Officers would much prefer that the port of transshipment should be Alexandria rather than Port Said.

## NOTES ON TRADE—continued.

## TANNING MATERIALS IN GERMANY.

## PRIZES OFFERED FOR SUBSTITUTES.

The German Government, according to the German leather trade press, are offering prizes for the solution of the following three problems:—

- (1) A method of substituting, for the currying and dressing of leather, cod oil and other fish oils, as these oils are almost unobtainable.
- (2) A substitute for chrome salts for the production of leather of the nature of chrome-tanned leather; also a substitute for the production of leather by means of other mineral salts, or mineral salts combined with vegetable material which will produce a leather similar to combination tanned leather.
- (3) A method that can be used during the war that will result in a saving of vegetable tanning material without affecting the quality of the leather so produced.

A first prize of 20,000 marks, and a second prize of 5,000 marks are offered in these cases.

The offer of these prizes is believed to be a clear indication that Germans are suffering from a lack of fish oils and grease for stuffing leather, and from a shortage of chrome salts and of vegetable tanning materials. The judges are the Secretary of State von Moller, Prof. Emil Fischer, the distinguished chemist, Dr. Fahrion, the oil chemist, Prof. Paeffler, a leather trades chemist, and five large tanners.

## PRIVATE MOTOR CARS IN UNITED STATES.

The National Automobile Chamber of Commerce in America recently adopted resolutions voluntarily agreeing to curtail the production of private motor-cars by 50 per cent. as from 1st August.

The United States Government control of steel, leather, rubber, coal, etc., had already seriously diminished the output of pleasure cars, and the War Industries Board have now issued a warning stating that little, if any, of the materials required for the construction of private cars would be available after the needs of more essential industries had been met. Manufacturers of such cars were advised to devote their factories entirely to war work not later than 1st January next. The Ford Motor Company has closed down fifteen of its assembling plants, leaving only six in operation, and the output of the company has decreased from 3,100 cars a day to 750, of which 400 are commercial cars.

## THE LATE CONTROLLER OF OPTICAL MUNITIONS AND POTASH.

We regret to have to report the death of Mr. A. S. Esslemont, C.B.E., late Controller of the Optical Munitions, Glassware, and Potash Production Department of the Ministry of Munitions. On the creation of the Ministry of Munitions in the summer of 1915 Mr. Esslemont was one of the first to offer his valuable services as a volunteer.

His first task was to provide that all the numerous scientific and optical instruments which are essential to efficient armament should be made available. Later to his care was committed the complete control of the Glassware Industry in all its ramifications, and just before his death he was engaged in establishing the Potash Industry in this country. An account of the work of the Potash Production Branch was published in the "Journal" of 5th September, and a similar article on Optical and Chemical Glass will appear next week.

When it is remembered that these key industries had to be built up almost from their foundations, the constructive work done by Mr. Esslemont, under great physical disadvantages, will be appreciated by the public. All the trades under his charge were essential to the national safety, and had to be established in the shortest possible time. Our articles show how successfully Mr. Esslemont's task was carried through.



# Imperial and Foreign Trade.

## BRITISH EMPIRE.

### UNITED KINGDOM.

#### FOREIGN TRADE IN AUGUST.

The imports into the United Kingdom in August were valued at rather over £1 million more than in July, and the exports at £130,000 more, the total of produce and manufactures of the United Kingdom exported showing a small decrease, while the re-exports increased by £250,000.

The following table gives, under the three principal classes of articles, the values for August and July, 1918, and for the periods of eight months ended 31st August, 1918, 1917, and 1913. The figures showing the values of the various classes of articles imported and exported in August, 1918, and 1917, are given in the table on page 383.

	Food, Drink, and Tobacco.	Raw-Materials and Articles mainly unmanufactured.	Articles wholly or mainly manufactured.	Total, including miscellaneous and unclassified.
	Thousand £	Thousand £	Thousand £	Thousand £
<b>August, 1918—</b>				
Imports .. .. .	50,044	36,023	23,860	110,235
Exports—				
British .. .. .	954	6,423	34,402	43,522
Foreign & Colonial	194	339	1,141	2,277
<b>July, 1918—</b>				
Imports .. .. .	47,862	34,658	26,149	109,192
Exports—				
British .. .. .	952	5,307	35,283	43,644
Foreign & Colonial	185	786	1,951	2,922
<b>Eight Months ended 31st August :—</b>				
<b>1918—</b>				
Imports .. .. .	380,744	294,290	182,809	871,352
Exports—				
British .. .. .	7,859	40,488	271,782	333,999
Foreign & Colonial	1,863	10,493	8,797	21,978
<b>1917—</b>				
Imports .. .. .	330,639	244,364	112,285	690,823
Exports—				
British .. .. .	11,741	46,072	279,759	350,785
Foreign & Colonial	5,808	35,858	13,642	55,309
<b>1913—</b>				
Imports .. .. .	185,869	179,128	129,433	496,448
Exports—				
British .. .. .	19,090	45,703	276,997	348,331
Foreign & Colonial	19,281	47,982	20,992	75,517

The increase of over £2 millions in the value of food, drink and tobacco imported compared with the figures for July was due to a rise of £2 millions in the value of grain and flour, of £630,000 in that of "other food and drink, non-dutiable," of £3½ millions in that of dutiable food and drink, and to a fall of over £4 millions in the value of meat.

The imports of articles classed as raw materials and mainly unmanufactured exceeded by over £1½ millions those of the previous month, the principal differences being in oil seeds, nuts, oils, etc., with an increase of £2¼ millions, textile materials, except cotton, with an increase of £2½ millions, hides and skins with an increase of £700,000, and raw cotton, which shows a decrease of over £3¼ millions. The August imports of articles wholly or mainly manufactured were less than those of July by £2¼ millions, of which £1¼ millions was accounted for by a decrease in the value of aeroplanes, airships, balloons and parts thereof.

Among the exports of produce and manufactures of the United Kingdom the most noticeable differences between the values in August and July are an increase in August of nearly £1¼ millions in the value of coal and a decrease of £630,000 in the value of yarns and textile fabrics exported. The value of the exports of foreign and colonial merchandise (£2,277,000) was about one-half of the value in August, 1917, and in the eight months ended August, 1918, was only 38 per cent. of the value in the corresponding period of 1917. Most of this decrease is found in raw materials and articles mainly unmanufactured, raw cotton and rubber accounting for nearly £18 millions of the decrease of £25 millions in this class.

## IMPERIAL AND FOREIGN TRADE—continued

### BRITISH INDIA.

#### AGRICULTURAL AND INDUSTRIAL INTELLIGENCE.

The Indian Trade Commissioner in London has received the following telegram, dated 11th September, from the Director-General, Commercial Intelligence Department, Calcutta:—

**Monsoon.**—The rainfall is general, and floods are continuing in Bengal.

**Markets.**—Fine Broach, September delivery, is quoted at 922 rupees a candy. The piece-goods market is steady, though certain staple styles have experienced a fall. The resolution on cloth control caused a fall in local and Japanese goods.

**Legislation.**—A Bill to take powers to provide for cheap supply of cotton cloth for poorer classes was introduced into the Imperial Legislative Council on 4th September. A Bill to regulate trade in non-ferrous metals has also been introduced into the Legislative Council.

**Tea.**—The Indian Tea Association is pressing for the prohibition of import into India of Java tea.

#### PROGRESS OF IRRIGATION.

An interesting and comprehensive review of the progress of irrigation in British India for the year 1916-17 has been issued by the Public Works Department of the Government of India, and affords a very good idea of the past history, present position and future prospects of irrigation in the Peninsula.

The total area irrigated by all the productive public works amounted in the year to slightly more than seventeen million acres. Towards this total the Punjab canals contributed nearly eight million acres, Madras three and a half millions, the United Provinces two and a half millions, and Sind one and a half millions. The return on capital outlay was the highest in Madras, where, excepting two systems, the canals yielded 13.2 per cent. The next province was the Punjab, with a return of 12.99 per cent., while in the United Provinces and Sind percentages of 8.55 and 7.57 were obtained. The mean for the whole of India was 8.81 per cent.

Protected works irrigated totalled 385,000 acres and gave a return of 1.08 per cent., while minor works of all classes irrigated altogether were about eight million acres.

Among the large works contemplated are the Sukkur Barrage and the Sind canal system, which is now being investigated by a special staff, the Ghaggar Canal, and the great Sarada scheme in the United Provinces, and also five schemes in the Punjab.

## CANADA.

### WAR FINANCE, 1914-1918.

H.M. Trade Commissioner at Montreal has sent copies of an interesting official publication entitled "Canada's War Effort, 1914-1918." We extract the following information concerning Canada's War Finance:—

#### GOVERNMENT LOANS.

The Canadian Government, since the commencement of the War, has issued domestic loans as follows:—

	Amount Subscribed.	No. of Subscribers.
	dols.	
1. 1915/1925, 5 per cent. ....	97,000,000	24,862
2. 1916/1931, 5 per cent. ....	97,000,000	34,526
3. 1917/1937, 5 per cent. ....	142,000,000	41,000
4. 1917/1937 (Victory Loan), 5½ p.c.	398,000,000	820,035

In addition, War Savings Certificates to the amount of approximately 12,500,000 dols., as well as a considerable amount of debenture stock, have been sold, bringing the Government's borrowings from the people of Canada since the beginning of the War to the total sum of 755,000,000 dols., or, in other words, 100 dols. per capita of the population of the Dominion.

In addition to the domestic loans, Canada has issued between the years 1915-17 in Great Britain and in the United States, securities totalling more than 307,000,000 dols.

#### ADVANCES BETWEEN THE DOMINION GOVERNMENT AND GREAT BRITAIN.

Since the outbreak of war to March 31st, 1918, Canada has established credits on behalf of the Imperial Government to the amount of 532,816,397 dols. Through these advances

## IMPERIAL AND FOREIGN TRADE—continued.

Great Britain was able to finance the purchase of foodstuffs, hay and other commodities, and to carry on the operations of the Imperial Munitions Board in Canada.

In addition to the above, Canadian chartered banks have advanced to the Imperial Government, through the medium of the Minister of Finance, the sum of 200,000,000 dols. for the purchase of munitions and wheat. This was made possible by the large savings deposits in Canadian Banks, which, since August, 1914, despite the withdrawals for subscription to war loans, have increased by 276,000,000 dols.

On the other hand, Great Britain has made advances to the Dominion totalling 534,450,826 dols. These credits were chiefly for the maintenance of the Canadian troops overseas.

## REVENUE AND EXPENDITURE—31ST MARCH, 1914—

	Revenue.	Expenditure— Consolidated Fund.
	dols.	dols.
1914-15	133,073,481	135,523,206
1915-16	172,147,838	130,350,726
1916-17	232,701,294	148,599,343
1917-18	261,125,459	179,853,534

The Consolidated Fund expenditure for 1917-18 includes payment of interest, estimated at 45,000,000 dols. and pensions of some 7,000,000 dols., or 52,000,000 dols. altogether, whereas prior to the War the outlay on interest was but 12,000,000 dols. and on pensions practically nil.

	Expenditure, Capital Account.	Expenditure— War Account.
	dols.	dols.
1914-15	41,447,320	60,750,476
1915-16	38,566,950	166,197,755
1916-17	26,880,031	306,488,814
1917-18	43,536,563	342,762,687

Up to March 31st, 1918, the total outlay for the War was approximately 875,000,000 dols. This amount includes all expenditure in Canada, Great Britain and France, and is also inclusive of the upkeep of the troops overseas. During the past two fiscal years there has been applied to war expenditures by way of surplus of revenue over ordinary and capital outlays, the sum of 113,000,000 dols. The interest and pension payments attributable to the War amount for the entire war period to approximately 76,000,000 dols. These also have been provided from the Consolidated Revenue Fund.

## NET DEBT.

The net debt of Canada, which, before the War, stood at about 336,000,000 dols., has now passed the billion-dollar mark, and it is estimated that when the accounts for the year 1917-18 are closed it will reach, approximately, 1,200,000,000 dols. The increase is almost entirely attributable to war expenditures.

## WAR TAXATION.

Taxation on luxuries has been gradually introduced since the beginning of the war as it was justified by the financial condition of the country. Increased customs duties and higher rates of excise on certain commodities, including liquors and tobacco, imposed soon after the commencement of the War, were followed in 1915 by a war tax on transportation tickets, telegrams, money orders, cheques, letters, patent medicines, etc. In 1915 an increase of 7½ per cent. *ad valorem* to the general tariff and 5 per cent. *ad valorem* to the British preferential tariff was made on all commodities with the exception of certain foodstuffs, coal, harvesting machinery, fisheries equipment, etc.

In 1918 a special customs duty was imposed on tea and coffee, and the excise on tobacco was increased. In addition, various other taxes were imposed or increased, and a special war excise tax was imposed on various articles, including automobiles, jewellery, etc.

Under the Business Profits War Tax Act, as at present amended, the Government, in the case of all businesses having a capital of 50,000 dols. and over, takes 25 per cent of the net profits over 7 per cent. and not exceeding 15 per cent., 50 per cent. of the profits over 15 per cent. and not exceeding 20 per cent., and 75 per cent. of the profits beyond 20 per cent. In the case of businesses having a capital of 25,000 dols. and under 50,000 dols., the Government takes 25 per cent. of all profits in excess of 10 per cent. on the capital employed. Companies employing capital of less than 25,000 dols. are exempted, with the exception of those dealing in munitions or war supplies.

The Canadian income tax, which comes into effect in the year 1918-19, is in many respects higher than that in force

## IMPERIAL AND FOREIGN TRADE—continued.

in the United States. The scale provides for the exemption of incomes, in the case of unmarried persons with an income of 1,000 dols. and under, and in the case of married persons with an income of 2,000 dols. and under. There is also provision for the exemption of 200 dols. for each child. The present scale of income tax is shown by the following table:

Income.	Tax.	Income.	Tax.
(Married persons.)	dols.	(Married persons.)	dols.
3,000	20	200,000	50,957
6,000	140	400,000	142,757
10,000	392	500,000	195,407
20,000	1,382	600,000	248,057
30,000	2,702	800,000	366,857
50,000	5,782	1,000,000	499,157
75,000	11,007	2,000,000	1,228,157
100,000	17,607		

During the last fiscal year the Dominion Government collected by way of War Taxation the following (in approximate figures):

Tax on Trust and Loan Companies	267,500
Tax on Insurance Companies	385,000
Tax on Banks	1,115,500
Inland Revenue from Railways, Steamships, Telegraph and Cable Companies, etc.	2,230,000
Extra postage on letters, etc.	5,800,000
Business Profits War Tax	21,275,000
Increased Customs duties	45,000,000
<b>Total</b>	<b>76,073,000</b>

## GOLD SHIPMENTS.

Reference should be made to the fact that since the outbreak of the War quantities of gold coin and gold bullion to the value of 1,300,000,000 dols. have been received at Ottawa by the Department of Finance as trustee for the Imperial Government and the Bank of England.

## ROYAL MINT, OTTAWA.

The work of the Royal Mint, Ottawa, which is a branch of the Royal Mint, London, has been greatly increased by war conditions.

When the large deposits of gold referred to above were received by the Department of Finance, it was necessary that their value should be ascertained and that a certain quantity of gold bullion should be refined. The heavy demand on the gold refinery at the Mint led to the construction (in eight weeks) of a second plant with a monthly output of a million ounces of fine gold. Through this extension this refinery has developed the largest capacity of any gold refinery in the world.

The special work of the refinery due to the War is shown by the following figures:—

Gold bullion received for refining, 15,992,770.25 oz. gross.  
Total gold bars produced, 14,048,803.958 oz. fine; value 290,414,547 dols.

Fine silver recovered, 1,175,500.03 oz. fine.

The War having made it impossible for the Newfoundland Government to get its supplies of coin from the United Kingdom, coinage for the Colony was carried out by the Ottawa Mint in 1917 and 1918 as follows:

1,670,000 silver pieces.  
700,000 bronze "

In addition to the above operations, certain parts for gun-sights were produced at the Royal Mint, Ottawa, for the Imperial Government. These consisted chiefly of eye-piece cells, and the total production up to 31st, March, 1918, of this equipment amounted to 25,536 parts.

## REVENUE AND EXPENDITURE.

The High Commissioner for Canada is informed by cablegram from the Minister of Immigration and Colonisation at Ottawa that there has been an increase of over 12,500,000 dollars in the revenue of the Dominion for the first five months of the current fiscal year, ended 31st August. This increase is encouraging because the Customs collections in the same period fell off by approximately seven million dollars. The jump in miscellaneous receipts—including a number of new War Taxes—from a total of 6,803,000 dollars for the period April-August, 1917, to a total of 16,877,000 dollars for the same period of this year, makes up for the loss in Customs revenue and provides 3,000,000 dollars out of the twelve and a half millions total increase. The total revenue for the five months was 118,350,000 dollars, as compared with 105,785,600 dollars in the same period of last year. War expenditure in the five months totalled 63,530,000 dollars, as against 51,427,000 dollars during the months

IMPERIAL AND FOREIGN TRADE—continued.

April to August, 1917. During the month of August Canada spent 19,571,723 dollars on the war. The net debt of the Dominion now stands at 1,196,239,346 dollars.

GOVERNMENT CONTROL OF WHEAT.

The Government of Canada has assumed the complete control of the purchase and sale for export of Canadian wheat, together with the control of the methods of export. Under the new arrangement, the purchase of grains for export and internal use will be thrown open to dealers and shippers as before, subject to the supervision and control of the Government, instead of being done through the Wheat Export Company as formerly. The Government guarantee the purchase of all the surplus of merchantable wheat raised in Canada this year at the present fixed price, and will also attend to the apportionment of the grain to the millers. The Dominion will also control all freight cars and lake tonnage allotments. The Board of Grain Supervisors at Winnipeg, the members of which represent the producers, shippers and consumers, will be entrusted by the Government with the carrying out of the new arrangements and invested with the necessary powers.

SOUTH AFRICA.

TRADING WITH THE ENEMY.

The Government "Gazette" of 19th July contains an Ordinance amending the law relating to trading with the enemy. It is laid down that the law for the time being in force "shall apply to all persons of enemy nationality who have been removed from any part of His Majesty's dominions for the purpose of being interned and are interned in any neutral country, in the same manner as it applies to persons resident or carrying on business in an enemy country." The Ordinance does not prohibit anything which shall be expressly permitted by any licences officially granted to individuals or announced as applying to classes of persons.

GIBRALTAR.

COPYRIGHT ORDINANCE.

With reference to the notice on page 185 of the "Board of Trade Journal" of 8th August, relative to a draft of an Ordinance providing for the detention and forfeiture of books, etc., infringing copyright, it is notified that this Ordinance has now been approved by the Governor and published in a Supplement to the "Gibraltar Chronicle and Official Gazette" of 7th August. This Ordinance (No. 17 of 1918) provides for the detention and forfeiture of books, etc., infringing copyright, and fixes penalties for importing, selling or otherwise dealing in such copies.

The Ordinance is drawn up under the Imperial Copyright Act 1911, and may be cited as the Copyright Ordinance, 1918. The Copyright Ordinance, 1914, is repealed.

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

EUROPE.

SPAIN.

LEGISLATION RESPECTING FOREIGN SECURITIES.

A Royal Decree, dated 11th August and published in the "Gaceta de Madrid" of 20th August, makes applicable to securities placed abroad by Spanish subjects the prohibition established by the Decree of 14th June, 1916, forbidding the advertisement, issue, putting into circulation, or sale, mortgage, or introduction into the Spanish market of bonds and other public securities of foreign Governments, as well as shares, bonds or securities of any kind of non-Spanish companies or corporations. The Council of Ministers reserves, however, the right to make such exceptions as may be deemed advisable.

The foreign securities domiciled in Spain before the 15th June, 1916, as also those whose introduction into Spain has been authorised in accordance with the Royal Orders of 16th and 25th August and 30th September, 1916, or may be authorised in the future, must be stamped and recorded in a special register.

From the date of this Decree the inclusion in the official Stock Exchange quotations of new foreign public issues or of commercial securities to bearer of enterprises not domi-

IMPERIAL AND FOREIGN TRADE—continued.

ciled in Spain (even though they have branches established in Spain) will not be authorised.

(Previous notices respecting legislation affecting foreign securities in Spain appeared in the "Board of Trade Journal" of 6th July and 7th September, 1916.)

WAR MATERIAL TO BE OF HOME PRODUCTION.

The "Gaceta de Madrid" of 24th July contains the text of a Law which enacts that all material purchased for the Defence of the Realm must be of home production. The first section, dealing with certain exceptions, is as follows:

All material purchased in the futuro for use by the armed or other services of the Defence of the Realm must be the produce of Spanish industry and labour, with the sole exceptions enumerated hereunder.

PERMANENT EXCEPTIONS.

1. The instruments, tools and machines necessary for the installation, extension, improvement, or upkeep in Spain of the manufacture of military material, when it is unavoidable that same be imported from abroad.

2. Models referring to patents of invention, and in general, to titles and permits granted in connection with industrial property rights, held by foreigners, when same are required or their purchase is considered advisable for the manufacture in Spain of military material. If it should not be possible to obtain the models with permits without at the same time purchasing material of foreign make, that is protected by the industrial patent, these purchases must be reduced to a minimum.

3. Such articles and accoutrements as by their nature and application are neither used nor consumed so rapidly as to exhaust in the longest of wars the stores accumulated during the time of peace, provided always that such preventive storage be more suitable for the public needs than the manufacture in the country of such parts or instruments.

TEMPORARY EXCEPTIONS.

1. Until the new manufactures referred to in this Law are produced in this country (viz., are "nationalised"), which shall take place within five years, the importation will be allowed of foreign material that is indispensable, on account of the impossibility of obtaining it in Spain, for maintaining the manufacture in the country, whether official or private, of military material; but these imports must be restricted to the minimum quantities required to satisfy these requirements.

2. Until they can be found within the Realm, the services of foreign experts and foreign foremen and workmen may be used for the maintenance or improvement of Spanish industrial undertakings engaged upon work for National Defence.

[A translation of the full text may be seen at the Enquiry Office of the Department of Overseas Trade (Development and Intelligence.)]

SWEDEN.

PROTECTION OF FOREIGN PATENTS.

The Foreign Office has received the text of a Royal Decree, which came into force on 31st July, postponing by one year—that is to 31st July, 1919—the date before which applications by foreign patentees for a Swedish patent must be lodged in Sweden in order to claim priority in that country. A translation of the body of the Decree runs as follows:—

In regard to an invention which, either by patent or as a *modèle d'utilité* is protected in one of the following foreign States, viz., Brazil, Denmark, France, Italy, Japan, the Netherlands, Norway, Portugal, Switzerland, Spain, Great Britain and Ireland, Tunis, Germany and Austria-Hungary, the following applications shall apply until further notice (notwithstanding what is laid down in Par. 1 of the Royal Decree of the 27th October, 1916, containing Amended Regulations with regard to Protection for certain Foreign Patents, Trade Marks and Designs, as a condition for the application of the regulations made by the said Paragraph, with regard to the time within which a Patent, in the case there referred to, should be applied for in Sweden), namely, that if any person has applied in Sweden for a patent on an invention for which he had previously, but not before the 31st July, 1913, applied for protection in the foreign State, the first-mentioned application, in relation to other applications, as well as with reference to such impediment to the grant of the patent as is referred to in Paragraph 3 of the Patent Ordinance, shall be deemed to



## IMPERIAL AND FOREIGN TRADE—continued.

have been made simultaneously with the application in the foreign State, provided the application in Sweden has been made prior to the 31st July, 1919, and provided the applicant, before a decision has been taken by the Swedish Patent Authorities to publish the application in the "Official Gazette," lodges with the said authorities a claim to the priority referred to in Paragraph 25, Clause 1, of the said Ordinance, stating the foreign country where protection has been previously applied for, as well as the date when this took place.

## ASIA.

## JAPAN.

## PRICES OF COMMANDEERED RICE.

The Foreign Office has received a telegram from Tokio to the effect that the "Official Gazette" of 27th August contained prices at which rice is to be commandeered by the Government, viz., from 5th September to 20th September, at yen 33 per koku, and from 21st September at yen 30.

The price of rice in August, owing to the action of speculators and of farmers who were holding up the stocks, had reached yen 46 per koku, compared with yen 22 at the same time last year, and yen 14 in 1916.

## LATIN AMERICA.

## ARGENTINA.

## NEW MAGAZINE FOR ELECTRICAL AND MECHANICAL TRADES.

Allied and neutral advertisers in the Argentine Republic have, by the co-operation of the Electrical Committee of the British Chamber of Commerce, founded a magazine for electrical and mechanical trades entitled "La Revista de las Industrias Electricas y Mecanicas." This is published under the auspices of the Chambers of Commerce of the Allied nations.

The new publication is receiving every support from Allied and Neutral advertisers, and is an entirely superior review compared with another, which was issued by a German and devoted principally to enemy interests in those trades.

The publisher of "La Revista" is Mr. H. Truman Frith, of Calle Maipu 187, Buenos Aires, who has despatched various copies of the first number to his London representatives, the Dorland Agency, 16, Regent Street, London, together with all details and advertising rates, which will enable them to deal with any enquiries made to them in England. These copies will be available for perusal by any firms interested in the magazine, thus enabling them to obtain correct data regarding publication.

The advertising opportunities afforded by this initiative is brought to the attention of British firms interested in the export trade of electrical and mechanical goods to the Argentine Republic, and copies will be circulated not only in that Republic, but also in Uruguay, Paraguay and Chile.

H.M. Commercial Attaché at Buenos Aires will be glad to receive for publication in the review any matter dealing with British progress in the electrical, mechanical and allied trades.

## BRAZIL.

## TAX ON CORPORATIONS.

A Decree, dated 5th June, provides for a 5 per cent. tax on dividends of banks, corporations, and companies whose capital has been constituted by shares issued in Brazil.

The tax must be paid within 30 days after dividends are declared, and no distribution of profits will be made until the tax requirements are satisfied. Announcements will appear in the "Diario Oficial," as well as in the organs of the State or Municipal Governments, of the declaration of dividends and the exact amount of taxes due on them.

The Government offices in charge of the collection, the Decree states, must keep a record of the organisations that pay dividends, showing the number and value of shares and rates of interest. Firms failing to pay the tax within the period specified will be subject to a fine of 1 per cent. of the tax. Companies failing to make a report on dividends will be subject to fine, which will not, however, relieve them from any other penalties.

This Decree, which has effect from 1st July, 1918, was authorised by a law of 31st December, 1917, and it has been the subject of much concern among foreign corporations operating in Brazil.

## IMPERIAL AND FOREIGN TRADE—continued.

## 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 at present 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 among 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:—

Pipe cleaners.

Frames for spectacles and eyeglasses (rolled gold, nickel, etc.).

## AUSTRALIA.

ELECTRIC LAMPS.—H.M. Trade Commissioner in Australia has forwarded a copy of the specification, conditions of contract and tender form, together with blue print, in connection with a call for tenders by the Victorian Railways Commissioners for the supply and delivery of electric lamps for power signal system, viz., 11,000 lamps of 6 volt, and 2,950 of 110 volt. (Contract No. 31,758.)

[See Notice to Manufacturers and Exporters above.]

Copies of the above-mentioned specification, etc., may be obtained from the Victorian Railways Commissioners, Spencer Street, Melbourne, at which address, also, sealed tenders on the proper form, will be received up to 11 a.m. on 23rd October.

A preliminary deposit equal to  $\frac{1}{2}$  per cent. of the total amount is required. Local representation is necessary.

The above-mentioned copy of the specification, etc., may be consulted by British manufacturers of electric lamps at the Enquiry Room of the Department of Overseas Trade (Development and Intelligence).

It will be observed that the time for the receipt of tenders is limited, and this notice, therefore, will be of use only to firms having agents in the Commonwealth who can be instructed by cable.

TELEGRAPH AND TELEPHONE INSTRUMENTS, PARTS AND MATERIAL.—The Imperial Trade Correspondent at Perth has forwarded a copy of the specifications, conditions of contract and forms of tender, in connection with a call for tenders by the Deputy Postmaster-General, Perth, W.A., for the supply and delivery of (1) various telephone switchboard parts (Schedule No. 604 W.A.) and (2) various telegraph and telephone instruments and parts and battery material (Schedule No. 605 W.A.).

[See Notice to Manufacturers and Exporters above.]

Copies of the specification, etc., may be obtained from the General Post Office, Perth, Western Australia, at which address, also, sealed tenders, on the proper forms, will be received up to 3 p.m. on 2nd October.

A deposit of 2 per cent. on the first £500, and of 1 per cent. on the amount above that sum, is required for each tender; minimum deposit of £2.

The tenderer, if not resident in Australia, or, if a company, registered outside the Commonwealth, must name an agent in Australia to receive notifications of acceptance and other notices under the contract.

The above-mentioned copy of the specifications, etc., may be consulted by British manufacturers of the goods mentioned at the Enquiry Office of the Department of Overseas Trade (Development and Intelligence).

It will be observed that the time for the receipt of tenders is limited, and this notice therefore will be of use only to firms having agents in the Commonwealth who can be instructed by cable.



**IMPERIAL AND FOREIGN TRADE—continued.**

**BRITISH INDIA.**

H.M. Trade Commissioner in Calcutta reports the receipt of the following enquiries from local firms:—

**HARDWARE SPECIALITIES, ETC.**—A firm of general indent commission agents wishes to open up connections with the bazaar, for United Kingdom hardware firms desiring energetic representation in Calcutta. The lines the firm are principally interested in are metals, hardware and general Birmingham goods, and while they intend to continue the general commission indent business after the war, they are particularly desirous of obtaining agencies for specialities in hardware lines. They have a sound experience and widespread connections in the bazaar trade, and a competent native staff to ascertain the financial standing of dealers. (Reference No. 275.)

**SHEFFIELD STEEL AND BAZAAR TRADE SUNDRIES.**—Another firm is open to take up a good agency for manufacturers of Sheffield steel, and agencies also for United Kingdom manufacturers of almost any line which has a sale in the bazaar. The firm claims to do a good general commission indent business with the bazaar, particularly in hardware, metals, piece-goods (in which line it proposes to extend its business considerably after the war), and sundries generally. (Reference No. 276.)

**HEAVY CHEMICALS.**—An old-established firm of merchants and commission agents, etc., doing a considerable import business, desires to obtain agencies for United Kingdom manufacturers of heavy chemicals. (Reference No. 277.)

**PIECE GOODS.**—A firm, having recently opened an import department for piece-goods, etc., desires to get into touch with manufacturers of Manchester and Bradford piece goods, with a view to obtaining agencies therefor. (Reference No. 278.)

[See Notice to Manufacturers and Exporters above.]

[NOTE.—In the case of the first three enquiries the address of the London office of the firm referred to may be obtained on application to the Enquiry Office of the Department of Overseas Trade (Development and Intelligence).]

**CANADA.**

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

**DRUGS, CHEMICALS, ETC.**—A company, in that city, already representing several important American manufacturers, desires to obtain agencies for the whole of the Dominion, for United Kingdom manufacturers of drugs, chemicals for tanners, etc., and rubber, paint, oil and varnish manufactures and colours of all descriptions. The company are, it is stated, well known to the wholesale drug trade and paper, rubber and paint manufacturers. While they realise that transactions under present conditions are obtained with difficulty, they consider that a good business in these lines should be possible after the war. (Reference No. 279.)

**COTTON TWINES AND JUTE AND HESSIAN BAGS.**—A company in Ontario desires to represent throughout Canada United Kingdom manufacturers of cotton twines of all kinds and jute and hessian bags. The company states that it operates on a cash basis in buying from the United Kingdom. (Reference No. 280.)

**MILLINERY, FANCY GOODS, HOSIERY, ETC.**—H.M. Trade Commissioner at Montreal reports that an agent in that city desires to obtain, on a commission or consignment basis, an agency either for United Kingdom manufacturers or exporters of millinery, fancy goods, hosiery and general dry goods. The enquirer, who claims to have had a long business experience, travelling for many years throughout the Dominion on behalf of his firm, is prepared to undertake the representation for the whole of Canada, and proposes to place two or three travellers at work so as to cover the territory satisfactorily. (Reference No. 281.)

[See Notice to Manufacturers and Exporters above.]

**MALTA.**

**HAND AND MACHINE SEWINGS AND YARNS.**—The Collector of Customs at Valetta (the Board of Trade Correspondent for Malta) reports that a firm of general merchants' and manufacturers' agents in that town, is open to take up an additional sale agency for Malta, on a commission basis, for United Kingdom firms manufacturing and exporting the following goods:—All classes of hand and machine sewings for the boot and shoe, clothing, dressmaking and blouse trades, and for domestic uses; also yarns for knitted hosiery and embroidery works.

The firm is also prepared to consider suggestions for United Kingdom firms interested in the Maltese market who wish

**IMPERIAL AND FOREIGN TRADE—continued**

to deal with it as buyers on its own account, instead of as agents on a commission basis. (Reference No. 282.)

**NEW ZEALAND.**

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

**TEXTILE PIECE GOODS.**—A manufacturers' agent at Christchurch, who has been for about eight years with one of the largest New Zealand firms of agents for soft goods, and for more than four years was managing director of that business, has recently started business on his own account and would be glad to obtain agencies for United Kingdom manufacturers of textile piece goods in wool, cotton, linen or union, which do not conflict with agencies already held (Italian cloths, clothing, trimmings and white cotton dress goods). The enquirer states that only first-class houses who thoroughly understand the shipping trade would be of interest. (Reference No. 283.)

**HARDWARE.**—An agent at Wellington wishes to negotiate with United Kingdom hardware firms, with particular regard to after-war trade. The enquirer is prepared to operate agencies throughout the whole of New Zealand, and would prefer to work on a commission basis. (Reference No. 284.)

**IRONMONGERY, CROCKERY, FARMING REQUISITES, ETC.**—A firm of grocers and general merchants at Greymouth wishes to obtain agencies, for the Dominion, for United Kingdom manufacturers and exporters of ironmongery, crockery, farming requisites, general grocery lines, etc. The firm states that it intends to open a branch in Christchurch as soon as the railway connection between Greymouth and Christchurch is completed, and to send travellers throughout the whole Dominion. (Reference No. 285.)

[See Notice to Manufacturers and Exporters above.]

**BRAZIL.**

**ANILINES.**—H.M. Consul-General at Rio de Janeiro reports that a business man, with a long experience in local textile factories, seeks agencies for United Kingdom manufacturers of anilines. The enquirer is prepared, if required, to act as buying agent, but would prefer to work on commission.

[Reference No. 286. See Notice to Manufacturers and Exporters above.]

**DOMINICAN REPUBLIC.**

**DRY GOODS, ETC.**—A firm at San Pedro de Macoris desires to get into touch with United Kingdom manufacturers and exporters wishing to be represented in the Republic. The firm is principally interested in all kinds of dry goods, but will consider any other lines which, in their opinion, may be productive of business. They claim to have a special commission department, in charge of foreign representatives, in order to promote the sale of foreign products on behalf of shippers, while in some instances they are in a position to make purchases on their own account. Correspondence may be in English.

[Reference No. 287. See Notice to Manufacturers and Exporters above.]

**FRANCE (Algeria).**

**FOODSTUFFS, ETC.**—H.M. Consul-General at Algiers reports that a business man, established in business in that city since 1910, is prepared to take up agencies for any United Kingdom firms desiring to open up relations with Algeria. The enquirer has, up to the present, principally handled foodstuffs, and it is for this line of goods that he particularly desires to obtain agencies, preferring to act for the actual producers rather than for exporters. Correspondence may be in English.

[Reference No. 288. See Notice to Manufacturers and Exporters above.]

**SPAIN.**

**IMITATION JEWELLERY.**—H.M. Consul-General at Barcelona reports that a firm of jewellers and silversmiths, established in that city since 1878, desires to enter into relations at once with United Kingdom firms prepared to do business in Barcelona, and would be glad to receive offers from manufacturers of imitation jewellery, including rolled gold articles, etc.

[Reference No. 289. See Notice to Manufacturers and Exporters above.]

# Shipping and Transport.

## UNITED KINGDOM.

### VARYING SPEEDS OF SHIP CONSTRUCTION.

Among the merchant ships completed during the month of August were a number of the "B" type of Standard Steamer. These vessels are 5,100 tons gross or 8,100 tons deadweight, 400 ft. long, 52 ft. broad, 31 ft. deep, 25 ft. draught, 2,500 h.p., with a speed of 11 knots. The following table shows the time taken by different shipyards in the construction of this type of vessel:—

Yard in—	From Laying Keel to Launch. 23 weeks	From Keel Laid to Completion. 21 weeks
Belfast	31	41
Stockton	33	42
Sunderland	37	44
South Shields	37	44
Hull	34	47
Sunderland	35	48
"	45	54
Glasgow	46	55
"	47	55

## CANADA.

### OUTPUT OF MERCANTILE MARINE.

In a descriptive account of Canada's war effort, issued by the Director of Public Information, Ottawa, the following table is given of the number of ships which have been launched since 1st January, 1918, or will be launched before 31st December, 1918:—

	Steel Vessels. Dead weight carrying capacity (approx.).	Wooden Vessels. Dead weight carrying capacity (approx.).
Built to order of Imperial Munitions Board (34 of steel and 45 of wood)	179,800	138,600
Built to order of Dept. of Marine (11 of steel)	48,000	—
Built under private contract (14 of steel and 8 of wood)	62,400	17,800
Total	290,200	156,400
Total: Ships		112
Tonnage (approx. deadweight carrying capacity)	446,600	

The above figures do not include a large number of small craft of less than 1,000 tons, at present building, such as trawlers, drifters, small schooners, etc.

## NEW ZEALAND.

### REVIEW OF HARBOUR CONDITIONS.

The authorities of New Zealand's main and terminal ports are fully alive to their future possibilities. Auckland and the port of Wellington have natural advantages of depths of water commensurate with their requirements. In the South Island nature has not been so kind, and at Lyttelton and Dunedin considerable expenditure will be required to secure the water necessary for vessels of 30 to 40 ft. draught. In the meantime, for the large oversea vessels, they must continue to be worked as tidal ports, in common with most British ports, and all Australian ports save Sydney and Hobart.

#### CLASSES OF HARBOURS.

In an inaugural address delivered recently to the New Zealand Society of Engineers, the President dwelt on the administration of the Dominion's harbours and waterways.

The harbours of the Dominion, he said, may be divided into two classes. In the first class are those which are centres of trade and the rendezvous for large shipping, also those, both natural or artificial, which promise to become, as commerce and population increase, ports of trade for oversea vessels. In the other class would be included those known as coastal ports, which, from their environment and incapacity to receive large vessels, can never develop into first-class ports.

Some importance attaches to a well-considered classification of the Dominion's ports, in view not only of the future development of New Zealand's mercantile marine, but in respect to the expenditure on harbour improvements, which in the aggregate entails on the community, even at this early

### SHIPPING AND TRANSPORT—continued.

stage, a considerable financial burden. The systems of harbour control in vogue throughout New Zealand, and their relation to successful harbour development and control, are, consequently, of great importance.

The management of ports and harbours as a Department of State has been generally superseded by a system of local control, and boards have been duly constituted and given statutory powers to raise loans for works, levy rates, and carry on the functions of harbour development and supervision, subject, of course, to Government approval and audit.

#### UPKEEP OF HARBOURS.

There are in the Dominion forty-five harbours controlled by boards, twenty-five of which have an aggregate loan indebtedness of nearly £7,120,000, with assets other than cash valued at £8,444,000, and total annual charges for interest and sinking fund amounting to £350,000. The loan indebtedness of the terminal and main ports, viz., Auckland, Napier, Wellington, Lyttelton, Timaru, Dunedin, and the Bluff, amount to £5,400,000.

Most of these ports possess landed property of great prospective value, notably at Auckland, Napier, Wellington, and Dunedin, where the endowments of land and land reclaimed from the sea are city lands, and the sources of considerable revenues which are in every case increasing every year. For example, the port of Dunedin possesses 145 acres of land in the city of Dunedin available for leasing. From the portion fully absorbed into the city rentals at the rate of £1,500 per acre are obtained. When it is remembered that Dunedin, like other New Zealand towns, is yet in its infancy, it can be predicted that such an estate will some day provide a revenue large enough to meet the cost of harbour improvement and maintenance.

With similar endowments and an increasing trade, there is no question as to the ability of the larger ports to finance the undertakings necessary for an expanding trade, provided ordinary wisdom and foresight are exercised.

The position, however, with respect to some of the subsidiary coastal ports, especially those commanding country which is as yet sparsely populated, cannot be said to be generally assured. Where little or no trade has developed, the opening up of the land by railway or road may effect a diversion of traffic and result in the stagnation or ruin of the port. In the meantime, money has been spent on improvement works, which in the future may become useless, and the port authority may have contracted liabilities which it finds impossible to meet.

#### SUGGESTED REFORMS.

Before spending money on subsidiary ports, the President stated, ordinary caution would suggest that consideration should be given as to the character and location of existing and probable future communications. This might best be done under the auspices of the State by a Commission or board of experts qualified to advise as to the prospective transport requirements of the district by land or sea. Such a body would necessarily study the extent of the resources of the district, and their development, a knowledge of which would determine the amount of expenditure that would be warranted on any harbour or other public work, and also, if subsidised by the State, the proportion that should be borne by the local body.

The provision of harbour depths and of berthage to suit the class and size of vessels trading and expected to trade must naturally be the first consideration of port authorities. In the days of sailing ships it was usually all that was needed and expected. But with the advent of larger and costlier mechanically-propelled vessels their rapid clearance becomes an economic necessity.

Wharves and quays to suit modern shipping require to be built substantially, and often represent in cost the larger portion of the available capital expenditure. To make the best use of the wharfage should therefore be aimed at, and vessels given quick dispatch by installing modern appliances for the rapid handling of cargo, also equipment for expediting the clearing of wharves and sheds. This becomes more important to ships and ports alike as vessels become larger and trade competition keener between port and port.

## ITALY.

### RAILWAY STATISTICS.

The annual report of the Italian State Railways for the working year 1917 states that the total revenue derived amounted to 1,204,986,698 lire, while total expenditure was 1,120,280,951 lire, thus allowing an amount of 84,705,746 lire to be turned over to the Treasury.

**SHIPPING AND TRANSPORT—continued.**

The following statistics show the receipts and expenditure for 1913-14 and 1916-17:—

Items.	1913-14 Lire.	1916-17 Lire.
Receipts .....	614,600,000	1,204,900,000
Expenditures .....	586,500,000	1,120,200,000

The large figures in the receipts for 1916-17 are due to the military transport traffic. The revenue from ordinary traffic was 532,000,000 lire, as compared with 533,700,000 lire in 1915-16, with 526,700,000 in 1914-15 and 572,700,000 in 1913-14.

The increase in expenditure is attributed to the following chief causes:—

- (1) The greater cost of combustible and other railway material required;
- (2) larger salaries to staff and operators;
- (3) allowances for personnel under arms;
- (4) bonus for high cost of living;
- (5) difference in exchange;
- (6) interest and depreciation fund.

According to the latest returns available, there are 14,120 kilometres of State railways in operation in Italy.

**UNITED STATES OF AMERICA.**

**REINFORCED CONCRETE FREIGHT CAR.**

A contract is stated to have been let for the building of a reinforced concrete gondola freight car, which will be completed in sixty days. The car is to have a capacity of 100,000 pounds and a length of forty feet. It will cost several hundred dollars less than wooden and steel cars of the same type, and will require only 6,000 pounds of steel in its construction as compared with 32,000 pounds for the ordinary steel cars.

**Minerals, Metals, etc.**

**SOUTH AFRICA.**

**STANDARDISATION OF MINING STORES.**

H.M. Trade Commissioner in South Africa has transmitted a list showing the items of mining stores which have been standardised, and those of which standardisation is still under consideration by the Transvaal Chamber of Mines. The list is as follows:—

- Items completed and Standards issued.—
- Battery Shoes.
  - " Dies.
  - " Heads.
  - " Stems.
  - " Camshafts.
  - " Screening, medium and fine.
  - Grizzly Bars.
  - Skip Wheels.
  - Rails.

- Items completed and now in print.—
- Battery Tappets.
  - " Cams.
  - " Keys and Gibs.
  - " Blanton Wedge.
  - Screening, coarse.
  - Electric Lamps.

- Items under consideration.—
- Truck Wheels and Axles.
  - Fishplates and Bolts for rails.
  - Piping.
  - Conveyor Belts.
  - Filter Cloths.
  - Pulley Centres.
  - Conveyor Idlers.

Prints showing full details of the nine items in the above list for which standards have been issued are at the Department of Overseas Trade (Development and Intelligence) and may be consulted there.

**SWEDEN.**

**THE IRON INDUSTRY, JANUARY-MARCH, 1918.**

A report presented to the Association of Ironworks shows in some cases lower figures for iron exports in the first quarter of 1918 than for the corresponding three months period in 1917. This, it is stated, is due to the waiting attitude of the world's market.

**MINERALS AND METALS—continued.**

The largest reduction is in exports of rolled and hammered iron and steel, with a natural resulting decrease in production. Pig iron shows an increase in exports of 2,000 metric tons. Imports of pig iron showed a decrease of 16,700 metric tons.

**TOTAL EXPORTS.**

The total exports of iron ore for the first quarter of this year were 347,000 metric tons. The following table shows, in metric tons, the exports of iron for the first quarter of 1917 and 1918:—

Articles.	January 1-March 31.	
	1917. Tons.	1918. Tons.
Pig iron .....	41,400	43,400
Ferro-silicon and ferro-silico manganese .....	4,400	4,500
Iron, sponge, etc. ....	800	1,100
Scrap .....	300	—
Bar ends .....	900	1,000
Ingots .....	1,900	1,200
Blooms .....	1,200	500
Rough bars .....	5,700	6,600
Billets .....	1,800	3,800
Solid tube blooms .....	1,400	1,100
Bar iron:		
Hammered .....	2,400	2,100
Hot-rolled .....	21,800	11,800
Cold-rolled or cold-drawn ...	2,000	1,700
Rolled wire rod .....	3,500	6,100
Plates and sheets .....	1,700	1,400
Hollow blooms .....	1,500	1,900
Pipes and tubes:		
Cold-drawn .....	300	300
Other .....	800	400
Wire, drawn or cold-rolled ...	1,900	1,400
Nails and tacks .....	1,100	100
Horseshoe nails .....	1,800	500
<b>Total .....</b>	<b>98,600</b>	<b>90,900</b>

**BLAST FURNACES AND HEARTHES.**

The following table shows a number of blast furnaces and hearths existing and in operation during the first three months of 1917 and 1918:—

Blast Furnaces and Hearths.	1917.		1918.	
	Existing.	Running. Mar. 31.	Existing.	Running. Mar. 31.
Blast furnaces .....	131	106	139	109
Lancashire hearths .....	233	143	241	150
Bessemer furnaces .....	24	5	24	7
Open-hearth furnaces ...	83	60	87	56

**PRODUCTION.**

The following table gives the production of pig-iron, etc., in the first quarter of 1917 and 1918:

Articles.	Jan. 1-Mar. 31.	
	1917. Tons.	1918 Tons.
Pig iron (inclusive of directly produced castings) .....	202,800	206,600
Blooms and rough bars .....	23,100	28,100
Bessemer and Thomas ingots .....	15,500	14,300
Martin ingots (inclusive of scrapped castings) .....	127,000	112,300
Crucible ingots and electric ingots .....	—	2,200
Rolled and hammered iron and steel, ready for market .....	91,800	84,800

**SWITZERLAND.**

**CONTROL OF TRADE IN PRECIOUS METALS.**

The "Recueil des Lois Suisses" of 28th August publishes the text of a Decree of the Federal Council, dated 26th August, limiting commerce in precious metals to certain firms. This commerce will be under the control of the Department of Commerce and Customs, which will fix the maximum prices at which gold, silver and platinum can be sold.

The text (in French) of the Decree can be consulted at the Enquiry Office of the Department of Overseas Trade (Development and Intelligence)

## Textiles.

### JAPAN.

#### OFFICIAL INSPECTION OF SILK CREPE.

The Department of Agriculture and Commerce has announced that from 1st July official inspection will be enforced on silk crepe and "kabe" crepe for export purposes, with a view to developing the export trade in this particular line.

In this connection the authorities explain that since the outbreak of the war the shipments abroad of crepe and "kabe" crepe have shown considerable increase. Before the war the shipments did not exceed in value 800,000 yen a year, but the shipments last year amounted to 5,000,000 yen.

The export trade in this line was started some ten years ago. Upon the conclusion of the war the trade may decline, and this is the reason why the authorities have decided to enforce inspection on the exporters.

(Yen = 2s. 0½d. at par.)

### NETHERLANDS EAST INDIES.

#### SILK PRODUCTION.

According to an official report issued by the Minister of Agriculture in the Netherlands, new experiments are being undertaken to establish the silkworm industry in the Netherlands East Indies on a large scale.

The first step is the laying out of small mulberry plantations on suitable sites in Java, and perhaps also in other islands of the Archipelago, in order that a sufficient supply of mulberry leaves may be assured.

One of the Official Agricultural Instructors of the Netherlands East Indian Government is being sent to Japan, and afterwards to China and Indo-China, to obtain information about the industry, and to collect eggs of the moths of the various breeds. The native silkworm culture in Indo-China has lately been improved in a way which will probably be particularly suitable for the Netherlands East Indies.

### UNITED STATES OF AMERICA.

#### COTTON CONSUMPTION AND SUPPLIES.

The amount of cotton consumed in the United States during July, 1918, was 541,792 bales, compared with 537,823 bales for the corresponding months of 1917. The consumption for the year ended July 31, 1918, amounted to 6,591,336 bales, compared with 6,788,505 bales for the preceding year. The cotton on hand in consuming establishments on 31st July, 1918, was 1,465,384 bales, against 1,501,916 bales at the corresponding date last year; and the quantity in public storage and at compresses was 1,764,873 bales, against 888,257 bales last year.

These statistics, which were compiled by the United States Bureau of the Census, are given in running bales, counting round as half bales, except foreign cotton, which is in equivalent 500-pound bales. The monthly figures include 11,458 bales of foreign cotton and 5,705 bales of sea-island consumed, 62,714 bales of foreign and 20,001 bales of sea-island held in consuming establishments, and 48,213 bales of foreign and 36,494 bales of sea-island held in public storage.

Linters not included above were 106,361 bales consumed during July in 1918 and 85,733 bales in 1917; 138,342 bales on hand in consuming establishments on 31st July, 1918, and 112,972 bales in 1917; and 236,118 bales in public storage and at compresses in 1918, and 230,687 bales in 1917. Linters consumed during the 12 months ended 31st July amounted to 1,116,385 bales in 1918, and 869,702 bales in 1917.

#### IMPORT AND EXPORT OF COTTON AND LINTERS.

Imports of foreign cotton during July, 1918, reached 24,381 bales, an increase of 13,944 bales over the corresponding month of 1917. The imports for the year ended 31st July, 1918, were 220,596 bales, compared with 291,957 bales the previous year.

Shipments of domestic cotton and linters to foreign countries amounted to 218,877 bales during July, 1918, and 271,597 bales in 1917. For the year ended 31st July, 1918,

### TEXTILES—continued.

the exports were 4,476,124 bales, compared with 5,739,009 bales the preceding year. These figures include 16,802 bales of linters exported during July in 1918 and 19,176 bales in 1917, and 187,704 bales for the 12 months ending 31st July in 1918 and 436,161 bales in 1917.

The world's production of commercial cotton, exclusive of linters, grown in 1917, as compiled from published reports, documents and correspondence, was approximately 17,410,000 bales of 500 pounds net, while the consumption of cotton (exclusive of linters in the United States) for the year ending 31st July, 1917, was approximately 20,180,000 bales of 500 pounds net.—(*Commerce Reports.*)

#### THE USE OF KAPOK FIBRE.

Kapok, the fibre of the silk-cotton tree (*Eriodendron anfractuosum*) is imported into the United States in large quantities, principally from Java, and is used as filling for mattresses, pillows, cushions, life belts, and as an upholstery material. The Bureau of Census, United States Department of Commerce, at the request of the War Boards, issued a questionnaire to ascertain the amount of kapok fibre owned by importers and dealers and by manufacturers in the United States, and to locate these stocks. The statistics of kapok compiled by the Census Bureau comprise the data furnished on 22 schedules returned by importers and dealers and 291 returned by manufacturers in the United States. These schedules were received at the Census Bureau during June.

#### STOCKS AND CONSUMPTION.

The total stocks of kapok reported as owned May 1, 1918, by establishments in the United States were 10,133,499 pounds. Of this amount 2,845,017 pounds were on hand; 1,832,456 pounds in transit in the United States or Canada; 1,683,026 pounds in transportation on the high seas; and 3,773,000 pounds still abroad, principally in Java. The consumption of kapok fibre in the United States amounted to 8,472,830 pounds in 1917, compared with 5,815,041 pounds in 1916, or an increase of 45.7 per cent. The consumption from January 1 to May 1, 1918, was reported as 2,648,890 pounds, and the estimated quantity required for the remaining eight months of 1918 was 8,743,765 pounds, or an anticipated increase of 34.5 per cent. over 1917. Of the kapok consumed in 1917, 5,022,370 pounds were used for making 309,007 mattresses; 1,777,378 pounds for pillows, cushions, and pads; 237,730 pounds for 206,900 life preservers of various kinds; and 1,435,352 pounds for various other articles.

#### ESTABLISHMENTS USING KAPOK.

Manufacturing establishments in New York, New Jersey, and Pennsylvania together reported 3,961,903 pounds, or 65.9 per cent. of the whole amount owned by manufacturers on May 1, 1918. New Jersey reported by far the largest amount shown by any State. Of the New England States, Massachusetts reported the largest amount, 306,288 pounds. From the central section of the country 741,900 pounds were reported by Illinois and Ohio, most of it being owned in Illinois. On the western coast, California manufacturers owned 664,710 pounds. The quantities given as reported by the States mentioned above are stocks of 172 plants and amounted to 5,674,801 pounds, or 94.4 per cent. of the entire quantity of kapok reported as owned by manufacturers in the United States. Of the total pounds consumed between January 1 and May 1, 1918, these 172 establishments reported 2,362,910 pounds, or 89.2 per cent., while of the estimated consumption for the entire year 1918 they reported 10,612,172 pounds, or 93.1 per cent. This is a slightly larger proportion of the entire consumption than was reported by these States for the years 1917 and 1916, those being 90.5 per cent. and 90.2 per cent., respectively.

These plants manufactured more of the fibre into mattresses than any other article. There were 285,419 mattresses weighing 4,392,642 pounds made, while 1,615,223 pounds were made into pillows, cushions, and pads, and 237,730 pounds into life preservers. All the kapok used for life preservers was reported by these States, the great majority of it being used by manufacturers in New Jersey.



# The Central European Powers.

## GERMANY.

### WATER TRANSPORT.

#### WATERWAY FROM UKRAINIA TO THE BALTIC.

After the Lübeck Chamber of Commerce some months ago revived the old Russian plan of a waterway from Cherson to Riga, the Ukrainian Government in June took up the question of the proposed waterway from Cherson to Danzig or Königsberg, and decided to have plans prepared for the development of the Dneiper and to examine the possibilities for a connection to the Baltic. A commission was appointed, consisting of two engineers and an interpreter, which during July visited a number of Baltic ports and conferred with representatives of the Government, trade, industry, and navigation in Danzig and Königsberg, where detailed proposals for the development of the waterway were put forward. As a result of these conferences the Ukrainian Government has decided to proceed with the plans of all three routes, i.e., those to Riga, Königsberg, and Danzig respectively. The *Hamburgischer Correspondent* hopes that the German government authorities will devote special attention to these canal schemes, which it considers no less important for the future economic advantage of Central Europe than the Danube-Main waterway, for the preliminary operations of which one million marks were allotted last year. The *Kölnische Zeitung* points out that a ship canal to Danzig would afford the shortest connection between the Central and West German canal system on the one hand and the inland waterways of Ukraina on the other.

#### RHINE-DANUBE SCHEMES.

The Bavarian Government has allocated the sum of 2,000,000 marks for the execution of the plans for a ship canal from Aschaffenburg to the frontier of the Empire below Passau.

A meeting was held at Augsburg at the end of June, at which representatives of the communal authorities and of commercial, industrial and labour circles were present, to discuss the route to be followed in the Rhine-Danube connection. A resolution was adopted approving of the Bavarian Government's scheme for connecting the Main with the Danube via Aschaffenburg, Bamberg, Nuremberg, and Steppberg. If, however, the undertaking is to be supported by the Imperial authorities against the competitive schemes put forward by other districts, it is absolutely necessary that all local preferences within Bavaria itself should be subordinated, and unanimity attained within the State.

The promotion of the scheme for a Neckar-Danube canal was also urgently recommended to the assembly. This scheme, in furtherance of which a manufacturer, Dr. Robert Bosch, has given 1,000,000 marks, and towards which the Imperial authorities have granted a subsidy of 100,000 marks, is being promoted by the South-West German Canal Union. At the first regular meeting of members, held in Stuttgart at the end of June, the Wurtemberg Minister of the Interior stated that the Wurtemberg Government, in conjunction with the Governments of Baden and Hesse, has undertaken to prepare plans for the Neckar reach, while the Canal Union is undertaking those for the connection to the Danube and the Lake of Constance. From a lecture delivered by Dr. Kern (Mannheim) on the technical feasibility of constructing a waterway from the Rhine to the Danube via the Neckar, it appears that the original plan for a waterway capable of accommodating vessels of 600 tons only has been abandoned in favour of one accommodating vessels of 1,200 tons. This change involved an increase of the technical difficulties, especially with regard to the traversing of the Swabian Alp, but these difficulties have now been surmounted, and two routes via Geislingen and Ulm and one via Heidenheim have been found practicable. On 23rd July the Wurtemberg Lower House passed a resolution advocating a waterway connection between the Rhine and the Danube via the Neckar; the Minister of the Interior explained that the Government considered Wurtemberg's connection with the general canal system of Germany a necessary preliminary to the successful economic development of the State.—*Kölnische Zeitung*.

#### THE CENTRAL GERMAN CANAL.

At a meeting summoned by the Hamburg Union for River Navigation and the Union for the Improvement of Navigation Conditions on the Upper Elbe, during the second week of July, it was agreed that the construction of the section of the Central German Canal yet lacking, though, without doubt, distinctly disadvantageous to Hamburg, is neverthe-

### THE CENTRAL EUROPEAN POWERS—continued.

less necessary. The route adopted must therefore be one which will bring the city some advantages to balance the disadvantages, and this would mean the choice of the northern route (i.e., from Misburg, near Hanover, via Lehrte, Fallersleben, and Calvörde, to Heinrichsberg on the Elbe below Magedburg). The *Hamburgischer Correspondent* publishes very full particulars of the different schemes, and the amount of traffic which it is estimated will ensue.

Hamburg inland navigation circles are at present actively discussing a project for a new canal which is to traverse the Lüneburg Heath and connect with the Central German Canal by branch canals to Hamburg and Lübeck, the respective lengths being 150 km. and 190 km.—*Kölnische Zeitung and other journals*.

#### CANALISING THE RHINE.

A Rhine Navigation Congress, held in Basle early in July, attended by representatives of the Swiss Federal and cantonal authorities and all the Swiss navigation associations, and also by guests from Germany and Holland, expressed disapproval of the project for canalising the Rhine between Strassburg and Basle. The Congress was in favour of preserving a free navigable connection between Switzerland and the North Sea, and this object can be attained only by regulating the reach in question. A resolution was adopted requesting the Swiss Federal Council, in virtue of the Vienna Congress Act and the Rhine Navigation Act of 1863, to protest against the German project for the construction of power stations between Strassburg and Basle, and to preserve the international claims and just interests of Switzerland by the method of "objective explanation and friendly agreement." On the other hand, the Congress considered that the Rhine between Basle and the Lake of Constance should be canalised.—*Lokal Anzeiger*.

### INDUSTRY.

#### ADULTERATION OF SACCHARINE.

Private trade in saccharine and dulcine is forbidden in Germany by the Saccharine Law of 7th July, 1902. Recently the surreptitious traffic in saccharine and dulcine has assumed considerable dimensions, and advantage has been frequently taken of this fact to practice fraud. Preparations are frequently offered as saccharine which are not saccharine at all, but consist of sugar, carbonate of soda, gypsum, cement, etc., or are adulterated with such ingredients. This pretended saccharine is always sold at a very high price, many times the official price; and it is generally sold in original packages which have already been used, or fraudulent imitations of the official packages, or forged Swiss packages. The public are urgently warned against the alleged purchase of saccharine in surreptitious trade. The purchaser runs the risk not only of being swindled, but also of suffering considerable injury to health.—*Münchener Neueste Nachrichten*.

#### PENETRATION IN THE EASTERN OCCUPIED TERRITORIES.

On 9th and 10th August meetings of the Committees of the advisors and representatives of the Official Commercial Bureau (*Amtliche Handelsstelle*) of German Chambers of Commerce met at the offices of the Berlin Chamber of Commerce for a detailed discussion of their reports on the business situation in the occupied territories of the East. The directors of the 13 offices of the Bureau in the East reported that in the past year again the Bureau had succeeded in furthering in an active manner commercial relations between Germany and the occupied territories, so far as it was possible under the existing hindrances to export, and that it had also obtained large quantities of food, as well as other commodities important for the war economy, for the German people and the German troops. It had been decided, in order to centralise the examination of demands for permits and to remove import and export difficulties, to establish at the Berlin Chamber of Commerce a special office which would work in close contact with the Imperial Commissioner for Import and Export Licences, with the other Government Departments, and with the central offices in the occupied territories. In order to promote German trade more effectively, the Official Commercial Bureau has decided to maintain in Warsaw a permanent exhibition of all kinds of commodities, and has already secured the requisite premises. German firms which are able now to deliver export-free goods, or which want to create new connections for the transition of peace periods, can obtain further information from the Bureau offices at Warsaw on sending samples, catalogues or special offers. The meeting decided also to prolong the existence of the Commercial Bureau for another business year, to July, 1919.—(*Vossische Zeitung*.)

## THE CENTRAL EUROPEAN POWERS—continued.

## FINANCE.

## ROUMANIA AND GERMANY: EXCHANGE AGREEMENT.

The Bill for the establishment of a Roumanian Foreign Exchange Combine has been accepted in the Roumanian Parliament by 78 votes against 1. The Minister for Foreign Affairs stated that the Bill had its origin in a national interest. Roumania must connect her exchange with that of the Great Powers. "The law in question is a law for the protection of the national economic life, which is necessary at least for the duration of the present year. The Roumanian exchange is protected under favourable conditions; the agreement by which the German Imperial Bank undertakes to give us bills is a very advantageous financial operation. No one can doubt that the whole economic activity of Roumania in future will be directed to the Central Powers, especially to Germany. Germany will continue to buy Roumanian corn, and from Germany, not from England and America, we shall import everything that we require." The Minister concluded as follows: "All nations will in future live in good economic harmony. As for those who believe in the iron wall now recommended by the *Entente* as a measure for the economic isolation of Germany, let them know that after the war this wall will be shattered by the will of the nations, who desire to develop in peace."—*Munchner Neueste Nachrichten*.

## COAL SUPPLIES.

## PROVISION FOR THE WINTER.

The Greater Berlin Coal Office intimates that the large quantities of coal at present obtainable on the coal ticket are to be regarded as provision for the winter, and must therefore be used sparingly. This warning applies especially to households in Groups I, and II., whose total winter supply has now been released. New coal tickets will probably not be issued before the middle of 1919. A meeting of independent wood and coal dealers, attended also by representatives of the Imperial and municipal authorities for the coal supply, the railways, and the army, was recently held in Berlin, when complaints were made about the insufficiency and irregularity of deliveries, the inequality of prices and weight, and other matters. It was stated that from among 500 dealers, 160 received no supplies in June, and 50 per cent. of these received no briquettes in July. The quantity involved amounts to approximately 420,000 cwt. of coal. Other dealers received larger quantities than had been allocated to them. A resolution was passed requesting the Coal Combine to take steps to bring about a more even distribution.—*Berliner Tageblatt*.

## AUSTRIA-HUNGARY.

## INDUSTRY.

## POSITION OF THE CEMENT INDUSTRY.

The Austrian cement industry has had to face greater difficulties in the past year than earlier in the war, especially owing to lack of coal, but the financial interests are more favourable. Factories which paid dividends in 1916 have raised their rates, and others have again become paying concerns. The chief reason was that the official standard prices were fixed high enough to allow the making of a profit, in spite of the rapid rise in costs of production and the restricted utilisation of plant which resulted in an average production of scarcely 28 per cent. of the normal. This year difficulties are still greater; the new Economic Combine of the Cement Industry has not been able to overcome the coal shortage, so that large works which were still employed last year have had to close down. Meantime, cement prices have risen nearly 50 per cent., and hence it is likely that even this year shareholders will receive something.

The largest cement factory, the Perlmooser, made a profit of nearly 3,000,000 kronen last year, almost double that of the previous year, but less by  $\frac{3}{4}$  million than that of the last year of peace. The net profit, which in 1915 and 1916 fell to 12,000 and 77,000 kronen, rose in 1917 to 921,000 kronen, which, however, is only half the net profit of the record year 1912. The dividend was 8 per cent. in 1917 as compared with 15 per cent. in 1912, and nothing in 1915 and 1916.

The Königshofer Cement Factory after three years without dividends paid 8 per cent. in 1917; its gross profits, 2,450,000 kronen, were half a million higher than in 1913, and the net profit amounted to 727,000 kronen as against 21,000 kronen in 1916. The Austrian Portland cement factory in Szezakowa, far the most prosperous concern of the kind in Austria, paid over 20 per cent. in peace time. Thanks to superior coal supplies it has done better

## THE CENTRAL EUROPEAN POWERS—continued.

than the others, and only remained one year without dividend, paying 5 per cent. in 1916 and 15 per cent. in 1917. The value of the stocks has, however, in this case, in contrast to the other factories, fallen by 140,000 kronen to 725,000 kronen.

The Golleschau Portland Cement Factory failed to pay dividends for two years, and distributed 6 per cent. in 1917, and the Spalato Portland Cement Factory Company, after three years without dividend, paid 6 per cent. in 1917 against 12 per cent. in the last two years of peace.—(*Fremden-Blatt*.)

## LARGE EXTENSION OF THE FRIEDRICH BAYER CHEMICAL CONCERN.

The Dye Factories (formerly Friedrich Bayer and Co.) Company of Leverkusen is contemplating the building of large extensions in Leverkusen, for which it has already placed the contracts. One of the building contractors has already invited tenders for 30 million bricks. It is reported that artificial rubber and gum will be produced therein. The Company is already extensively engaged in the production of these commodities.—(*Vossische Zeitung*.)

## ECONOMIC COMMITTEE OF GERMAN PEACE INDUSTRIES.

The *Munchner Neueste Nachrichten* publishes some particulars of the work of the Economic Committee of German Peace Industries, which was founded to prevent the interests of these industries being neglected in favour of the specifically war industries represented by the War Committee of German Industry. The movement arose out of the inadequate consideration shown to the peace industries in the provisions of the Patriotic Auxiliary Service Law. Further reasons were the necessity for representation in the War Office (which has been granted), and the uncertainty with regard to the war extortion law, the unequal administration of which gave rise to many complaints. It is owing to the action of the Economic Committee that the opinion of experts in any industry in question is now taken before decisions are arrived at under this law. The Committee devotes special attention to the shortage of coal and to complaints of insufficient allocation; for in view of the resumption of commercial relations with the East, especially with Ukraina, it is necessary to have sufficient products of the peace industries to exchange against Ukrainian products of the soil.

The industries combined in the Economic Committee are largely the same as those represented at the Leipzig Fair, among which a prominent place is held by the ceramic, glass, and toy industries. Their importance lies in the fact that they produce not only for civilian requirements in war-time, but largely for *post-bellum* demand. They are pre-eminently export industries, and represent the remnants of the German export trade, which it is essential not to surrender if every basis for a later reconstruction of German world trade is not to be lost.

## SYNDICATION.

## ECONOMIC COMBINE OF METAL INDUSTRY AND METAL GOODS MANUFACTURERS.

Two Orders of the Austrian Minister of Trade, dated 22nd and published on 27th July, provide for the establishment of two Economic Combines, one of the Metal Industry, the other of the Metal Goods Manufacturers. As since the beginning of the war the metals needed to supply the army have been requisitioned by Order and allocated to the industries working on army account by the Central Metal Company, the chief function of the new Combines is to make preparations for the transition period and the regulation of trade during that period. The grouping of the metal industry and metal goods manufacturers into self-governing Combines, which will keep the Government informed on questions affecting these branches of production, is of special importance, as Austria is not rich in metals. Hence it is impossible to dispense with a systematic distribution of available quotas and the co-operation of the industry in obtaining metals from abroad. The Combines will co-operate in supplying the members with raw and auxiliary materials, in regulating production, sale, prices, etc. Fundamental measures require the approval of the Minister of Trade. The Economic Combine of the Metal Industry includes the aluminium factories, smelting works, electro-metallurgical industry, and other industries in which aluminium, lead, copper, tin, or zinc are produced, or nickel in so far as it is not intended for the improvement of steel; also those industries which convert these metals or their alloys into half-manufactured articles. To the Combine of Metal Manufacturers belong all undertakings which manufacture goods exclusively or mainly composed of metals. Goods made of gold and silver or iron and steel, and semi-manufactured goods, are not included.—(*Wiener Zeitung*.)

**THE CENTRAL EUROPEAN POWERS—continued**

**SYNDICATION OF THE MINERAL OIL INDUSTRY.**

An Order of the Hungarian Minister of Trade provides for the compulsory syndication of all undertakings now or in the future engaged in manufacturing mineral oil products from crude oil. All such must become members of the Mineral Oil Industry Combine, the object of which is to control production under the direction of the Minister of Trade. The Combine is under State supervision, which is exercised through Commissioners appointed by the Ministers of Trade, Finance, and Agriculture. The Commissioners must be invited to every meeting of the Board, the Executive Committee, and the General Assembly, and any decision to which they raise objection must be referred to the Minister of Trade. The Board can inflict fines up to 50,000 kronen on any member who fails in his duty to the Combine by neglecting to conform to the prescribed plan of operation, resisting control, etc. The Order comes into force at once. It does not extend to Croatia and Slavonia.—(*Pester Lloyd*.)

**SYNDICATION OF THE HUNGARIAN MATCH INDUSTRY.**

An Order of the Hungarian Minister of Trade provides for the establishment of a compulsory Combine of the Match Industry, with offices in Budapest. Every match factory is a member of the Combine. The objects are the acquisition and distribution of raw materials, control of trade in matches, and the execution of the Orders of the Minister of Trade concerning requisition, prices, export, and import. The Order does not extend to Croatia and Slavonia.—(*Pester Lloyd*.)

**RECENTLY-FOUNDED SOFIA STOCK EXCHANGE IN SOFIA.**

A stock exchange was opened at Sofia on 21st January, 1918. During the first six months the membership increased from 56, the number first registered, to 77, including all the banks, bankers, several merchants, and trading companies.—(*Norddeutsche Allgemeine Zeitung*.)

**TEXTILE SUBSTITUTES.**

**FOUNDATION OF A CELLULON COMPANY.**

The Austrian Cellulon Company, Limited, is being formed, under the Union Bank, for the manufacture of cellulon by the Türk process in Austria and Hungary.—(*Wiener Zeitung*.)

**COAL AND IRON.**

**INCREASED COSTS OF PRODUCTION IN THE AUSTRIAN IRON INDUSTRY.**

The standard prices for iron, which were fixed a few weeks ago, are to be revised again in September. These prices already exist only on paper and are observed only by the two leading undertakings of the North, which are specially favourably situated in the Ostrau district. The rise in costs of production makes the standard prices impossible for other concerns to observe. One of the chief causes of this rise is the increase of wages. The recent concession to the metal workers, which for the moment affects only Lower Austria, means a rise of 30-40 per cent. in the wages of 300,000 workmen: its extension to the factories in other provinces is estimated to cost 800,000,000 kronen. In the Ostrau coal fields the wages of 41,000 workmen amounted to 54,000,000 kronen in 1914, while the wages of 44,000 persons amounted to 86,000,000 kronen in 1917. The difference between the buying and selling prices of provisions for workmen in the same region cost the employers some 300,000 kronen per month in 1916; the cost is now 2,500,000 kronen per month. The cost of coal is another serious item for concerns which do not possess their own mines. A small steel-works paid for Ostrau small coal 14 kronen in 1914, and pays now 45-50 kronen; for Upper Silesian coal it paid 16-75 kronen in 1914 and now pays 50 kronen. The price paid by the same works for pig-iron has gone up from 8-50 kronen before the war to 30 kronen. Undertakings which employ a large staff, such as railways, suffer especially from having to make large payments in relief of their workpeople. The Aussig-Teplitz line for the first time has paid no dividend; its expenditure for war relief purposes rose by 73 per cent. in 1917 as against 1916. The working expenses of the Südbahn increased from 100 millions before the war to 193 millions in 1917. Economy in production is affected by such factors as the changes necessitated by the shortage of materials, irregularities caused by the governmental interference with coal stocks, and the use of worn-out machinery.—(*Neue Freie Presse*.)

**HUNGARY: REDUCED OUTPUT OF COAL.**

According to official statements the Hungarian output of coal and lignite in the first half of 1918 amounted to 44,484,140 metric cwt., showing a decrease of 1,951,540 metric cwt. as compared with the first half of 1917.—(*Neue Freie Presse*.)

**Customs Regulations and Tariff Changes.**

**BRITISH EMPIRE.**

**CANADA.**

**"FRENCH CONVENTION ACT, 1908," TO BE TERMINATED.**

A Memorandum (No. 2233) has been issued by the Canadian Department of Customs, dated 15th August, 1918, notifying that under Article XX of the French Convention Act, 1908, notice has been given for terminating the said Convention on 14th May, 1919.

Under the terms of this Convention a large number of French and French Colonial products are entitled to entry into Canada at the Intermediate Tariff rates of the Canadian Tariff or at rates specially provided for in the Convention, and, reciprocally, many articles of Canadian origin may be imported into France and the French Colonies and Possessions at the Minimum Tariff Rates or at the lowest rates of Customs duty applicable to like products of other foreign origin.

**PROHIBITED EXPORTATION OF CASEIN.**

It is stated in Customs Memorandum No. 2234 B, issued by the Canadian Department of Customs on 20th August, that an Order in Council was passed on 17th August, 1918, prohibiting the export of Casein or Lactarene to all destinations outside of Canada, except under license issued by the Commissioner of Customs at the request of the War Trade Board.

**CEYLON.**

**FREE EXPORTATION OF COPRA AND COCONUT OIL.**

The "Ceylon Government Gazette" of the 5th July contains copy of a Notification dated 4th July, 1918, stating that on and after 3rd July, 1918, and until the duty is reimposed, shipments of copra and coconut oil will be allowed free of export duty. Under previous Notifications, the export duty on such goods, although suspended, had to be paid at the time of export, and application made to the Principal Collector of Customs for a refund of the duty.

**EGYPT.**

**IMPORT TARIFF VALUATIONS: COTTON YARNS.**

The Egyptian "Journal Officiel" of 5th August, 1918, contains a list of revised tariff valuations (No. 32) for use in assessing duties on cotton yarns imported into Egypt from the 5th August to the 4th October, 1918, or until denunciation, as follows:—

Articles.	Import valuations per kilogramme (2.2046 lb.). *millièmes
Cotton single yarns, grey and bleached—	
From India—	
Nos. 4 to 12 .....	236
Nos. 14 to 20 .....	300
From other countries—	
Nos. 4 to 12 .....	430
Nos. 14 to 20 .....	443
Knittings	
From India—	
Nos. 3 to 12 .....	306
From other countries—	
Nos. 3 to 12 .....	470
Cotton sewings, grey or bleached—	
From India .....	475
From other countries .....	514
Cotton doubled yarns, grey and bleached,	
Nos. 40/2 .....	609
Cotton cable yarns, No 20 .....	609
Turkey red cotton single yarns .....	568
Other coloured cotton single yarns .....	568
Gassed or mercerised or prepared yarns, grey, bleached or dyed—	
From India .....	<i>ad valorem.</i>
From other countries .....	<i>ad valorem.</i>

NOTE.—The tare allowance for bales is fixed at 3 per cent. Duty is leviable on the valuations shown at the rate of 8 per cent.

\*1,000 millièmes = £E.1 = £1 0s. 6d.



CUSTOMS REGULATIONS AND TARIFF CHANGES—  
continued.

NEW ZEALAND (Cook Islands).

EXPORT DUTIES.

The "New Zealand Gazette" of 11th July contains copy of an Order in Council dated 24th June, 1918, stating that the following export duties shall come into operation in the Cook Islands on 1st August, 1918, viz.:—

Export duties:—

Copra .....	Per ton.	£1.
Pearl shell .....	Per ton.	£4.

MALAY STATES (Kelantan).

AMENDED CUSTOMS TARIFF.

The Board of Trade have received from the High Commissioner's Office, Singapore, copies of various Government Notices amending the rates of import and export duties in the State of Kelantan. Under Government Notice No. 12 the following import duties have been imposed, with effect from 23rd April, 1918, viz.:—

Article.	Rate of Import Duty.
Silk goods manufactured .. .. .	ad val. 10 per cent.
Arms, ammunition, etc .. .. .	" 10 "
Motor cars, cycles and accessories .. .. .	" 10 "
Woodenware, furniture and cabinetware .. .. .	" 10 "
Brass and copper ware .. .. .	" 10 "
Budu .. .. .	per jar 6 cents.
Chillies .. .. .	ad val. 3 per cent.
Samsu .. .. .	per gall. \$3.75.
Bamboo and rattan ware .. .. .	ad val. 10 per cent.
Stationery .. .. .	" 3 "
Boats .. .. .	" 10 "
Jewellery .. .. .	" 10 "
Tobacco unmanufactured .. .. .	" 25 "
Sugar .. .. .	per picul \$2.
Gambier (ordinary) .. .. .	per basket 50 cents.

The following export duties have also been imposed under various Government Notices, viz.:—

Article.	Rate of Export Duty.
Hides .. .. .	per picul \$1
Dried fish, small .. .. .	" 25 cents.
Fowls .. .. .	Each 8 cents.
Padi .. .. .	per 100 gantangs 50 cents.
Rice .. .. .	" 60 cents.
Cattle (by sea) .. .. .	per head \$3.

NOTE.—The gantang = 1 gallon: the picul = 133½ lb.

FOREIGN.

ARGENTINA.

CONSULAR CERTIFICATION OF INVOICES OF  
GOODS NOT INCLUDED IN THE  
VALUATION TARIFF.

The Board of Trade are in receipt, through the Foreign Office, of copy and translation of an Argentine Presidential Decree, promulgated in the "Boletín Oficial" for the 4th July, which provides as follows:—

**Article 1.** When it is desired to clear, or warehouse in the (Customs) warehouses, goods which (as they are not included in the Tariff of Valuations) are governed by the terms of Articles 12 *in fine*, 15 and 22 of Law No. 4933, the original invoice bearing the certificate of the Argentine Consul at the place of origin as to the correctness of the prices contained therein, must be handed in with the other documents.

**Article 2.** Consuls-General, Consuls, Vice-Consuls, and employees who temporarily exercise the powers of such officials, must certify to the correctness of the prices placed against the goods in the original invoices, provided that the interested parties supply the evidence necessary to enable them to check such prices.

**Article 3.** When such officials have not sufficient means of ascertaining the correctness of the prices they shall limit themselves to certifying the authenticity of the signature on the invoice, and shall record the fact that they are unable to check the prices; they may also, if they consider it necessary to do so, enter what they consider is the true value of all or any of the goods detailed in the invoice.

**Article 4.** Consular officials, and employees temporarily acting for them, shall be responsible both civilly and criminally

CUSTOMS REGULATIONS AND TARIFF CHANGES—  
continued.

nally for all false certificates issued while complying with the duty laid upon them by the present Decree.

**Article 5.** The said officials shall apply the terms of paragraph 46 of Article 1 of Law No. 4280 for the visa on original invoices, i.e., they shall charge a fee of 4 pesos gold [equal to 15s. 10½d.] for such service.

When they certify to the value assigned to goods detailed in an invoice they shall charge, in addition to the above-mentioned fee, a supplementary fee of 10 centavos gold [approximately 5d.] for each lot (*partida*) of goods of the same kind and quality for which they have to certify the price.

**Article 6.** The Appraisers selected for examining goods in the condition mentioned in Article 1 (without prejudice to their right of appraising the true value of the goods detailed in the invoice certified by the Argentine Consular official), shall investigate the correctness of what is added by way of freight, insurance and other ordinary charges incurred up to the time when the goods enter the (Customs) warehouses. When found correct, they shall give clearance to the goods in the usual way.

**Article 7.** If the value of the goods is, in the opinion of the Appraisers, greater than that stated in the invoices certified by the Consuls, and if this discrepancy authorises the general procedure laid down in Article 134 of the Customs Regulations, they shall notify the matter in the form prescribed in Article 1039 of the Regulations, but shall not delay clearing the goods. They shall, however, retain a sample of the goods, and make a statement to that effect in the clearance document, and have it signed by the interested party.

**Article 8.** When the Administrator of Customs has received the notification, he shall cause the question of value (together with the sample) to be referred to two appraisers for the particular class of imports concerned. If their opinion agrees with that of the Appraisers who intervened in the clearance of the goods, a report on the matter shall be sent to the Ministry of Finance, with a copy of the original invoice, viséed by the Consul, for the purposes of Article 4.

**Article 9.** Goods not included in the Tariff (of Valuations) which are presented for clearance with an invoice not bearing the Consular Certificate as to the prices entered therein shall be dealt with in accordance with the general provisions of the Customs Regulations and the Customs Law. In this case, the invoices shall have no other validity than that which may result from the independent investigation, by the Customs Appraisers, of the declared values of the goods.

**Article 10.** The Customs shall not take into account in any way invoice prices, even when certified by an Argentine Consul, if the goods mentioned therein are classified in the Tariff. In such case, the goods must be valued and cleared under the relevant heading in the Tariff.

[NOTE.—The following is a translation of Articles 12, 15 and 22 of Law No. 4933 (the Tariff Law) to which reference is made in Article 1 of the foregoing Decree:—

**Art. 12.**—The import duties shall be assessed according to a Valuation Tariff established by taking as a basis the price of the goods in warehouse.

The duties leviable on goods not included in the Valuation Tariff shall be calculated on the value declared by the persons who clear the goods (*despachantes*), substantiated by means of the original invoice.

**Art. 15.**—Goods of foreign origin not enumerated in the Tariff shall pay the duty established therein for goods of the same kind, and according to their value in warehouse, as declared by the importer. Should it be impossible to assimilate them to any of the goods comprised in the Tariff, they shall be subject to the general duty of 25 per cent. on their value in warehouse, declared in the manner aforesaid.

**Art. 22.**—In the cases mentioned in the preceding Article 12, as well as in all others provided for in the Tariff, in which the *ad valorem* duty is leviable on goods which are not officially valued, the declared value shall include the price (*precio de costo*) in the port of shipment, substantiated by the original invoices, and augmented by the freight charges, insurance premiums and other ordinary expenses incurred up to the time of the entry of the goods in the Customs warehouses at the port of discharge.]

EXPORT DUTY ON DRIED CATTLE HIDES.

With reference to the notice at page 346 of last week's issue of the "Board of Trade Journal" respecting the modifications, for the month of September, in the schedule of Argentine export duties H.M. Minister at Buenos Aires reports that the export duty on dried cattle hides for the month is 6.94 pesos (gold) per 1,000 kilogrammes.



CUSTOMS REGULATIONS AND TARIFF CHANGES—  
*continued.*

MEXICO.

CUSTOMS DUTIES ON BEER AND CIDER.

The Board of Trade are in receipt, through the Foreign Office, of a translation of a Mexican Presidential Decree, dated the 20th July, which modifies paragraphs 579 and 571 of the Mexican Tariff as shown in the subjoined statement. The new duties were to take effect on the 22nd July.

Tariff No.	Revised Classification.	Rate of Duty.			
		Former.		New.	
		Pesos.	cts.	Pesos.	cts.
570	Cider in bottles . . .			0	30
570A	Beer in glass or earthenware bottles	0	30	0	95
		<i>Per kilog. gross wt.</i>		<i>Per kilog. legal</i>	
571	Cider in barrels . . .			0	20
571A	Beer in barrels . . .	0	20	0	06
		<i>Per kilog. gross wt.</i>		<i>Per kilog. gross wt.</i>	

NETHERLANDS.

CUSTOMS DECISIONS.

The Board of Trade are in receipt, through the Foreign Office, of a translation of a Decree of the Netherlands Minister of Finance, dated the 30th July, containing a number of decisions respecting the classification of imported goods for Tariff purposes. The more important of these decisions are noted below:—

All parts of pneumatic drilling hammers used in the mining industry, including separately imported air-cocks and bore-bits, can, on importation, be classed with duty-free "Factory machinery," provided that it is proved to the satisfaction of the examining officials—if desired, by the production of drawings, orders and further documentary evidence—that the objects are indeed parts of drilling hammers driven by air pressure.

Paddle wheels and turbines of mills driven by water can, like the vanes, wind-arms and shafts for windmills, be classed with duty-free "Factory machinery."

Hydrokineters, a kind of feed-heaters for boiler-water, intended to heat that water as quickly and evenly as possible by injecting steam from another boiler, may not be regarded as governors and safety-appliances (which are dutiable when imported separately), but as duty-free parts of "Steam machinery."

Connecting-pieces for gas pipes and other pipes consisting of three parts, of which the middle one, and, at any rate, one of the end parts are hexagonal on the outside, and which, after the middle piece has been screwed up, fit into one another in such a manner as to form a continuous tube, the ends of which are furnished with female screwthreads, cannot be classed with duty-free cast or drawn iron gaspipes, but are subject, as "Ironwork," to an import duty of 5 per cent. *ad valorem*.

Wire-bending pliers, known by electricians and other artificers as "champagne pliers," should be classed with duty-free "Tools."

Silk violin strings should be admitted free of duty.

Magnesium powder should, on importation in small packets with directions as to its use, and further requisites for obtaining magnesium light, be subject as "Small wares" to an import duty of 5 per cent. *ad valorem*. If otherwise imported, it is free of duty.

Laths for frames, stained, but otherwise only sawn and planed, should, as such, be subject to an import duty of 5 per cent. *ad valorem*. Veneering wood in sheets, stained, but not further manufactured, may on the other hand be admitted free of import duty.

Boiler tubes.—As a rule only ungalvanised, seamless iron pipes, or iron pipes welded with an overlap, with a diameter, on the outside, of from 20 to 125 millimetres, and a thickness of from 1 to 10 millimetres, are used as fire tubes and boiler tubes. Other tubes, when imported, can only be considered as duty-free fire tubes and boiler tubes if at the time of the Customs examination it is proved to the satisfaction of the examining officials by means of documents that they will indeed be used as parts of a boiler.

Steel wool, used, for instance, for cleaning parquet floors, may be admitted free of import duty in any packing.

Iron appliances, known as "sandlers," "matbeaters," or "punches," used for roughening or dulling wood-carving or sculpture work, may be classed with duty-free "Tools."

Emetine hydrochloricum, the hydrochloride of emetine, used for the preparation of injections, an alkaloid of the ipecacuanha root, may be admitted free of import duty in any packing.

CUSTOMS REGULATIONS AND TARIFF CHANGES—  
*continued.*

Drilling apparatus used for cleaning tubes of boilers and evaporators, may be classed with duty-free "Factory machinery."

Transport screws (worm screws, jacks and disks), although driven by mechanical force may not be regarded as duty-free "Factory machinery" if they do not perform any other function than the transporting in a horizontal direction of goods from one reservoir or machine to another. They may be so regarded if the transport screws are used, for instance, also as the driving shaft of a machine, or if the transportation of the goods has to serve at the same time to cool them down, heat, mix, divide, sort them, etc. The above rule also applies to the cases, vats, troughs or gutters encasing the screws themselves.

Iron powder, purified by means of alcohol, used for medical purposes, and known as "ferrum limatum alcoholisat. pur.," may be admitted free of duty in any packing.

Peach nut oil, used as a substitute for sweet almond oil, being a fatty saponifiable oil, is subject, as "oil not separately tariffed," to an import duty of fls. 0.55 per 100 kilogrammes.

Anethol (*p. propenylanisol*), a substitute for aniseed oil, should be classed with fragrant oils, dutiable at 5 per cent. *ad valorem*.

Strawberry pulp, raspberry pulp, and other fruit pulp, being the residue remaining after the fermentation and boiling down of fruits, and which is used for the manufacture of jams, is subject, as "Fruits," to an import duty of 5 per cent. *ad valorem*.

The medicine "Neo Salvarsan" may be admitted free of duty in any packing.

Caramel extract, an aqueous solution of caramel, should, like caramel, be subject to an import duty of fls. 6 per 100 kilogrammes

Government Notices  
affecting Trade.

EXPORT SECTION.

EXEMPTIONS FROM STEEL REGULATIONS.

The Director of the War Trade Department draws attention to the following revised list of articles which may be exported without production to the Customs Authorities of a Steel Exemption Certificate from the Cutlers' Company (or Chamber of Commerce), provided they do not fall within the terms of any specific export prohibition, such as (a) the prohibitions affecting the export of articles made from steel containing tungsten, molybdenum, chrome, cobalt, nickel or vanadium, or (b) such other headings in the list of prohibited exports as those affecting copper manufactures, malleable hematite iron castings, articles wholly manufactured of steel or iron wire, etc. Where the goods fall within such prohibitions a Privy Council licence will, of course, be necessary.

The revised list does not apply to any goods exported to Norway, Sweden, Denmark or Holland, as a licence is necessary for all exports to those destinations.

Also a licence is necessary for the export to Switzerland of any article mentioned in the special prohibited list applicable to that country contained in the Royal Proclamation of 25th June, 1918, as amended by any subsequent Order of Council.

Copies of the list of export-prohibited goods can be obtained on application to the Secretary of the War Trade Department, 4, Central Buildings, Westminster, S.W. 1, or to the Department of Overseas Trade (Development and Intelligence), 73, Basinghall Street, London, E.C. 2.

- Balances, spring, for domestic purposes.
- Bands, steel, for walking sticks and umbrellas.
- Box irons and sad irons for domestic and laundry purposes.
- Caps, steel, for tobacco pipes.
- Clips, steel, for penholders, pencil holders, letters and papers, and for photographic purposes.
- Clips, steel, for umbrellas, hats, trousers, and clothing generally.
- Coffee and maize handmills for domestic and shop use.
- Compasses for school use.
- Corset shields, steels and busks.
- Crochet hooks.
- Cutlery, table.
- Dishes, steel, for photographic purposes.
- Domestic weighing machines and spring balances.
- Drawing instruments, steel, for school use.
- Drums, steel, when used as containers for goods.

GOVERNMENT NOTICES AFFECTING TRADE—*continued.*

Electricity meters, the following:—

- Ammeters.
- Ampere-hour meters (house service).
- Ampere-hour meters (switchboard).
- House service meters.
- Idle current meters.
- Indicating wattmeters.
- Induction instruments.
- Induction relays.
- Integrating meters (house service).
- Integrating meters (switchboard).
- Meters (house service).
- Meters (power factor).
- Meters (switchboard).
- Power factor meters.
- Prepayment meters.
- Relays.
- Synchrosopes.
- Time switches.
- Time-limit relays.
- Traction meters.
- Two-rate meters.
- Voltmeters.
- Wattmeters.
- Watt-hour meters (house service).
- Watt-hour meters (switchboard).

- Eyeglass frames.
- Ferrules, steel, for walking sticks or umbrellas.
- Fittings, steel, for wearing apparel.
- Fittings, steel, for writing desks.
- Fruit crushers for domestic and shop use.
- Gate hooks.
- Gate hinges.
- Handmills for domestic and shop use.
- Hinges for gates, doors (except railway carriage doors), shutters, windows, and articles of furniture.
- Irons for domestic and laundry purposes.
- Keys.
- Knives.
- Latches.
- Locks.
- Manicure sets.
- Meat mincers, hand, for domestic and shop use.
- Mouse traps.
- Nibs.
- Paint scrapers.
- Pencil holders.
- Penholders.
- Pens.
- Print cutters, steel, for photographic purposes.
- Razors.
- Razor blades (including safety razor blades, but not frames).
- Rabbit traps.
- Rat traps.
- Rickshaws and their parts.
- Roller skates.
- Scissors.
- Sewing machines (domestic).
- Shelf brackets.
- Spectacle frames.
- Spring balances, domestic.
- Tacks.
- Thimbles (domestic).
- Toys, steel.
- Trinkets for personal wear.
- Trouser stretchers and fittings.
- Umbrella ferrules, notches, catches, clips and handle bands.
- Weighing machines, domestic.
- Whips.

All steel manufactured goods not otherwise prohibited in which the steel is less than 5 per cent. of the total weight.

N.B.—This Notice cancels all previous notices and lists on this subject.

GOVERNMENT NOTICES AFFECTING TRADE—*continued.*

## TEXTILE SECTION.

## THE WOOLLEN AND WORSTED (CONSOLIDATION) AMENDMENT No. 3 ORDER, 1918.

The Army Council have made, under date 7th September, an Order as follows:—

Whereas by the Woollen and Worsted (Consolidation) Order, 1917, as amended by Orders made by the Army Council on 23rd March, 17th May, and 2nd August, 1918, the Army Council regulated upon certain conditions the production of goods of which Wool or any derivative thereof, of Mohair, Alpaca, Cashmere, or Camel-hair is a constituent part.

And whereas it is expedient that the said Order should be amended:

Now, therefore, the Army Council, in pursuance of the powers conferred upon them by the Defence of the Realm Regulations, hereby order that the Woollen and Worsted (Consolidation) Order, 1917, shall be amended as follows:—

(1) In Clause 4 the word "Noils" shall be inserted after the word "Tops."

(2) The following Clause shall be inserted next following after Clause 6:—

"(7) No person, the business carried on by whom consists wholly or partly in the production of goods of which wool or any derivative thereof or Mohair, Alpaca, Cashmere, or Camel-hair is a constituent part shall, except under permit issued by or on behalf of the Director of Wool Textile Production, put into manufacture at any time after 30th November, 1918, any Noils made from Merino, British or Colonial, Crossbred or Persian Wools, otherwise than for any purpose referred to in Clause 3 hereof."

And the said Order may be printed with the remaining Clauses of the said Order numbered consecutively from Clause 8 to Clause 23 respectively.

(3) The following clauses shall be inserted next following after Clause 8 of Schedule "A" annexed to the said Order.

"(9) The basis of distribution as between individual manufacturers of wool felt hats shall be the consumption for civil orders in 1916 and the average number of forming cards effecting such consumption. The requirements of machinery engaged on Government work in each period shall be deducted."

"(10) The basis of distribution as between individual manufacturers of felt other than that required for wool felt hats shall be the consumption for civil orders in 1916 and the average number of inches in the carding sets effecting such consumption. The requirements of machinery engaged on Government work in each period shall be deducted."

(4) The following Clause shall be inserted next following after Sub-Section (d) of Clause 13 of the said Schedule:—

"(e) Export Yarn Rationing Certificates for hand-knitting and mending yarns will in the majority of cases be issued to spinners only. Any merchants exporting such yarns will obtain the number of the Export Yarn Rationing Certificates from the Spinner and will quote such number in his application for an export licence. Delivery certificates and monthly returns of deliveries will not be required from merchants in respect of handknitting and mending yarns."

"Application for Export Yarn Rationing Certificates will only be made by the merchant when the yarn is already in his stock or when it is obtained from a spinner who holds no export yarn rationing certificate for the particular destination."

(5) The following words shall be added to Sub-Section (1) of Clause 20 of the said Schedule:—

"i.e. (in addition to Tops), all Fleece skin or slipped wools which have not been through any process of manufacture."

And the said Schedule may be printed with Clauses 9 to 20 numbered as Clauses 11 to 22 respectively.

(6) This Order may be cited as the Woollen and Worsted (Consolidation) Amendment No. 3 Order, 1918.

GOVERNMENT NOTICES AFFECTING TRADE—*continued.*

## RETURNS UNDER CLOTHING (RETURNS) ORDER, 1918.

Under the Clothing (Returns) Order of 24th July, 1918, which appeared on p. 297 of the "Board of Trade Journal" of 27th August, the Director of Army Contracts requires all persons engaged in the manufacture of clothing (other than shirts, pyjamas, underclothing and hosiery), not later than the seventh day of each month, if and when their average weekly output in their own factories or workshops during the preceding month has exceeded 100 completed garments of such clothing, to send in to the Director of Army Contracts, Room C.53 B., War Office (Contracts Department), Grosvenor Road, London, S.W. 1, a statement of particulars, showing the quantities of overcoats, jackets, trousers, waistcoats, pantaloons and other garments for male and female wear that have been manufactured or partly manufactured by them in their own factories or workshops during the said month for the War Office and other purposes. Copies of the Schedule on which the return is to be made should be obtained from the Director of Army Contracts at the above address.

As far as possible schedules have been sent out to firms known to the Department, but if copies have not been received application should be made.

The first return under this requirement was due to be rendered by 7th September, 1918, in respect of the month of August, 1918.

## GENERAL SECTION.

SENIOR MERCANTILE MARINE OFFICERS.  
COMPULSORY COURSE OF TRAINING.

The Lords Commissioners of the Admiralty, in exercise of the powers conferred upon them by No. 37 of the Defence of the Realm Regulations, have made, under date 12th September, the following Regulations:—

1. Every Officer of and above the rank of Second Officer of every British merchant vessel of 1,000 tons gross tonnage and upwards, which trades or is likely to trade in any area in which enemy submarines may be encountered, and any person hereafter appointed to be one of the said Officers of any such vessel, shall attend any course of instruction in the precautions necessary to be observed against enemy submarines at such time and place as may be directed by the Admiralty or by any Naval Officer authorised by the Admiralty to give such directions, subject in the case of officers of alien nationality, to the approval of the Admiralty of their attendance at any such course.

2. Every owner of any such vessel, and where such owner is a company, the managing director or other responsible officer of such company, shall give facilities for the attendance of the said Officers in accordance with any directions given hereunder, and shall forward to the Admiralty from time to time such information regarding the said Officers as the Admiralty may require.

3. If any such Officer of any such vessel to whom directions have been given hereunder fails or neglects without reasonable cause to comply therewith, he shall not proceed to sea in the capacity of an Officer as aforesaid until he has obtained permission of the Admiralty or of some Officer authorised by the Admiralty to give permission.

The Admiralty Order published in the "London Gazette" of 14th May, 1918, is hereby cancelled.

## INSTRUCTION RESPECTING LAUNDRY WORK.

The Road Transport Board, pursuant to Par. 1 of the Road Transport (No. 2) Order, 1918, have issued, under date 13th September, the following Instruction:—

Where laundry work is collected or delivered by a vehicle to which Regulation 233 of the Defence of the Realm Regulations applies, such work must be collected and delivered on the same day, and no customer may be visited on more than one day per week without the leave of the Divisional Road Transport Officer. This instruction does not apply to laundry work for hospitals.

This Instruction shall take effect as from 1st October, 1918.

\*Regulation 233 applies to all vehicles capable of being used for road transport which are not used wholly or mainly in agriculture.

GOVERNMENT NOTICES AFFECTING TRADE.—*continued.*

## THE QUEBRACHO (DEALINGS) ORDER, 1918.

The Army Council have made, under date 10th September, an Order, as follows:—

1. No person shall, without a permit issued by or on behalf of the Director of Raw Materials, purchase or sell any solid quebracho extract.

2. This Order may be cited as the Quebracho (Dealings) Order, 1918.

## NEW LIST OF CERTIFIED OCCUPATIONS.

The Secretary of the Ministry of National Service makes the following announcement:—

A new List of Certified Occupations was issued on the 17th September under reference R.136 (Revised), superseding the former List R.136. The revised List comes into force on the 26th September, 1918. The former distinction between single and married men has been discontinued; a shorter period of qualification has been fixed; and numerous alterations have been made as to the occupations which are certified and the ages to be attained to qualify for inclusion.

With a few exceptions the List covers all men of the new military age of all medical grades who are engaged in the occupations mentioned in the List, including directing heads of businesses, managers, and departmental managers.

A man claiming to be in a certified occupation must show—

(i) that from the 1st January, 1918 (instead of 15th August, 1915) he has been employed or engaged at his principal and usual occupation in an occupation named in the List, and

(ii) that he complies with the conditions as to year of birth and medical grade which apply to his particular occupation.

Copies of the List may be obtained from H.M. Stationery Office at any of the following addresses, either directly or through any bookseller or newsagent:—Imperial House, Kingsway, London, W.C. 2; 28, Abingdon Street, London, S.W. 1; 37, Peter Street, Manchester; 1, St. Andrew's Crescent, Cardiff; 23, Forth Street, Edinburgh. The price of the List is 1d.; post free, 1½d.

## TIMBER CONTROL (AMENDMENT) ORDER, 1918.

The Timber Control (Amendment) Order, 1918, dated 9th September, 1918 made by the Board of Trade pursuant to Regulations 2E, 2F, 2G, and 2JJ of the Defence of the Realm Regulations, is as follows:—

The Board of Trade deeming it expedient to make further exercise of the powers conferred upon them by the Defence of the Realm Regulations as respects timber, hereby order as follows:—

1. Paragraph 15 (a) of the Timber Control Order, 1918, is hereby amended by the addition thereto of the words following:—

"The Controller may, from time to time, by writing under his hand, vary the amount of timber which may be purchased without a permit within any period, and when any such notice is given in Form A in the schedule shall be varied accordingly. Any such variation shall be published in the London, Edinburgh, and Dublin "Gazettes."

2. This Order shall be read and construed as one with the Timber Control Order, 1918, and may be cited as the Timber Control (Amendment) Order, 1918.

DEFENCE OF THE REALM  
REGULATIONS.SAFETY RULES FOR VESSELS, PLACE, ETC.,  
CONTAINING EXPLOSIVES, ETC.

In pursuance of the powers conferred upon the Admiralty by Regulation 35A of the Defence of the Realm Regulations, the Lords Commissioners of the Admiralty have made, under date 7th September, the following Rules:—

## 1.—APPLICATION.

These rules shall apply to every person who is employed or who is in or in the vicinity of any store, wharf, vessel, vehicle, receptacle or other premises or place in or upon which any ammunition or explosive substance or any highly inflammable substance or any substance which gives off an inflammable vapour at a temperature of less than 73 degrees Fahrenheit when tested by the Abel close test, is under Admiralty direction, handled, carried, stored or deposited or is under such direction in the course of transit.

These rules shall not apply to small quantities of liquid substances not exceeding 20 galls. contained in vessels securely closed to prevent leakage.



**GOVERNMENT NOTICES AFFECTING TRADE—continued.**

The posting of these Rules conspicuously in or upon any such premises or place as aforesaid shall be deemed to be notice of their contents to all persons employed or being therein or in the vicinity thereof.

**2.—SMOKING, TOBACCO, MATCHES, LIGHTS, ETC.**

No person while he is employed or is in or in the vicinity of any such store, wharf, vessel, vehicle, receptacle, premises or place as aforesaid, shall either smoke or have in his possession any tobacco, cigar, cigarette, pipe or contrivance for smoking or any match or apparatus of any kind for producing a light or any lamp, light or fire of any description, except as may be expressly sanctioned by an Officer in the employ of the Admiralty or of some person authorised by him.

**3.—SEARCHING.**

Any Police Constable or anyone authorised by an Officer as aforesaid, may search at any time any person entering or being in or in the vicinity of any such store, wharf, vessel, vehicle, receptacle, premises or place, as aforesaid, and may examine any such person's clothing and any bag, basket, parcel, or other article he may be carrying, and any such person shall if so required by any Police Constable or by anyone authorised as aforesaid submit to be searched and shall comply with any reasonable directions or Regulations given or made with the object of enabling the search to be carried out. Provided that in no case shall any female person be searched by or in the presence of anyone but a female person.

**4.—INTOXICATION.**

No person in a state of intoxication shall enter or remain in or in the vicinity of any such store, wharf, vessel, vehicle, receptacle, premises or place as aforesaid.

Any person failing to comply with any provision of the above Rules will be guilty of an offence against the Defence of the Realm Regulations and liable on summary conviction to imprisonment with or without hard labour for a period not exceeding six months, or to a fine not exceeding £100 or both.

The Admiralty Rules made under Defence of the Realm Regulation 35a are hereby cancelled.

**POSTAL SECTION.**

**LOSS OF AFRICAN MAILS ON S.S. "GALWAY CASTLE."**

The Postmaster-General announces that the undermentioned mails were on board s.s. "Galway Castle," reported sunk through enemy action, and so far as is known have been entirely lost.

Destination.	Dates of Receipt in London.	
	Letters, &c.	Parcels.
Union of South Africa ..	6 p.m. 31 Aug.- 6 p.m. 7 Sept.	1 p.m. 29 Aug.-
Bechuanaland Protectorate		1 p.m. 5 Sept.
*Rhodesia .. .. .		
Nyasaland .. .. .		
Portuguese East Africa ..		1 p.m. 29th Aug.- 1 p.m. 5 Sept.
Mauritius .. .. .		
*Belgian Congo (Katanga Province) ..		
South West Africa ..	10.30 a.m. 31 Aug.- 10.30 a.m. 7 Sept.	6 p.m. 29 Aug.-
British East Africa ..		noon 5 Sept.
Zanzibar .. .. .		
East African Expeditionary Force ..		

\* Parcels superscribed "via Cape Town" only, but all letters.

**NOTICE.**

The price 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.

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

The Publishers (to whom should be addressed all communications concerning subscriptions and sales) are H.M. Stationery Office, Imperial House, Kingsway, London, W.C. 2, or branches (see Cover).

**Commercial Returns.**

**COTTON IMPORTS AND EXPORTS.**

Return of the Number of Bales of Cotton Imported and Exported at the Various Parts of the United Kingdom during the week and 37 weeks ended 12th September, 1918:

	Week ended 12th Sept. 1918.	37 Weeks ended 12th Sept. 1918.	Week ended 12th Sept. 1918.	37 Weeks ended 12th Sept. 1918.
	IMPORTS.		EXPORTS.	
	Bales.	Bales.	Bales.	Bales.
America .. .. .	7,073	1,244,140	—	175
Brazilian .. .. .	—	8,989	—	—
East Indian .. .. .	200	115,959	—	—
Egyptian .. .. .	8,860	407,226	—	150
Miscellaneous .. .. .	5,977*	97,952†	—	—
<b>Total .. .. .</b>	<b>22,110</b>	<b>1,874,266</b>	<b>—</b>	<b>325</b>

\* Including 58 bales Foreign East African.  
† Including 2,941 bales British West Indian, 1,643 bales British West African, 8,611 bales British East African, and 2,747 Foreign East African.

**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 14th September, 1918, and corresponding weeks of the seven previous years, pursuant to the Corn Returns Act, 1882.

Week ended 14th September, 1918..	Average Price.					
	Wheat.		Barley.		Oats.	
	s.	d.	s.	d.	s.	d.
Corresponding week in—	72	5	60	1	49	2
1911 .. .. .	32	4	29	11	18	9
1912 .. .. .	32	7	29	6	19	10
1913 .. .. .	31	7	30	9	17	11
1914 .. .. .	38	3	29	5	23	8
1915 .. .. .	42	9	39	0	26	4
1916 .. .. .	59	11	52	6	30	9
1917 .. .. .	70	7	57	2	45	0

\*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 hushel or by weight or by 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 hushel of wheat, fifty Imperial pounds for every hushel of barley, and thirty-nine Imperial pounds for every hushel of oats.

**FISHERY STATISTICS FOR AUGUST, 1918.**

The following statement shows the quantity and value of fish landed on the English and Welsh, Scotch and Irish coasts during the month of August, 1918, as compared with 1917:—

	Month of August.			
	1917		1918.	
	Quantity.	Value.	Quantity.	Value.
<b>England and Wales—</b>	cwt.	£	cwt.	£
Fish, excluding shell fish	406,126	857,302	403,202	1,149,897
Shell fish .. .. .	—	20,739	—	31,749
<b>Total .. .. .</b>	<b>—</b>	<b>878,041</b>	<b>—</b>	<b>1,181,646</b>
<b>Scotland—</b>				
Fish, excluding shell fish	422,528	332,406	315,085	499,920
Shell fish .. .. .	—	4,873	—	6,151
<b>Total value .. .. .</b>	<b>—</b>	<b>337,279</b>	<b>—</b>	<b>506,071</b>
<b>Ireland—</b>				
Fish, excluding shell fish	33,512	33,167	52,514	66,260
Shell fish .. .. .	—	2,741	—	3,184
<b>Total value .. .. .</b>	<b>—</b>	<b>36,208</b>	<b>—</b>	<b>69,444</b>

NOTE.—The above figures are subject to correction in the annual returns.

In addition 19,817 cwt., valued at £62,023, were reported to have been landed at English and Welsh ports by Belgian fishing vessels during the month.

# Commercial Returns.

## UNITED KINGDOM.

### FOREIGN TRADE IN AUGUST, 1918.

The following table shows the value of the external trade of the United Kingdom in August, 1918, compared with particulars for a year earlier:—

	Month ended 31st August.					
	Imports (Value C.I.F.*).		Exports (Value F.O.B.†).			
	1917.	1918.	PRODUCE AND MANUFACTURES OF THE UNITED KINGDOM.		FOREIGN AND COLONIAL MERCHANDISE.	
	1917.	1918.	1917.	1918.	1917.	1918.
	£	£	£	£	£	£
<b>I.—Food, Drink, and Tobacco—</b>						
A. Grain and flour .. .. .	18,963,832	12,474,755	14,607	28,438	13,059	15,146
B. Meat, including animals for food .. .. .	8,395,019	13,559,104	13,398	8,203	18,359	31,146
C. Other food and drink—						
(1) Non-dutiable .. .. .	7,007,183	11,131,440	1,026,439	602,227	256,635	67,341
(2) Dutiable .. .. .	6,786,609	10,624,499			144,557	77,824
D. Tobacco .. .. .	74,825	2,254,120	249,166	315,153	20,328	2,659
Total, Class I. .. .. .	41,227,468	50,043,918	1,303,610	954,021	452,938	194,113
<b>II.—Raw Materials and Articles Mainly Un-manufactured—</b>						
A. Coal, coke, and manufactured fuel .. .. .	—	430	4,435,867	5,865,442	—	—
B. Iron ore, scrap iron and steel .. .. .	1,068,080	1,432,557	6,840	7,830	—	—
C. Other metallic ores .. .. .	1,312,536	1,388,657	3,717	562	98,455	83,560
D. Wood and timber .. .. .	3,424,359	1,567,578	64,341	98,005	13,239	7,906
E. Cotton .. .. .	8,323,932	7,854,781	—	—	269,378	—
F. Wool .. .. .	4,650,378	2,405,356	396,973	149,341	212,131	66,253
G. Other textile materials .. .. .	5,130,725	3,488,416	27,008	6,129	187,529	183,869
H. Oil seeds, nuts, oils, fats and gums .. .. .	7,082,026	12,577,398	740,085	106,554	270,454	56,341
I. Hides and undressed skins .. .. .	1,148,839	2,063,696	57,118	89,838	267,160	110,044
J. Paper-making materials .. .. .	876,268	1,199,183	35,985	12,966	—	—
K. Miscellaneous .. .. .	2,210,657	2,044,691	186,845	86,098	1,365,212	430,824
Total, Class II. .. .. .	35,227,800	36,022,743	5,954,749	6,422,765	2,683,558	938,797
<b>III.—Articles Wholly or Mainly Manufactured—</b>						
A. Iron and steel and manufactures thereof .. .. .	1,532,789	763,233	4,097,004	3,621,470	56,581	137,310
B. Other metals and manufactures thereof .. .. .	5,557,753	2,127,771	908,757	731,542	448,505	61,821
C. Cutlery, hardware, implements (except machine tools) and instruments .. .. .	341,593	501,967	429,730	392,499	37,421	30,237
D. Electrical goods and apparatus (other than machinery and uninsulated wire) .. .. .	97,318	66,924	257,172	166,031	11,677	1,010
E. Machinery .. .. .	817,910	924,100	1,644,351	1,364,988	27,618	21,299
F. Ships (new) .. .. .	—	—	5,346	813	—	—
G. Manufactures of wood and timber (including furniture) .. .. .	147,047	180,940	80,396	57,773	21,341	1,444
H. Yarns and textile fabrics—						
(1) Cotton .. .. .	259,151	380,165	11,368,600	15,011,644	56,512	83,016
(2) Wool .. .. .	11,604	15,680	1,886,468	4,417,566	18,131	32,561
(3) Silk .. .. .	566,777	1,795,888	156,230	185,508	141,506	182,963
(4) Other materials .. .. .	585,442	500,527	1,457,576	859,974	135,647	52,695
I. Apparel .. .. .	43,465	70,312	1,723,081	1,030,254	10,752	4,505
J. Chemicals, drugs, dyes, and colours .. .. .	2,682,254	4,224,882	2,112,597	2,097,181	236,356	244,189
K. Leather and manufactures thereof (including gloves but excluding boots and shoes) .. .. .	265,484	791,757	776,000	128,784	51,858	9,197
L. Earthenware and glass .. .. .	62,848	18,177	352,390	325,249	11,811	1,016
M. Paper .. .. .	392,164	334,736	261,512	233,858	5,700	2,090
N. Railway carriages and trucks (not of iron), motor cars, cycles, carts, etc. .. .. .	600,086	940,516	627,136	405,747	19,205	11,353
O. Miscellaneous .. .. .	9,653,489	10,252,599	6,549,097	3,340,684	132,351	264,665
Total, Class III. .. .. .	23,617,174	23,890,174	40,693,443	34,401,535	1,392,972	1,141,371
<b>IV.—Miscellaneous and Unclassified (including Parcel Post)</b>						
	485,176	278,306	1,851,913	1,743,916	4,274	3,054
<b>TOTAL</b> .. .. .	<b>100,557,618</b>	<b>110,235,141</b>	<b>49,803,715</b>	<b>43,522,237</b>	<b>4,533,742</b>	<b>2,277,335</b>

\* The values of the Imports represent the cost, insurance, and freight; or, when goods are consigned for sale, the latest sale value of such goods.

† The values of the Exports represent the cost and the charges of delivering the goods on board the ship, and are known as the "free on board" values.

## H.M. Trade Commissioners.

### AT HEADQUARTERS—

Mr. C. Hamilton Wickes, 73, Basinghall Street, London, E.C. 2.

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Montreal.—Mr. G. T. Milne, H.M. Trade Commissioner, 367, Beaver Hall Square, Montreal (Telegraphic address, "Britcom").

Toronto.—Mr. F. W. Field, H.M. Trade Commissioner, 257-260, Confederation Life Buildings, Toronto (Telegraphic address, "Toroncom").

### NEWFOUNDLAND—

Mr. G. T. Milne, H.M. Trade Commissioner, 367, Beaver Hall Square, Montreal (Telegraphic address, "Britcom").

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Sydney.—The Officer in Charge, H.M. Trade Comr.'s Office, Royal Exchange, Sydney (Telegraphic address, "Combritto").

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