

THE
BOARD OF TRADE
JOURNAL



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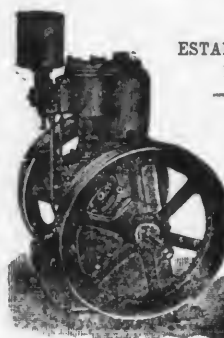
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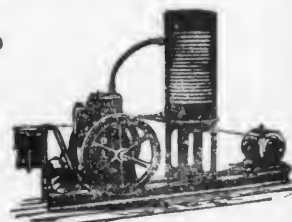
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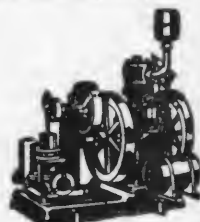


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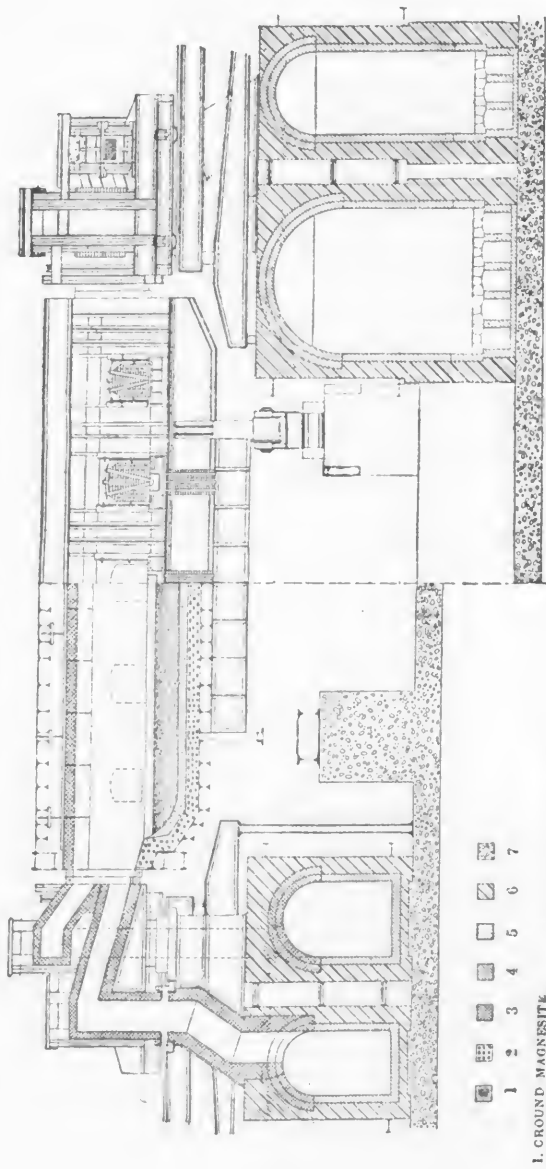
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Acme Chemical Co., Ltd., Tonbridge, Kent, and River Street, Bolton, Lancashire. Arsenite of Soda, Arseniate of Lead, paste and powder, Powder Sheep Dip (Arsenical), approved by Board of Agriculture, for Scab in Great Britain. "Acme" Weed Killer, permanently destroys Weeds. Quassa Chips. "Fumerite," for Destroying Ground Vermin, such as Ants, Slugs, Wireworm, etc. Tree Washes.

Anglo-Continental Guano Works, Ltd., Dock House, Billeter Street, E.C.

Blythe, Wm., & Co., Ltd., Church, Lancs.

Boots Pure Drug Co., Ltd., The Laboratories, Nottingham, Contractors to H.M. Government. Manufacturers of Acetyl Salicylic Acid, Atropin, Beta Eucaine, Chloral formamide, Chloramine-T, Chloroform, Digitalin, Hexamine, Homatropin, Hyoscyne Hydrobromide, Paraldehyde, Phenacetin, Phenazone Salicylate, Saccharin, Salol, Theobrom, Soda Salicyl, etc., etc. 'Phone. 3160. Telegrams: Drug, Nottingham.

British Dyes, Ltd., Huddersfield.

Brunner, Mond & Co., Ltd., Northwich, Cheshire.

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

Hedworth Barium Co., Ltd., Newcastle.

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

Chemical Manure Manufacturers—

Cross, Alexander, & Sons, Ltd., 19, Hope Street, Glasgow.

Chemical Plant and Machinery—

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

China Clay—

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

Christmas Stockings, Crackers, & Surprise Packets &c.—

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

Cleaning Machinery for Miners' Safety Lamps—

Ackroyd & Best, Ltd., Morley, near Leeds.

Clothing, Cap and Helmet Manufacturers (Army, Police and Railway)—

Smith, James, & Co. (Derby), Ltd., Drewry Lane Works, Derby. Contractors to the War Office, Principal Railways, Police and Trams, etc.

Clothing Manufacturers (Army, Police and Railway)—
Hammond, John, & Co., Ltd., Newcastle Staffs.

Webb, C. & J., & Co., Ltd., Burdett Road, London, E. Contractors to the War Office, Post Office, Railways, Police, Docks and Trams, etc. London and South Africa.

Coal and Coke—

Cory Bros. & Co., Ltd., Cardiff.
Wigan Coal and Iron Co., Ltd., Wigan.

Coal Depot Proprietors—

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Coal Tar Colours and Products—

British Dyes, Ltd., Huddersfield.

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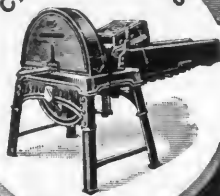
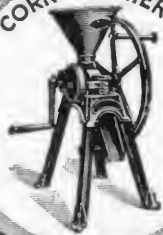
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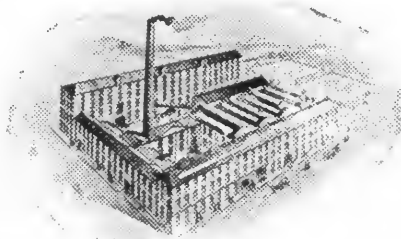
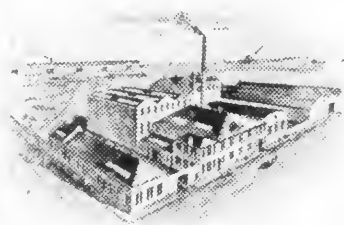


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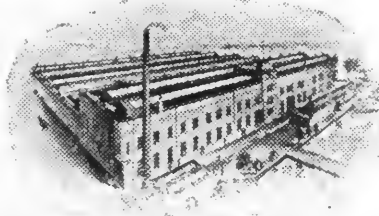


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The Wigan Coal and Iron Co., Ltd., Wigan.

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deen. Makers of Real Horn and "Keronyx"
Dressing Combs, Barber Combs, Ladies
Real Horn Fancy Combs, and combs of
every description, all non-inflammable.
Warehouse: 43, Basinghall Street, London,
E.C.

Compasses (Magnetic)—

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

Concertinas (English), Æolias and Duet Concertinas—

Wheatstone, C., & Co., 15, West Street,
London, W.C.

Copper Alloys—

Thermit, Ltd., 675, Commercial Road,
London, E.

Copper Tape, Wire Rope, &c.—

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

Cork Insulation—

Newalls Insulation Company, Ltd., New-
castle-upon-Tyne, and branches.

Costumes—

Heaton's (Leeds), Ltd., Heaton Buildings,
North Street, Leeds. Ladies' and Maids'
Tailor-Made Costumes, Coats and Skirts.
Registered Trade Marks: "Alwetha" Rain-
coats, "ESIW" Serges.

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Judge, T. & W., London, S.E.

Cotton Cleaning Waste—

Spencer & Curedale, Ltd., Bury Ground
Works, Bury.

Cotton Driving Ropes—

Hart, Thomas, 12 and 14, Town Hall St.,
Blackburn; Lambeth Rope Works, Black-
burn. Telephone: 10, Blackburn. Tele-
graphic Address, "Hart, Blackburn."

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Hoyle & Barlow, Ltd., 103, Portland Street,
Manchester. Zephyrs, Shirtings, Butter
Muslins, Madapolams, Longcloths, Bedford
Cords, etc.

Lowthian, Drake, & Co., 15, Aytoun Street,
Manchester (Fancies, Linings, Shirtings,
etc.).

Spinner, E., & Co., Manchester.

Cotton Motor Tyre Ducks, Sailcloth and General Cotton

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

Cotton Spinners and Manufacturers—

Partington, R. & J., Ltd., 40, Portland Street,
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White and Khaki Drills, Grey and Coloured
Pocketings, Harvard Shirtings, Galateas,
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Crane Weighing Machines—

Salter, Geo., & Co., West Bromwich.

Cranes—

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and Abroad.

Croosoting Plant—

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Works, Berwick-on-Tweed.

Cylinder and Cistern Manufacturers—

W. P. Butterfield's, Ltd., Shipley, Yorks.
Telegrams: "Tanka, Shipley." Telephone:
35 Shipley.

Decklights and Perthole Glasses—

Stevens, James, & Son, Victoria Glass Works,
Birmingham.

Decorative Tiles—

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

Dentists' Materials Manufacturers—

Claudius Ash, Sons, & Co., Ltd., 5 to 12,
Broad Street, Golden Square, London, W.
The Dental Manufacturing Co., Ltd., "Alston
House," Newman Street, Oxford Street,
London, W. 1.

The Department of Overseas Trade (Development and Intelligence),

73, Basinghall Street, London, E.C. 2.

TELEGRAMS { "Advantage, Stock, London."
CODE: A.B.C., 5th Edition.

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

DIRECT COMMUNICATION WITH TRADERS.

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

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

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

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

have been placed at the disposal of the Board of Trade by the Port of London Authority, from 11th to 22nd March. The office dealing with Fair matters is at 10, Basinghall Street, London, E.C. 2.

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

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

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

OPENINGS FOR TRADE AND NAMES OF TRADERS IN COUNTRIES ABROAD.

Confidential Information.

SPECIAL REGISTER.

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

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

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

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

FORM K.

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

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

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

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

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

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

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

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

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The Board of Trade Journal

AND COMMERCIAL GAZETTE.

VOL. C. (New Series.) No. 1105.]

JANUARY 31st, 1918.

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The Board of Trade.

CONTROL OF ROAD TRANSPORT.

A BOARD TO BE CONSTITUTED.

The President of the Board of Trade, with the concurrence of the War Cabinet, has decided to appoint a Road Transport Board to co-ordinate the work of the existing Government Departments in connection with road transport; to determine what further measures are necessary to ensure the most economic use of road transport vehicles, and their efficient allocation for meeting such requirements as may arise from time to time for the transport of food, munitions, and other war material, and for the essential needs of the trade and industry of the country; and, subject to the direction of the Board of Trade, to give executive effect thereto.

The Board will consist of representatives of each of the following Departments:—

Board of Trade (Petrol Control Department).
Board of Trade (Horse Transport Department).
Ministry of Munitions.
Ministry of Food.
War Office.
Post Office.

CONSTITUTION OF THE CENTRAL BOARD.

The Road Transport Board, when constituted, will take into consideration, among other things, the following proposals:—

- (a) The registration of vehicles, whether driven by petrol, steam, gas, or electricity, or horse-drawn, in such a way that any of them could be rapidly called upon in any district should emergency arise.
- (b) The preparation of a priority scheme for the use of such vehicles in emergency.
- (c) The preparation and putting into force of local schemes for co-ordination and economy in the use of horse and mechanical transport by traders, Government Departments, and others, whether by voluntary action or, if necessary, by compulsion, having regard to the necessity of not unduly interfering with any essential trade or industry.
- (d) The regulation of rates of hire for horses and vehicles (so far as not already regulated by any public authority).

Horses and vehicles used mainly or entirely for agricultural purposes are excluded from (c) and (d) above.

DIVISIONAL BOARDS.

It is further proposed that the Board shall exercise its executive functions through Divisional Road Transport Boards set up in each of the 15 Divisional Areas of the Food Commissioners, consisting in each case of:—

Road Transport Officer (appointed by the Board of Trade).

The Divisional Food Commissioner of the Ministry of Food or his representative.

The Local Transport Officer of the Ministry of Munitions or his representative, with
Two representatives of local interests.
The Chairman to be the Road Transport Officer.

Sub-Committees will be appointed by the Divisional Boards to deal with sub-areas of their Divisions.

General instructions for the guidance of the Divisional Road Transport Boards will be drawn up by the Central Board.

NATURAL INDIGO.

ENTIRE STOCK DISPOSED OF.

The Brokers employed to handle the natural indigo purchases of His Majesty's Government, have informed the Board of Trade that the entire stock has been disposed of, and that payment has been received for the same.

At the outbreak of war, owing to the inevitable shortage of synthetic indigo it was felt that there might be a danger of the supply of the natural indigo getting into the hands of a very small group, and therefore His Majesty's Government, in order to ensure, as far as possible, an equitable distribution of the available supply of natural indigo, decided to purchase practically the entire available stocks, and allow it to be gradually sold to the consumers at a reasonable price.

The amount purchased was 267 tons, at a gross cost of £261,600. Out of this, His Majesty's Government were able to accede to a request from the French Government to sell them 100 tons, and the remainder has been gradually disposed of to the trade, both for home consumption and for export. In the result the accounts show a profit (without allowing for interest on the purchase price) of £3,556.

The object of His Majesty's Government in making this purchase was achieved, as at all times during the last three years the trade have been able to obtain supplies of natural indigo at a fair market price.

TRADE ADVISERS.

The President has appointed the following gentlemen to be advisers to the Board of Trade as to the conditions and requirements of the particular trades referred to during the period immediately following the war, and as to any action which it is desirable should be taken by the Board in respect thereto:—

Sir Frank Warner, K.B.E.—Textile trades (other than cotton).

Dr. J. Gordon Parker.—Leather trades.

Mr. H. D. Searles-Wood.—Building and furnishing trades.

These three officers will be attached to the Industries and Manufactures Department of the Board.

Special Articles.

COAL SUPPLIES AND DISTRIBUTION.

II.

CONTROLLING THE MINES.

In the previous article it was explained how the emergency regulation of coal supplies and distribution led to the taking over of all the British coal mines by the Board of Trade, and the establishment of the Department of the Controller of Coal Mines. In the present article the working of the Control, which dates from 1st March, 1917, will be described. The objects which the Controller set before himself were as follows:—

1. To control the whole production and distribution of coal in the national interest, and
2. To remove the chief cause of labour unrest by making it possible for the men to feel that they were working for the community, and not in order to earn excessive profits for the coal owners.

The Agreement in regard to compensation, which was arrived at after negotiations between the Controller and the representatives of the Mining Association, was summarised briefly last week. It is an exceedingly complicated document, which took four months to negotiate, and is now included in the Coal Mines Control Agreement (Confirmation) Act, passed this month by Parliament. The terms of the agreement are taken by the owners in full satisfaction for all claims for compensation arising in respect of the Orders of the Board of Trade, dated 29th November, 1916, and 22nd February, 1917, and anything done thereunder. The Agreement therefore, in effect, dates back as regards the South Wales coalfield to the 1st December, 1916, and as regards the rest of the country, to 1st March, 1917.

ADVISORY BOARD OF OWNERS AND MINERS.

From the first it has been the Controller's desire to make the fullest use of the existing machinery of the coal-owners' and of the miners' organisations. With this object in view, an Advisory Board was set up with which he would be kept in constant touch, and by whose experience and technical knowledge he could be assisted. The Board consists of seven representatives of coal owners, and seven officials of the Miners' Federation. Their names are:—*Owners*—Sir T. Ratcliffe-Ellis, Sir F. W. T. Brain, Mr. C. E. Rhodes, Mr. Adam Nimmo, Mr. Hugh Bramwell, O.B.E., Mr. A. F. Pease, and Mr. J. F. Jones. *Miners*—The Right Hon. T. Ashton, M.P., Mr. R. Smillie, Mr. Stephen Walsh, M.P., Mr. Vernon Hartshorn, O.B.E., Mr. Herbert Smith, O.B.E., Mr. James Robson, and Mr W. Straker. This Advisory Board meets about twice each month, and has considered such important questions as recruiting, labour disputes, miners' holidays, mobility (the transfer of men from one district to another), short time and absenteeism, the settlement of price lists, and the supply of pitwood. The assistance of the Advisory Board has been of the greatest value, and has enabled the Controller rapidly to explore the problems which constantly arise upon his horizon.

PRODUCTION AND LABOUR.

One of the chief objects of control was to maintain the output of coal, and the postponement of development work was recommended by the Coal Mining Organisation Committee in their first report as one means of keeping production at the maxi-

SPECIAL ARTICLES—continued.

mum. It is an essential feature of the system of control that the actual management of the mines should remain as far as possible in the hands of the owners, but considerations of man-power and the shortage of materials render some regulation unavoidable. Both materials and labour must be put to the most productive use, and be kept for those classes of coal which were most in demand. New sinkings are rarely permitted. The employment of a staff of District Inspectors has been sanctioned by the Treasury, and these officers report on the necessity of proposed works and on the relative urgency of demands for materials.

ARRANGEMENTS WITH WORKMEN: THE "WAR WAGE."

Experience since the coal mines were taken over justifies the assertion that the miners now realise that they are working for their country—rather than for the private profit of their employers. There has been a marked decrease in industrial unrest, and a greater willingness to regard work in the mines as war-service of the first importance. The chief Labour event since Control was established was the demand of the Miners' Federation for a 25 per cent. increase in wages to meet the increased cost of living. This demand was presented on 28th August of last year. As the result of subsequent negotiations the miners finally accepted increases of 9s. (and 4s. 6d. in the case of boys) a week—that is, 1s. 6d. a day for each day on which a man works or is ready and able to work, and 9d. a day for boys under 16 years old. A feature of the arrangement is that the increases of 1s. 6d. (or 9d.) a day are paid even when the pit is idle for lack of trade—for example, in the exporting districts—and this is done in order to give some relief to men in the export districts who are suffering from the irregular working of the pits, as the result of shipping losses. The irregularity is no fault of theirs or of the coal owners. By the above arrangement with the miners, the Controller was able to convert a demand for a percentage increase into the concession of a flat rate. An advance on a percentage basis would have chiefly benefited men who were getting regular work, and who were previously earning the highest wages. The settlement has been extended by the Ministry of Munitions to workers in many cognate industries. The "War Wage," as it is called, dates back to 17th September, 1917. An inevitable consequence has been an increase in the pithead prices of coal of 2s. 6d. a ton.

SETTLEMENT OF DISPUTES.

While the policy of the Department is to insist upon the use of local machinery of owners and miners' associations for the settlement of disputes, a close watch at headquarters is kept upon them. All disputes which may involve a stoppage of work are reported at once to the Controller, whose friendly offices are always at the disposal of the parties, either personally in London, or locally through members of his staff.

RECRUITMENT OF MINERS.

The Controller of Coal Mines inherited from the Home Office the functions of that Department in regard to the recruitment of miners, with the exception of the supervision of the Colliery Recruiting Courts. The Central Court sits at the Coal Mines Department and one of the staff acts as its secretary. These functions have now been transferred by the War Cabinet to the Ministry of National Service, while the Controller continues to act in an advisory capacity.

MOBILISING MINING LABOUR.

One of the most difficult problems before the Controller has arisen from the diminished supply of ships in certain export districts (East Fifeshire, the Lothians, Northumberland, Durham and

SPECIAL ARTICLES—continued.

portions of the South Wales field). It is not possible to keep the pits in these districts regularly working and the men constantly employed, although in most other coalfields, and in many other industries of national importance, there is an acute shortage of labour. The problem has been to make labour more mobile and to effect the necessary transference. Various measures are being taken to solve the difficulties which have arisen. For example, by arrangement with the Railway Executive Committee, a train service was put on to enable miners who live in the east of Fifeshire (where the short time has been very serious) to go to the western districts of that county where the pits are working better. Special commissions of enquiry (of which the local miners' leaders are members) are investigating the short time worked in some districts, and making suggestions for an improvement. In order, however, to deal with the whole question systematically the Controller placed before the Miners' Federation of Great Britain a proposal for the establishment of Mobility Bureaux, to be worked by the Miners' Federation and their District Associations. The purpose of the Bureaux was to transfer coal miners from mines which were not working full time, to other coal, fireclay, or ganister mines where their labour was required. The Federation have now accepted the proposal and District Mobility Bureaux are being set up. The Controller is also collaborating with other Departments (such as the Ministries of Munitions and of National Service) in order to transfer surplus mining labour into other occupations, such as timber-felling, iron-stone and iron-ore mining, etc., the shipyards, etc.

THE OUTPUT OF COAL.

The broad results of the measures which have been taken by the Board of Trade may be shown by the figures of coal outputs since the war began. They are given below in millions of tons for six-monthly periods during the four years, 1914, 1915, 1916, and 1917.

	Million Tons.
January to June, 1914	140.0
July to December, 1914... ..	125.6
January to June, 1915	127.6
July to December, 1915... ..	126.6
January to June, 1916	128.3
July to December, 1916... ..	128.1
January to June, 1917	126.4
July to December, 1917... ..	121.3

It is remarkable when all the difficulties are considered which have arisen through the long duration of the war and the calls upon the national man-power, that the output of the British coal mines during last year amounted to 247.7 million tons, only 8.7 million tons (3.4 per cent.) less than during 1916. It was not until the second half of 1917 that the output fell below that for the second half of 1914.

DISTRIBUTION.

It will be seen from the above figures of output that, thanks to the emergency measures taken in the early stages of the war, there has never been a shortage of coal in the sense that there has been a shortage of petrol. We produce all our coal supplies in this country, while—with the exception of the comparatively small production from Scottish shale—we import all our petrol supplies. The coal problem has, throughout, been primarily a problem of labour and distribution. The Government control of the collieries, through the Department of Coal Mines, has facilitated the arrangement of supplies of coal to industrial consumers of national importance, particularly in those cases in which it has been necessary to provide supplies of special

SPECIAL ARTICLES—continued.

qualities or grades of coal by diversion from consumers of less importance.

ECONOMISING RAILWAY TRANSPORT.

In view of the urgent necessity of effecting economies in railway transport, a Redistribution Scheme was worked out with the object of securing the consumption of coal as near as possible to the point of production. The necessary powers were provided by the Coal Transport Order, 1917 (made by the Board of Trade under the Defence of the Realm Regulations on 4th July last), and by the Directions of the Controller of Coal Mines which were issued under this Order. The country was divided into areas, the interchange of coal between producing areas were restricted, and consuming districts were allotted specific sources of supply. The Redistribution Scheme came into operation on 10th September, and the estimated saving in railway haulage alone—apart from other economies in railway working—is 700 million ton-miles annually. The Controller is now taking up the question of unnecessary transport within the areas. Canal transport for coal is made use of wherever practicable. The Department has been able to accumulate technical records of all industrial firms, the requirements of each firm are carefully considered, and certificates for special coal are issued whenever it is considered to be necessary. There is a special technical staff at the Coal Mines Department, which deals with all points relative to the suitability of coal for various industrial processes, and this staff is assisted by representatives throughout the country. Firms are visited and reports submitted upon any difficulty which arises out of the allocation of supplies.

COAL FOR THE LONDON AREA.

In consequence of the breakdown during the early part of 1917 in the ordinary trade arrangements for the distribution of house coal in the London area, it was considered advisable to establish a control over the supply and distribution for London and so to prevent a recurrence this winter of the earlier trouble. A Metropolitan Distribution Branch was established to inquire and report; on 10th August the Household Coal Distribution Order was made, and the Branch was charged with the execution and administration of it. This Order extends to the Metropolitan Police District, and to certain adjacent urban districts; the area subject to its operation comprises about 2,000,000 separate houses and premises. At the date of the Order (10th August last) the supply of coal to London coal merchants was about 80,000 tons weekly, the stock of coal was about 70,000 tons, and the unexecuted orders on the merchants' books 420,000 tons. During the last four months of 1917 the Controller increased the supplies for London by about 25,000 tons a week as compared with those for the corresponding period of 1916—the period immediately preceding the winter shortage of 1916-17. A great improvement was quickly seen, for at the beginning of this year the stocks had risen to about 314,000 tons, representing slightly over three weeks' supply, and the unexecuted orders on the coal merchants' books had fallen to 85,000 tons. The increase in London's supplies was provided by earmarking certain unallocated margins of coal at the collieries and by temporarily diverting supplies intended for other destinations.

CONTROL OF CONSUMPTION IN LONDON.

When it was decided to control household consumption of coal in the London area, steps were taken to register all coal merchants, to set up local organisations for watching the interests of consumers, and to devise a scale of allowances which would be equitable as between the different classes of users. All persons engaged in the distribution of coal were recorded and arrangements made to keep each one under review, so as to ensure that he continued effectively to carry on his trade. A census of men and horses was undertaken in order to protect the facilities for distribution and, if

SPECIAL ARTICLES—continued.

possible, to augment them. The co-operation of the Food Production Department of the Board of Agriculture was secured in regard to horses. A local organisation for watching the interests of consumers was set up by the appointment of local coal overseers by the local authorities in each district. With a view to assist the local coal overseers, a coal merchant, known as the Coal Merchants' Supervisor, was appointed in each district as well. This organisation, which involves the co-operation of representatives of both merchants and consumers, enables local troubles to be settled at the source.

In order that an equitable distribution of coal might be secured, allowances were fixed in respect of houses of different sizes, and arrangements made to assess exceptional buildings and premises. Forms of requisition were issued for the purpose early in September, and the machinery has worked smoothly and satisfactorily. The object of the scheme of allowances was to reduce the extravagant consumption of coal by the wealthy classes, to do away with the use of coal in unnecessary buildings, and thus to secure that a supply should be available for the poorer classes. At the same time it was sought to diminish the total demand for coal. A reduction in the amount burned was made urgent by the difficulties of labour and transport.

DISTRIBUTION TO SMALL CONSUMERS.

A special section of the Branch has been set up to review the facilities for selling coal in small quantities. Stocks were provided in difficult areas under the control of the local authorities, and every encouragement was given to the small dealers and retailers to continue in business. The demands of the war have encroached severely upon this unorganised body of distributors, many of whom carried on one-man businesses. It was by no means easy to organise those who still remained and to supplement them from other sources.

PROVINCIAL COMMITTEES AND STOCKS.

Local House Coal Distribution Committees have been appointed in towns with a population of 20,000 or over, and emergency stocks of coal are being accumulated in these towns under the direct control of the local authorities. Smaller towns have been invited to combine with their urban and rural districts to form committees on similar lines; and, as in the case of the larger towns, the Controller's representatives visit the committees in an advisory capacity.

PRICES.

In the first article, published on 24th January, it was explained how the prices of coal at the pit's mouth were fixed by the Price of Coal (Limitation) Act, passed in July, 1915. Under the régime of the Controller of Coal Mines the regulation of prices was extended to cover both wholesale merchants' charges and retail prices. Powers were conferred by the Wholesale Coal Prices Order and the Retail Coal Prices Order made by the Board of Trade on 5th and 11th September respectively. The function of fixing in each locality the maximum retail prices of house coal which would comply with the requirements of the Retail Coal Prices Order was assigned to local authorities throughout the United Kingdom.

The grant of a war wage to the miners as from 17th September rendered necessary a general increase in the price of coal, and the War Cabinet sanctioned a maximum increase of 2s. 6d. a ton at the pit's mouth on all coal except that exported to the Allies. This was put in force by an Order of 12th October. The increase, except in the case of house coal, was retrospective to the same date as for the War Wage. The increase in price at the pit's mouth authorised under the Act of 1915 was 4s. a ton, so that the present authorised maximum increase is 6s. 6d. a ton. (The increase is 9s. in the case of South Wales and the Forest of Dean, for which districts the "standard amount" under the Act had previously been increased by the Board of Trade).

EXPORT AND BUNKERING PRICES.

The effect of the shortage of shipping resulting from the operations of enemy submarines was felt

SPECIAL ARTICLES—continued.

in the early part of 1917 in the form of a considerable reduction in the quantity of coal exported, and a serious fall in export prices. In order to deal with the position as regards prices, a code of Directions as to the Sale of Coal was issued by the Controller of Coal Mines on 28th June last, embodying a schedule of prices of coal sold for export or bunkering. The scheduled prices operate as fixed prices in the case of shipments to France and Italy, and as *minima* in the case of shipments to neutral countries. A series of amendments of these Directions was issued on 12th October, and the schedule prices were increased by 2s. 6d. per ton, except as regards shipments to France and Italy, in accordance with the decision of the War Cabinet mentioned above.

PITWOOD.

Coal mines are very large users of wood for propping up roofs, etc., and the much reduced imports of pitwood made very difficult the provision of the supplies, without which coal getting could not go on. At first the Controller made use of the personnel of the old Pit Timber Committees throughout the country which had been set up by the Home Office, and which were worked under a Joint Committee of members of the Coal Mining Organisation Committee and the Home-grown Timber Committee of the Board of Agriculture, with a representative of the Board of Trade. He also appointed eight District Pitwood Committees throughout the country, the chairman in each case being one of H.M. Inspectors of Mines, with an officer paid by the Controller to act as the chairman's technical assistant. The first duty of these Committees was to procure the formation of District Pitwood Associations, and seven Associations have been formed to develop the supply of home-grown timber, which has become so necessary as the result of the curtailment of the importation of pitwood by the War Cabinet. The great majority of the collieries are readily joining these Pitwood Associations, and colliery owners who show reluctance are being strongly pressed to join. In July the Controller of Timber Supplies offered to take over from the Controller of Coal Mines the duty of supplying the collieries with pitwood and other necessary timber, together with the supervision of the District Pitwood Committees. This offer was accepted, and the Controller of Timber Supplies is now responsible for the work. The functions of the Controller of Coal Mines respecting pitwood thenceforward have been confined mainly to watching the activities of the District Pitwood Committees, encouraging the formation of Pitwood Associations, and dealing with applications from colliery companies for permits to purchase soft imported wood.

CONTROLLING TIMBER STOCKS AND PRICES.

On 19th December the Controller of Coal Mines (acting after consultation with the Controller of Timber Supplies) issued detailed instructions regarding stocks and prices, and contracts for pitwood and other mining timber. Stocks were limited to twelve months' future consumption. This was done because some collieries had stocks much exceeding their requirements for twelve months, while others had nothing like that quantity. The maximum prices which collieries were permitted to pay were fixed in accordance with the various classes of timber and the position of the coalfields. Certain existing contracts for pitwood were ordered to be submitted to the Controller for direction and advice as to revision.

EFFECT OF CONTROL.

It may be said that the policy of taking over the coal mines, and of controlling the distribution and prices of coal, has been justified by its results. In 1913 there were 1,110,884 men employed in and about the British coal mines, and of this number 316,000 have joined the Army. Other labour has been drafted in, so that the employees during 1917 numbered approximately 987,000, a reduction of only 133,000 men. Still, the loss of the young, vigorous, and trained miners was severely felt, and it is a matter for satisfaction that the output of coal during the years 1915, 1916, and 1917 should have been so well maintained. The present output

SPECIAL ARTICLES—continued.

is naturally a good deal less than it was before the war—that was inevitable—but, after taking account of the big reduction in coal for export, it may be said that the amount available for inland consumption, the Admiralty, and for ships' bunkers is almost as large now as it was in 1913. The Admiralty's requirements, of course, expanded enormously, and the supplies available for inland consumers (other than direct war industries) have had to be cut down and the strictest economy insisted upon. Everything possible is being done to secure economy. Electric supply undertakings have been urged to inter-connect wherever this can be done with a small expenditure of materials and labour; representations have been made to the Home Office in order to secure lighting restrictions and the early closing of shops; and the need for economy has been brought prominently before the public notice by appeals to both industrial and domestic consumers; the London district has been definitely rationed.

PRODUCTION AND CONSUMPTION.

The net result is shown in the following table, which gives the comparative figures of coal production and consumption for the first year of Control and for the years 1913 and 1916:

	1913.	1916.	1917 (partly estimated).
	Million tons.	Million tons.	Million tons.
Coal output	287	256	247.5
Export... ..	77	42	38
Balance available for Inland. Admiralty and bunkers ...	210	214	207
Stocks at pithead on hand at close of year	2	2	4.5

It will be seen that the coal available for inland, Admiralty, and bunkers shows only a slight falling off as compared with the pre-war year 1913, while stocks on hand at the end of the last year show an increase. This increase is, however, largely made up of small coal, which cannot now be exported. The exports have fallen off largely in 1917 owing to the shortage of shipping, and the decrease in exports at the end of 1917 as compared with the end of 1916 was at the rate of approximately 3,000,000 tons per annum. At the same time, the demands for coal for the purposes of the Government and of essential war industries are always increasing.

THE MAIN OBJECTS ATTAINED.

At the beginning of this survey it was stated that the main objects which the Coal Control have sought to attain were:—(1) To control the whole production and distribution of coal in the national interest, and (2) to remove the chief cause of labour unrest by making it possible for men to feel that they were working for the community and not in order to earn excessive profits for the owners. From the description of the work undertaken by the Coal Mines Department, it will be seen that the profits of the industry have as far as possible been limited and also equalised, that production and distribution have been adjusted to the altered conditions arising out of the war, that transport has been economised, essential supplies ensured, and prices and consumption regulated. On the whole it may be said that a much better spirit prevails in the coal industry than was the case before the Control began, and both the industry and the trade have materially assisted in the work of the Controller by co-operation with him wherever this has been possible. Judged by the manner in which they have discharged their main purposes, the Department which controls coal supplies and distribution have achieved much of that for which they were established to do.

SPECIAL ARTICLES—continued.

AFTER-WAR TRADE.

REPORTS OF THE DEPARTMENTAL COMMITTEES—V.

RAW MATERIALS: IRON.

The British Iron and Steel Industries import large quantities of ores, and are finding it more and more necessary to draw their supplies of raw materials from sources outside this country. In the year 1913 the total import of ores used in the manufacture of iron and steel amounted to 8,043,426 tons, of a gross value of £8,340,996; and of this there were three main divisions:—

	Tons.	£
Iron ore	7,230,605	valued at 6,873,338
Manganiferous ore	211,614	172,495
Manganese ore	601,177	1,295,113

The sources from which these supplies were drawn are grouped in the following table:—

	British Posses- sions.	Allied Posses- sions.	Neutrals.	Enemy Posses- sions.
Iron ore	111,500	1,475,068	4,623,378	41,259
Manganiferous ore	—	3,797	207,847	—
Manganese ore	308,790	203,424	25,656	307

"Mere dependence upon external supplies we view without alarm," the Committee investigating these trades state in their Report, since by reason of this country's maritime position the resources of the world are open to her. But measures must be taken to ensure that the industries of this country are not paralysed through lack of control of sufficient resources of overseas ores. The reality of this danger has been, in the opinion of the Committee, sufficiently established by the experiences of the war.

THE ORIGINAL BESSEMER PROCESS.

A short historical survey of the iron and steel industries will give a clearer appreciation of the present relative positions of the United Kingdom and her competitors. The rapid development of these industries is one of the most striking features of the economic history of the nineteenth century. The construction of railways, the new and manifold applications of earlier mechanical discoveries, brought about an unprecedented demand for a material combining strength, lightness and elasticity. To satisfy this ever-growing demand, great efforts were made to improve the quality and increase the output of malleable iron. Then came the Bessemer process, which led to the production of a steel which in cheapness and power and resistance was much superior to malleable iron. Its great disadvantage at first was that, for its successful working, a pig-iron low in phosphorus and sulphur was indispensable. No treatment of ores in the blast furnace or the Bessemer converter could eliminate the phosphorus from the iron and so prevent it from passing into the steel. The defect limited very seriously the capacity of the steel trades to utilise the great bulk of the world's wealth in iron ore. Of the iron ore output of the world, fully 85 per cent. is relatively high in phosphorus, and was therefore unsuitable for the original Bessemer process. England and America were rich in suitable Bessemer ore, while the iron ore deposits under German control in Lorraine and Luxembourg were high in phosphorus.

UTILISING BASIC STEEL.

An immediate revolution, however, was caused by the Thomas (Basic Bessemer) process. Conditions in Germany were extraordinarily favourable to the use of this process, and it was adopted with alacrity. The Committee state:—

In Great Britain, on the other hand, the need was less pressing, and manufacturing opinion was slow

SPECIAL ARTICLES—continued.

to change. While experience was lacking, it was but natural that Thomas steel should fail to attain an equality with that produced by the Acid Bessemer process; and there grew up in this country a widespread prejudice against Basic steel. Up to 1890 the Admiralty and Lloyd's declined to permit the use of Basic steel in shipbuilding work.

There was at the outset some foundation for this prejudice in favour of acid steel. The quality of steel made in the Basic Converter was difficult to control; but the application of the Open-Hearth Furnace to the Basic Process about the year 1880 brought the two processes to a comparatively equal footing. The great steel industries of modern growth have been built up upon the production of Basic steel. In the quinquennium 1901-1905 Germany produced an average of 5,129,000 tons of Thomas ingots, against 379,000 tons of Acid Bessemer steel, and 2,480,000 tons of Basic Open Hearth ingots, against 135,000 tons of Acid Open Hearth steel per annum. In 1913-1914 the production of Basic Bessemer ingots reached 10,629,697 tons per annum, against 155,138 tons of Acid Bessemer steel, and of Open Hearth Basic ingots 7,339,314 tons, against 192,000 tons produced by the Acid Open Hearth process.

The history of the American trade is somewhat different. The great expansion of the American industry came with the introduction of the Basic Open Hearth process. In the quinquennium 1901-1905 America produced an average of 9,049,000 tons of Acid Bessemer ingots, 5,155,000 tons of Basic Open Hearth steel, and 1,056,000 tons of Acid Open Hearth steel per annum. In 1913 the production of Acid Bessemer steel reached 9,545,706 tons, of Basic Open Hearth 20,344,626 tons, and of Acid Open Hearth 1,255,305 tons. The average British steel production per annum for 1901-1905 was 1,224,000 tons Acid Bessemer steel, 596,000 tons of Basic Bessemer, 545,000 tons of Basic Open Hearth, and 2,771,000 tons of Acid Open Hearth steel. In 1915 the production was 821,408 tons of Acid Bessemer, 479,816 tons of Basic Bessemer, 2,958,968 tons of Basic Open Hearth, and 4,090,752 tons of Acid Open Hearth steel. It is clear from these figures that the steel industry of the future will be largely founded upon the Basic process, and the tendency is towards the more general adoption of the Basic Open Hearth process.

Certain recommendations of the Committee as to ways in which the British Iron and Steel Industries can help themselves to meet the intensified international competition which is expected after the war will be set out in later articles in this series; the present article is concerned only with the Committee's Recommendation as to Iron Ore supplies. It is stated as follows:—

RECOMMENDATION AS TO RAW MATERIALS.

The ore trade of Great Britain was, and still is, mainly in the hands of merchants who acted as intermediaries between the consumer and the shipper or producer of the imported ore. In some cases, users of ores had taken steps to obtain interests in ore properties abroad, but it is generally true that the connection between consumer and producer was purely commercial, and that there was no real solidarity of interest to prevent a sudden interruption of supplies.

The experience of the war has demonstrated the national importance of the iron and steel industries, and has shown that their maintenance and development are essential to the safety and well being of the nation.

The Committee are of opinion that it is no longer safe to entrust the very life of the iron and steel industries entirely to the efforts of private enterprise. The creations of individual energy are powerless in face of the activities or organised trade combinations.

The Committee, therefore, recommend that co-operative effort, backed where it is found necessary by Government support, should endeavour to deal with the question of ore supplies. They urge the creation of an organisation composed of users of iron ores and others interested in and essential to the conduct of the trade. This organisation would concern itself with the import and distribution of foreign ores in Great Britain and its activities would be extended to the acquisition of interests in ore properties abroad with a view to their utilisation for consumption in Great Britain.

The Committee beg to draw attention to the world wide organisation of the firm of Messrs. W. H. Muller and Company of the Hague, which would, in their opinion, form a very useful example for the proposed syndicate to follow.

The capital of the proposed syndicate might be furnished by the consumers of iron ore in proportion to their requirements, by others interested in and

SPECIAL ARTICLES—continued.

essential to the conduct of the trade, and, lastly, by the Government, either by way of loan or of interest in the undertaking. The extent of this Government financial assistance must, of course, depend upon the magnitude of the future operations of the syndicate.

At the same time, it would be well to encourage the acquisition of resources of their own by the various consumers. The organisation recommended by the Committee is intended to aid and not to supplant individual efforts in this direction.

The Committee feel that an adequate economic survey of the natural resources of Great Britain and other parts of the Empire would be of immense service in the future. Such a survey appears to them to be the necessary condition of a definite trade policy.

The Committee are convinced that the creation of a strong organisation of the character suggested would be of incalculable advantage, both to the iron and steel industries and to the nation.

SIR HUGH BELL'S VIEWS.

Sir Hugh Bell, Bart., qualifies the above in the following words:—

While in general agreement with the foregoing, I desire to record my opinion that any intervention by the State in enterprises of this sort is most undesirable and should only take place if overwhelming evidence of its necessity can be proved. The employment of funds raised by taxation is in my judgment eminently dangerous and should not be resorted to except under pressure of the gravest kind.

TRADE RECONSTRUCTION IN GERMANY.

HISTORY OF THE NEW MINISTRY.

Reconstruction, in all its social and economic ramifications, has engaged the attention of the German statesmen since the early months of 1916. It became apparent to them that the complexities of modern life necessitated a close and careful study of the multiplicity of measures to be taken in the transition from war to peace. Specialisation in this direction has proceeded, primarily, with a view to the rapid recovery and rehabilitation of commerce and industry. New Ministries have been created, some legislation even has been passed, while Prussia and the component States of the Empire have been honeycombed with committees appointed to investigate and report on the future of their respective industries or territories.

IMPERIAL MINISTRY OF ECONOMICS.

Before the war, commerce and industry in Germany were under the supervision of the Fourth Division of the Imperial Ministry of the Interior. There was no separate Ministry for trade. The duties of this Fourth Division were to study and report on all matters of commercial policy, particularly commercial treaties; economic problems of agriculture and of industry; customs, tariffs and taxation at home and abroad; improvement of methods of production; comparative statistics of production in Germany and other countries; general statistics; statistics of imports and exports; and the banks and stock exchanges. For reconstruction purposes, however, a separate Ministry—the Imperial Ministry of Economics—was created on 21st October, 1917, and it took over matters connected with social and economic policy which had hitherto fallen within the sphere of the Imperial Ministry of the Interior. Subsequently, it received wider functions, for, by a notice issued on 26th November, the Imperial Chancellor subordinated to it the organisation which had been responsible for the reconstruction policy since August, 1916. This was the Office of the Imperial Commissary for Transition Economy. By tracing the history of this Commissary, a fairly clear grasp of the machinery set in motion for reconstruction, and the extent of its activities, can be obtained up to the end of 1917.

SPECIAL ARTICLES—*continued.*

OFFICE OF IMPERIAL COMMISSARY.

The Office of the Imperial Commissary was established by a Bundesrat Order of 3rd August, 1916. His particular function was stated to be "to regulate the import of goods and their distribution according to the instructions of the Imperial Chancellor." The Commissary was to be supported by necessary colleagues, and an Advisory Committee, consisting of representatives of the Imperial authorities, the Federal Governments, and a number of experts. He himself was to work under the supervision of the Chancellor, and the Secretary of State for the Interior was President for the Advisory Committee. It was laid down that the Committee must be heard on all questions of principle. Other particulars would be settled by the Imperial Chancellor. The Commissary was empowered to require all persons to give information on economic questions and to submit their business correspondence, their books and their warehouses to inspection.

FUNCTIONS OF THE OFFICE.

At a meeting of the Reichstag Committee on Trade and Commerce, held on 14th October, 1916, Dr. Helfferich, Finance Minister, gave a further explanation of the Office. He stated that the return to a peace economy would take place under State direction. The principal tasks of the Commissary would be to bring back soldiers to civil life; to care for the disabled; to provide the necessary work for them; to eliminate women and children from the labour market; and to bring into force again the protective labour laws that had been partially repealed. In regard to capital, his chief aims would be to utilise and extend production to the uttermost and to exercise the strictest economy; to lay up reserves of capital for the peace period; to create credit on the security of real and personal property; to offer credit to urban property owners and shipping companies; to revive trade; to improve the currency; and to make liquid the capital locked up in war loans. He added that the Imperial Secretary of the Interior divided the problems into three main branches—labour questions, the creation of credit, and the provision of raw materials. He concluded by stating that the Imperial Commissary would occupy himself, at first, with raw materials, transport and the currency; and while the requisite changes would be brought about by legislation and administrative action, the co-operation of all who were affected would be organised and utilised—that is, a large advisory body of specialists would review the problems of currency, shipping finance, trade, industry, etc.

EXPERIENCE IN WORKING.

According to the latest information the province of the Imperial Commissary has been restricted to the supply of raw materials and foodstuffs, exchange matters, and the supply and distribution of tonnage. Its inner organisation consists of two advisory councils, one of which is composed of eight administrative experts. More importance attaches to the greater council of over 250 members, which is described as the "Transition Economy Parliament." This is divided into twenty-one sub-committees, dealing with finance; transport; iron and manganese ores; lead, antimony, zinc, tin, nickel, copper, chrome, wolfram and molybdenite ores; cotton, wool, matting fibre; silk, rags and worn fabrics; fodder, bread-corn, meat and livestock; vegetable and animal oils and fats; resins; skins, hides, leather and tanning materials; rubber; cocoa, coffee, rice; coal; and lastly pyrites and phosphates.

The enumeration of these committees affords at once an accurate picture of the scope of the labours of the Commissary. Their members include the leading financial and commercial men, as for example the Finance Committee, which is composed of fifteen of Germany's greatest bankers, and among them eight of Berlin's chief financial magnates.

SPECIAL ARTICLES—*continued.*

ABSORPTION INTO THE MINISTRY OF ECONOMICS.

During the latter half of 1917 the Imperial Commissary has not come so prominently under notice. The reason for this is probably to be found in the establishment of the Imperial Ministry of Economics, which has taken over the functions of the Ministry of the Interior, so far as they concerned trade, economics and social questions—each of these three departments being placed under a separate under-secretary, with the Imperial Commissary as a subordinate department. Both the Ministry of the Interior and the Imperial Commissary have consequently been relieved of work which tended to overburden them, while their future co-operation in their respective branches is expected to make for expedition in the execution of their tasks.

There are, of course, several minor departments detailed for specific reconstruction work. These have, however, been brought under the Imperial Ministry of Economics, together with the Imperial Commissary. A great deal of criticism has also been raised on the subject of these new departments and their policy, and a description of them will be given from time to time in subsequent articles.

Notes on Trade.

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

SERBIAN COMMERCIAL AND INDUSTRIAL MISSION.

The idea of the Serbian Commercial and Industrial Mission, the members of which are at present in London, arose through a keen desire on the part of leading Serbians to develop close relations with the United Kingdom. They wished to experience British life and see British industries at close quarters. Often in the past it has been humiliating for Serbians to have their orders refused by both English and French manufacturers for totally inadequate reasons. Germans and Austrians have fostered the idea in other countries that Serbian credit was bad, and that Serbian merchants were unreliable, with the tricky design of securing Serbian business for themselves by offering seductive conditions of long terms, bills, etc. Serbia now wishes to emancipate herself from the debilitating influences of her northern neighbours, for it is clearly realised that they have very seriously retarded the commercial and economic development of the country. Hence to wrench herself from the position of dependency upon the Central Powers she desires that her economic life should be closely knit and identified with that of the Allies, particularly with that of the United Kingdom. The delegates rather regret that so few Serbian children are being educated in the United Kingdom, and would greatly welcome any suggestions or measures for educating a larger number of young Serbians here, because in course of time they would become valuable exponents of British methods and interpret the meaning of British institutions. It is desired to interest British capitalists in the lucrative investments for money in Serbian mines, in harnessing water-power, in building railways, opening up roads, etc. When, as is anticipated, Serbia secures a port, it is hoped that the United Kingdom will establish a regular line of steamships between the two countries. A vast amount of material will be required after the

NOTES ON TRADE—continued.

war, such as agricultural machinery, steel rails, locomotives, machinery of all kinds, boots and shoes, textiles, livestock, and they now look to the United Kingdom to supply the bulk of their needs. The delegates much desire during their tour to enter into concrete relations with British manufacturers with a view to prosecuting active reciprocal trading after the war. They would like to establish in London a strong Anglo-Serbian Committee with sub-committees in the different provincial centres.

Reference was made in last week's "Journal" to the London engagements of the Serbian Commercial and Industrial Mission. The Mission arrived in Birmingham from London on 22nd January. On the 23rd January the party entrained for Coventry, where they were received by the Mayor, who welcomed them in the name of the people of Coventry. The first works to be visited were those of the Daimler Co., Ltd., where the Serbian delegates took the keenest interest in all they saw. A luncheon was given to the Mission by the Chairman of the Daimler Co., and interesting speeches were delivered by Mr. Manville, on the part of the company, and by Dr. Djuritch, on behalf of the Mission. In the afternoon a visit was made to Messrs. J. and J. Cash's works, where the delegates were shown the manufacture of smallwares, etc. On the following day—January 24th—the Mission was received by the Lord Mayor of Birmingham, after which the delegates motored out to the works of the Austin Motor Co. Here a full morning was spent in viewing those important works. After lunch, which was provided by Sir H. Austin, the Mission left for Messrs. Gillott's pen factory, where a most instructive afternoon was spent.

In the morning of the 25th January the delegates visited the factory of the Birmingham Small Arms Co., Ltd., where they were particularly impressed by the automatic machinery installed. This visit was followed by a luncheon given by the Birmingham Chamber of Commerce. In the afternoon the delegates were shown over the works of Messrs. Cadbury Brothers, at Bourneville, and were afterwards entertained to tea by the management. On the 26th January the works of Messrs. Joseph Lucas, Ltd., of Birmingham, were visited and the delegates were greatly interested in the manufacture of military and naval lamps, dynamos and magnetos made there. On the same day the delegates left for Manchester, after being entertained to a luncheon given in their honour by the local branch of the Federation of British Industries. The arrangements for all the above visits were most kindly drawn up by the Birmingham and Coventry Chambers of Commerce, and it is due to the efforts of the Presidents and Secretaries of these two Chambers that this full and interesting programme was able to be carried out.

PROHIBITION ON SENDING REMITTANCES OUT OF THE UNITED KINGDOM.

With reference to Defence of the Realm Regulation 41b, attention is called to the fact that the opening of credits in any form by banks, bankers, merchants, correspondents, or agents in the United Kingdom for account of customers abroad, if not for the express purpose of purchase or movement of merchandise, may result in transference of money abroad for purposes other than those permitted by the above Regulation. The Regulation applies not only to bankers, but to all persons in the United Kingdom accepting bills drawn abroad or granting credits in favour of persons resident outside the United Kingdom. It will, therefore, be necessary for persons granting credits to satisfy themselves that the drawings made upon them are for purposes permitted by the Regulation.

NOTES ON TRADE—continued.**SPECIAL COMMISSIONS AND COMMITTEES.**

The Ministry of Reconstruction has issued a list of Commissions and Committees set up to deal with questions which will arise at the close of the war. The list, which is revised to 8th December, gives the personnel of and the terms of reference to the various bodies which have been appointed to examine into and report upon such questions as trade development, finance, raw materials, coal and power, scientific and industrial research, demobilisation, and disposal of stores, labour and employment, agriculture and forestry, public administration, housing, education, aliens, and legal questions. Since the list was issued a further important Committee has been established, namely, a Committee to consider the provision of new industries for the engineering trade, a notice respecting which appears in the "Government Notices Section" of the present issue of the "Board of Trade Journal." The list referred to may be obtained through the usual sources, at a cost of 4d. per copy (5d. post free), the reference number being Cd. 8916.

OUTPUT OF MERCHANT TONNAGE.

That there has been a considerable increase in the output of merchant tonnage is demonstrated by a diagram, recently issued through the Press Bureau, showing strictly to scale the development, quarter by quarter, for the years 1916 and 1917, of the output of merchant vessels in United Kingdom shipbuilding yards. The diagram has been widely reproduced in the Press, and is, therefore, not republished in the "Journal." The increase in merchant tonnage from the United Kingdom shipbuilding yards formed the subject of a statement made in the House of Commons on 13th December by the First Lord of the Admiralty, and the general curve of increasing output referred to by him is apparent in the diagram. The division of functions with regard to the provision of tonnage is as follows:—The Admiralty Controller is responsible for the placing of contracts for the building of ships, while the Shipping Controller has the disposal and allocation of ships available and the arrangement of priority cargoes; that is to say, the production of tonnage (building) is under the Admiralty, while the allocation of tonnage is under the Shipping Controller.

BRITISH CHAMBER OF COMMERCE AT HARBIN.

H.M. Consul at Harbin writes calling attention to the existence of the British Chamber of Commerce at that place. The Chamber, which was formed last May, has for its objects the promotion and protection of British trade interests by ensuring the co-operation of British trade interests in Northern Manchuria. The Hon. Secretary of the Chamber is Mr. A. E. Smith, who may be addressed at the British Chamber of Commerce, Harbin.

BRITISH VICE-CONSULATES CLOSED.

The Foreign Office notify that the British Vice-Consulate at HERNOSAND, SWEDEN, has been abolished for the duration of the war, and also that the Vice-Consulate at BISSAU, in PORTUGUESE GUINEA, has been closed.

IMPORT RESTRICTIONS.

With reference to the Consolidated List of Interpretations of the Import Restrictions, which appeared as a supplement to last week's "Board of Trade Journal," it should be explained that the decisions contained in the list are only in reply to queries raised. The list does not claim to be exhaustive, and accordingly the exclusion of any article therefrom does not necessarily signify that its import is not prohibited.

Imperial and Foreign Trade.

NEW ZEALAND.

MARKETING HARDWARE GOODS.

H.M. Trade Commissioner in New Zealand has called attention to certain matters in connection with the hardware trade which should prove of interest to United Kingdom manufacturers desirous of extending their business in New Zealand after the war. He states that, although United Kingdom manufacturers of hardware enjoy the greater share of the trade in New Zealand, foreign-made goods are usually employed for the purpose of window and shop displays, the reason being that, generally speaking, they present a more attractive appearance than do British goods, whether shown loose or in packages. This constitutes a valuable form of advertisement for foreign-made goods, and results in sales to which in many cases their real merit does not entitle them when compared with United Kingdom goods of a like kind and of equal price.

Another feature of certain foreign hardware goods marketed in New Zealand, and one which materially assists sales, is the fact that they are frequently put up in such a way that they pack more neatly on shelves than do British goods, and, consequently, they are more readily handled by salesmen.

Considerable importance attaches to the questions of finish and packing as affecting sales of hardware goods, and, while these features will not deceive the artisan, who can judge quality, it should be borne in mind that a large number of buyers are not in a position to discriminate as to quality and are frequently guided solely by appearance in their choice of goods.

These suggestions are, of course, only made with a view to trade when conditions are more normal as regards material and labour.

NIGERIA.

FEEES UNDER THE COMPANIES ORDINANCE, 1912.

The official "Nigeria Gazette" of 22nd November states that the following fees will be charged under Section 224 (5) of the Companies Ordinance, 1912:—For inspecting any documents kept by the Registrar, 1s.; for each certificate of registration, 5s.; and for a certified copy of, or extract from, any document, for each folio, 6d.

SOUTH AFRICA.

PROJECTED FACTORY AND WAGES LEGISLATION.

A "Government Gazette Extraordinary" of the Union of South Africa, dated 22nd November, publishes the text of the Factories Bill, 1918, and of the Regulation of Wages (Apprentices and Improvers) Bill, 1918. Both these Bills are Government Bills and they will be brought before the Union Parliament for consideration during the present Session.

The first-named Bill is to provide for the regulation of factories and for other purposes incidental thereto. The first clause defines, for the purposes of the Bill, a "factory" as any premises in which, or in connection with which, steam, electrical, or other mechanical power or appliance is used for the purpose of preparing or making goods for trade or sale, or articles of food and drink for sale for human consumption, or for the purpose of washing, cleaning, or dyeing any article of wearing apparel. There is a proviso that the provisions of this Bill shall not apply to any mine, as defined by Act No. 12 of 1911 or any amendment thereof, but shall apply to works as therein defined in so far as the same may be a factory. The Bill provides for the registration of factories (premises are not to be used as a factory until registered) and the appointment of factory inspectors; it regulates employment; makes provision for the prevention of sweating in factories, etc.; and further provides that certain sections of the Bill shall apply, *mutatis mutandis*, to workshops and wholesale warehouses. The Governor-General will also be empowered to make regulations under the Bill.

The second Bill referred to is to provide for the establishment of wages boards; for the regulation of the wages of women and young persons, and the employment of apprentices and improvers in certain specified trades or occupations; and for other purposes in connection with any of those matters. The Bill applies to the following

IMPERIAL AND FOREIGN TRADE—continued.

trades and occupations:—(1) Assisting in a shop or store in which any goods, wares or merchandise are sold, or in any tea-room or restaurant; (2) tailoring, dressmaking, boot and shoemaking, and the making of any other article of wearing apparel; (3) harness making; (4) the manufacture of sweets and confectionery; (5) soaps and candle making; and (6) cardboard and box-making. This schedule may at any time be added to by proclamation, and the Governor-General will also be empowered to make regulations under the Bill.

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

"GERMAN EAST AFRICA."

EXTENSION OF AREA OPEN TO TRADE

The "Official Gazette" of the Zanzibar Government of 19th November publishes as a Government Notice a notice by the General Headquarters, East African Expeditionary Force, in the territory known as "German East Africa," to the effect that as and from 1st January, 1918, all towns in that territory on the Central Railway from Dar-es-Salaam to Tabora, both inclusive, would be open to trade.

Individuals and firms desirous of opening up business should apply to the Senior Political Officer, Dar-es-Salaam, for traders' licences. They will have to make their own arrangements for shipping and landing cargoes, also for the leasing of premises. Railway transport will be available as and when military requirements permit.

The above is published in continuation of many notices relative to the regulation of trade in "German East Africa" which have from time to time appeared in the "Board of Trade Journal," the latest of which will be found on p. 404 of the issue of 22nd November last.

CHINA.

COMMERCIAL REPORT ON SHENSI PROVINCE.

H.M. Pro-Consul at Tientsin has furnished the following report on matters of commercial interest suggested to him by his observations during a journey through Shensi Province. In reading the report it should be borne in mind that Shensi is one of the more remote provinces of China, and that its future development depends upon the establishment of communications. The remarks which follow will therefore be of more particular interest to traders who have, or intend to set up, their own distributing and collecting organisation in China.

While Shensi admittedly offers fewer opportunities for foreign trade than many other Chinese provinces, it is by no means a poor region as regards products, and contains a comparatively large population sufficiently wealthy to be able to satisfy their foreign wants if they get the opportunity. On the central plains the people are generally speaking well to do, and in the south they are exceedingly prosperous, and probably as rich as anywhere in China.

TRADE CENTRES.

There are three centres which may be worth more attention than they receive from British merchants, namely Hsingan and Hanchung in the South (Han River basin), and Sian in the centre (Wei River basin). Hsingan and Hanchung will be tapped by the projected American railway from Laohokou up the Han River; Hanchung is also on the line of the T'ung Ch'eng (Shansi-Szechuan) railway; and Sian is the immediate objective of the Lung Hai (Kiangsu-Kansu) railway, which has for the time being come to a stop at Kuanyint'ang in Honan, three days journey from the Shensi border. If Shensi is ever to be opened to foreign trade, these three centres will be the trade marts of the future.

Sian is a huge city, one of the largest in China, and comparable in many ways to Peking before the introduction of modern improvements there. But it is much more the economic centre of the region in which it lies; it is without a rival of any kind as the political and commercial centre of the Wei basin.

THE WEI BASIN.

This basin is the greatest agricultural region of North China and produces very large quantities of its two chief staple products, wheat and cotton. Recently a great deal of indigo has also been cultivated, owing to the scarcity of foreign dyes, so that it might be said that at the time

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the visit was paid the best irrigated land was devoted to indigo, the alluvial plains without irrigation to cotton, and the uplands to wheat. Vegetable oil and hemp are two products for which certain districts are noted. Coarse silk is also produced in Central Shensi, chiefly in the districts south of the Wei River.

Wheat is the chief crop of the Wei basin, and in a belt crossing the Province from east to west, north of Ch'inglingshan, it is grown on a Canadian scale. In this zone one can ride for days across undulating loess prairies which form one vast wheat field. The wheat produced is the best in China, and in normal years there is a large surplus available for export. Some of it goes to Honan, but in the absence of waterways and railways it is difficult and expensive to move the harvests any distance.

Cotton has always been one of the staple products of the plains of the Wei Valley, and is nowadays being increasingly cultivated. The Japanese purchase it extensively and their agents have lately become more and more energetic in buying up the crops. According to Japanese buyers, the Shensi cotton is the best in China, and the quantity and quality of the crops are capable of being greatly increased and improved. The best cotton country consists of the plains along the Wei River and its tributaries, including such districts as Sanyuan, Kaoling, Chingyang, Lintung, Weinan, etc.

Mules from another valuable article of export from Central Shensi, and the Province ranks as the first in China for the quantity and the quality of the mules it produces, which are exported to the neighbouring provinces. The loess upland country of Central Shensi is the principal breeding ground for these mules, including districts like Wukung, Fupeng, Ch'ishan, Fenghsiang, etc.

TRADE IN SIAN DISTRICT.

Except for one trading concern, an occasional pill merchant, and the small Japanese trader, the foreign import trade of Sian is entirely in Chinese hands, but the local merchants profess to be anxious to see more of foreign trade than they do, and to be keen on working up business connections with foreign firms for the interchange of articles of export and import, especially all kinds of machinery. Sian, one of the biggest cities in China, is still without an arsenal, electric light, waterworks, cotton mills, or factories of any kind, so that there ought to be some valuable contracts to be secured in the near future by any firm which is enterprising enough to go and look for them. The city is certain to insist on having its own arsenal sooner or later. Electric light is, of course, a general subject of conversation amongst progressive citizens. As regards waterworks, the water from most of the wells in the city is brackish and scarcely potable in dry weather, a fact which is only too well realised by the local Chinese, for good water is laboriously distributed by hand throughout the city from a few sweet wells; and yet any number of clear mountain torrents emerge from the Ch'ingling mountains some ten miles to the south of the city and traverse the plain to flow into the muddy Wei River. There is also a great opening in connection with the construction of a motor road from T'ungkuan to Sian, a subject which is discussed later, and the presence of waterpower in the mountains close at hand indicates the possibility of all manner of more ambitious schemes connected with electricity, such as tramways, etc.

Sian in addition to being the collecting and distributing centre for Central Shensi, is one of the chief gateways to and from Kansu and the north-west hinterland, whence come hides, skins, furs, felt, wool, tobacco, medicines, musk, etc., in large quantities for export to all parts of China and beyond. Since the construction of the Lung Hai Railway westwards from Hohanfu to within three days journey of the Shensi border, trade and traffic between Sian and the eastern provinces is mostly confined to the T'ungkuan road to the railhead and thence by the Peking-Hankow railway to the coast. In normal times there is a continual procession of large carts along this road conveying export produce to the coast. The old route south from Sian by pack mule across the Ch'inglingshan to Lungchuchai or Chingtzukuan on the Tan River, and thence by boat via Laohokou and the Han River to Hankow, has been largely given up as far as Central Shensi is concerned. The journey from Hankow to Sian via T'ungkuan now takes from eight to ten days only for a passenger.

HSINGAN AND HANCHUNG.

Hsingan and Hanchung are the two commercial centres of the Han basin, which is a self-contained region isolated from the rest of Shensi by the nearly impassable barrier of the Ch'ingling mountains.

Hsingan is commercially the more important as it is the gateway in and out of this region. Hanchung is the seat of the northern capital and *Taoyin* is the administrative capital. As regards its physical features, population, products and climate, the Han basin is really a portion of Szechuan; it is like a miniature edition of that Province with the Han River, Hsingan, and Hanchung corresponding to the Yangtze, Chungking, and Chaengtu.

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THE HAN BASIN.

The Han basin is a region of mountains intersected by very fertile valleys and small plains, the chief of the latter being the famous Hanchung plain, which rivals that of Chengtu in fertility and wealth. The staple crops of these valleys and plains are rape and wheat, followed by rice and cotton. Silk of rather inferior quality, but in great demand in provinces like Kansu, is another important product, especially from the districts of Nanyin, Hsihsiang, and Hanchung. The lower slopes of the mountain are thickly dotted with walnut, fruit, wood-oil and varnish trees. The varnish is bought largely by the Japanese; and the wood-oil, which is nowadays a most important article of export, by the Americans. A coarse kind of tea, in which there is quite a large Chinese trade, comes from the district of Tzuyang. Medicines, vegetable wax, paper, hemp, bristles, hides, feathers, bean oil, seed oil, straw braid, edible fungus, etc., are other products, as well as those above-mentioned, which are exported from Hsingan to Hankow. Apart from the merchants, there are many rich, land-owning gentry who ship their own stuff in their boats to Laohokou and Hankow. The people are generally speaking probably wealthier than anywhere else in China, and in the Hanchung plain rice is cheaper even than in Szechuan.

RESOURCES AND TRANSPORT.

Hsingan with its comparatively good water communications with Hankow has some claim to be considered worth opening as a Treaty Port, even before the arrival of the American railway. It acts as a collecting and distributing centre for the whole of the Han basin, and is about the most important interior mart on the Han, the Yangtze's longest tributary. According to Chinese reports, copper, asbestos, and iron are found in the neighbourhood, and there is certainly plenty of good coal. Unfortunately, the Han appears to be a hopeless proposition for steam navigation, owing to the rapids, shallows and freshlets, but there is a huge junk traffic with Hankow—much of it without transhipment *en route*. Hsingan lies below the worst rapids, which occur between it and Hanchung, particularly below Yang Hsieu. It is also almost in water communication with Chungking through Szechuan, the head of navigation on the Han River, being only two days portage from the head of navigation on the Chialing River which flows from Western Shensi due south to Chungking.

Like Sian, Hsingan and Hanchung are without any of the conveniences of modern civilisation, and machinery of any kind is almost unknown. With the arrival of the railway, or before, there will be a very rapid development of these rich cities.

LANCHOW (KANSU PROVINCE).

Lanchow is another centre which is worth a visit from the point of view of selling piece goods, dyes, cloth for Thibetans, machinery for the arsenal, wool factory, copper mines, etc., though it is admittedly a long journey at present.

NORTHERN SHENSI.

As regards the north of Shensi, there is at present nothing to be done there, as, apart from its being in any case a very poor region, it has of recent years been so utterly devastated by brigands that trade has been quite destroyed. Goat skins and wool, much inferior to that of Kansu, are the chief products, and the only two towns where any trade is done even in normal times are Yuling and Suitechow, the latter on the high road from Taiyuanfu in Shansi to Ninghsiafu in Kansu; Yuling is a collecting and distributing centre for the country of the Urdos Mongols.

MINERAL WEALTH OF SHENSI.

With regard to the mineral wealth of the Province, great hopes were at one time entertained of the oil deposits in the north, but, according to the American experiments of 1914-16, they are too poor to be worth exploiting. The original well at Yench'ang, opened with Japanese assistance and machinery some eleven years ago, is still working, and flourishes in a small way. They sell as much oil as they can refine and transport, principally in North Shansi across the Yellow River. Iron is mined and smelted in the Western Han basin, and in the north, and the Chinese allege that they have found extensive unworked deposits near Hanch'eng, on the Yellow River, in the vicinity of coal, and water communications. Coal is mined almost everywhere in the loess mountains of the north for local consumption, but lack of means of communication renders it useless for other purposes. Central Shensi and the Northern Ch'inglingshan are apparently without coal, and supplies are imported up the Wei River from Shansi. The eastern end of the Han basin contains an extensive coal field, and, according to Chinese reports, also copper and asbestos. The sands of the Han contain a little gold.

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PROPOSED CONSTRUCTION OF MOTOR ROADS.

There is an opening in Shensi in connection with the construction of motor roads through the thickly populated plains in the centre of the Province. No work beyond rough preliminary surveying has yet been commenced on any railway in Shensi, and under existing conditions it does not appear likely that anything will be done for many years. The Chinese, officials, merchants, and gentry, in Shensi and Kansu are nowadays keenly alive to the vital necessity of improving their methods of transport, and they realise that the absence of proper means of communication is a great hindrance to any real progress, checks the expansion of their trade, and encourages brigandage and political instability. Failing railways, the construction of a few trunk roads for motor transport would be a great boon to the Province, and would be likely to prove a profitable undertaking for a competent foreign firm which could obtain a contract therefor, including the supply of motor vehicles and the management of a regular motor service. Nor would the construction of such roads prove at all difficult where they are most wanted, that is to say, in the Wei basin, with a plentiful supply of cheap labour available in the agricultural off season, and plenty of rock in the Ch'ing-ling mountains close at hand.

For a beginning a proposition ought to be placed before the Provincial Authorities for the construction of a macadamised road, not a mud track which melts after a few rains, and the supply of cheap motor cars and motor lorries to ply thereon. The success of such a scheme is assured, and once the road is built its extension east to Honan to railroad, and west to the borders of Kansu and beyond, would soon follow, and a great market for motor cars and lorries would arise. The only condition of success is that the road should be constructed and maintained by foreign engineers. Ten years ago a well-graded cart track was built through the mountains of the north for the transport of the Japanese oil-drilling machinery. This road could easily be converted into a motor track. It is now abandoned, as it leads nowhere and is no longer required. But it is an example of the ease with which a road can be built, even through mountainous country, in a case where the Chinese, lacking foreign assistance, would have only a mule trail.

The same interest in improving means of communication was noticeable in Kansu two years ago, where, however, the difficulties in the way of road making are much greater, owing to the great distances and absence of plains. Yet in normal times an almost constant procession of carts struggles backwards and forwards along the high road between Sian and Lanchow, this being one of the main routes followed by imports and exports to and from Kansu and its enormous hinterland (though still more stuff certainly goes via Kueihua and Paot'ou—Northern Shansi and Mongolia). If a motor road were built from the railroad in Honan through the plains of Central Shensi, its extension to Lanchow along the existing cart track would certainly follow, thus anticipating the railway by decades.

COLOMBIA.

AMENDED PACKING HOUSE LAW.

H.M. Minister at Bogota reports the publication in the "Diario Oficial" of 23rd November of an amended Law regarding packing houses in the Republic. It is provided, *inter alia*, that a total subsidy amounting to £10,000—extended over a period of ten years—shall be paid to the first person or company establishing a packing house under certain conditions on the Atlantic coast of the Republic. In order to qualify for this subsidy the sum of £150,000 has to be advanced as a loan to cattle breeders and cattle fatteners, at an interest of not more than 9 per cent. per annum, and for a period of not less than five years. The packing house has to be of such dimensions as to be able to handle not less than 50,000 head of cattle and 2,000 smaller animals a year. The Law also applies to the erection of a packing house on the Pacific coast of the Republic.

English, French and German translations of the Law are to be officially made.

British firms interested may consult the full text of the above-mentioned Law (in Spanish) in the Enquiry Office of the Department of Overseas Trade (Development and Intelligence).

[NOTE.—The amended Law is No. 60 of 1917; a notice respecting the Law which is amended (No. 21 of 1916) appeared on p. 442 of the "Board of Trade Journal" of 9th March, 1916.]

IMPERIAL AND FOREIGN TRADE—continued.

FRANCE.

REGULATIONS AFFECTING TRADE.

The following Decrees and Orders relative to trade have appeared in recent issues of the French "Journal Officiel":—

ROAD CONSTRUCTION: PERIOD EXTENDED.

A Law, dated 29th December (published 30th December, extends to 31st December, 1918, the time for carrying out the works of secondary road construction ("travaux de vicinalité") included in the programmes of 1912-13-14-15.

REQUISITION AND CENSUS OF CERTAIN COMMODITIES.

A Presidential Decree, dated 21st December (published 22nd December), provided for the requisition of all stocks of pure or mixed wool or cotton tissues. All holders of more than 500 kilogs. of cotton tissue or of more than 500 kilogs. of woollen tissues of certain specified categories, existing in France or Algeria on 31st December, 1917, were required to make a declaration of such stocks before 15th January, 1918. Another Presidential Decree, of the same date and publication, provided for the requisition of resinous products, gums, pitch, turpentine, etc. All holders of stocks of more than 1,000 kilogs. of resinous products, etc., existing in France or Algeria on 25th December, 1917, were required to make a declaration of such stocks before 31st December, 1917. A further Presidential Decree, dated 2nd January (published 3rd January), provided for the requisition of preserved milk (whether concentrated, condensed, in powder, etc.). All holders of stocks of more than ten cases of 48 tins of preserved milk existing in France or Algeria on 10th January were required to make a declaration of such stocks before 15th January.

PARCEL POST RATES TO CERTAIN EXTRA-EUROPEAN COUNTRIES.

A Presidential Decree, dated 5th January (published 8th January), fixed the parcel post rate on parcels sent from France, Corsica, and Algeria, and the French agencies and offices in Morocco and China to the Dutch West Indies, Portuguese Colonies in Africa, Brazil, New Caledonia and dependencies, the French Establishments in Oceania, British and Dutch Guiana, Bolivia, Chile, Peru and Ecuador.

STAMP TAXES ON DOCUMENTS.

A Presidential Decree, dated 20th December (published 28th December), authorises the issue of certain stamps for the administration of Article 40 of the Law of 31st July, 1917 (being taxes on business profits, etc.—see p. 463 of the "Board of Trade Journal" of 30th August last), and prescribes the manner of their cancellation.

STATE CONTROL OF SHIPPING.

A Presidential Decree, dated 22nd December (published 3rd January), establishes complete State control over all vessels of the French mercantile marine by placing them under the direct orders of the State. In the "Report to the President," accompanying the Decree, the Minister of Commerce, etc. remarks that although the control by the State of the mercantile marine was in a measure secured by the system of licences established by the Decrees of 17th July, 1917 (see p. 236 of the "Board of Trade Journal" of 2nd August last), and 29th September, 1917 (see p. 144 of the "Board of Trade Journal" of 18th October last), yet in practice it was found that ship-owners did not sufficiently realise that their ships and all cargo space therein were put under the direct orders of the State. The present Decree, therefore, provides for the total utilisation of the vessels for and by the State. A future Decree of the Under-Secretary of State for Maritime Transport will decide the means by which this centralisation will be effected.

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

PORTUGAL.

CARGOES EX ENEMY VESSELS.

H.M. Minister at Lisbon reports that the "Diario do Governo" (Lisbon) of 29th December published a correction of Article I. of the Ministerial Order, made on 27th November, elucidating the provisions of Decree No. 3,246 of 13th July, relative to cargoes ex enemy

IMPERIAL AND FOREIGN TRADE—continued.

vessels in Portuguese harbours. Article I., as corrected, now reads as follows:—

“That the delivery orders issued by masters and agents of ships shall be considered as equivalent to those issued by the shipowners for the purposes of Article I. of the above-mentioned Decree in accordance with Article 509 of the Commercial Code and the official regulations respecting shipping agents.”

[NOTE.—Notices of the above-mentioned Decree and Order were published in the issues of the “Board of Trade Journal” for 13th July last and 13th December.]

RUSSIA.

REQUISITION OF AGRICULTURAL MACHINERY AND IMPLEMENTS.

H.M. Commercial Attaché at Petrograd reports that the existing Government has published a Decree placing all agricultural machinery and implements at their disposal. The Decree has been issued with a view to supplying the agricultural needs of the country with the implements of production, and all agricultural machinery and implements manufactured, or being manufactured, in Russia, as also those imported from abroad, are required to be placed at the Government's disposal as from the date of promulgation of the Decree, namely, 30th November-13th December, 1917.

SOUTH AND CENTRAL AMERICA.

REGISTRATION OF TRADE MARKS.

The Liverpool Chamber of Commerce announces that the special representative of the South and Central American Trade Section has made arrangements which greatly reduce costs of registration of trade marks in Latin America. The following is a list of quotations (inclusive of all charges) at which manufacturers and traders may now have their trade marks registered:—

	£	s.	d.		£	s.	d.
Argentina	...	14	0	Honduras	...	12	10
Bolivia	...	11	18	Mexico	...	5	18
Brazil	...	10	12	Nicaragua	...	11	0
Chile	...	6	19	Panama	...	18	8
Colombia	...	12	0	Paraguay	...	11	17
Costa Rica	...	11	4	Peru	...	6	15
Cuba	...	11	8	San Salvador	...	11	10
Ecuador	...	13	17	Uruguay	...	14	10
Guatemala	...	12	0	Venezuela	...	8	17

British firms trading with the Latin American Republics are advised to register their trade marks in these countries. The names of British trade mark agents who are willing to act on the above-mentioned terms may be obtained on application to the special representative of the South and Central American Trade Section, Liverpool Chamber of Commerce, Exchange Buildings, Liverpool.

TRADE MARKS IN ARGENTINA.

The Department of Overseas Trade is informed that the British Chamber of Commerce in the Argentine Republic is prepared, through its official trade marks agent, to undertake the registration of an ordinary trade mark in Argentina for ten years at a cost of £11. This price does not include the costs on this side.

Applications should be addressed to the Secretary, British Chamber of Commerce in the Argentine Republic, Calle Reconquista 46, Buenos Aires.

SPAIN.

FOREIGN MATERIALS FOR GOVERNMENT CONTRACTS.

The “Gaceta de Madrid” of 28th December contains the list, published annually, of the various classes of material which may be required by Spanish Government Departments, and in the supply of which foreign competition will be permitted during 1918. Among the important items are the following:—Foreign timbers; bitumen; mineral oils and greases; coal for naval purposes, including anthracite; specified kinds of manufactured steel and wire; steel rails exceeding 50 kilogs. per lineal metre; metal chains; tubes and cables; anchors; tin, nickel, aluminium, platinum, bronze and copper goods; steam turbines; gas engines exceeding 300 h.p.; steam boilers; dredgers; machine tools; machines connected with the tobacco, printing, lithographic, quarrying, metal, etc., industries; weighing machines; bicycles; electrical laboratory apparatus; electrical measuring instruments; telegraph and telephone appliances; electric search-lights; submarine cables;

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electric lighting accessories and arc lamps; electric generating machinery; gas lighting appliances for railway carriages; fire extinguishing and life-saving appliances; munitions of war, such as explosives, shells, ammunition, pistols, as well as arsenal machinery; aeroplanes; scientific instruments; maps and atlases; drawing paper and models; colours; marble and special glass; sanitary and drainage appliances; heating, ventilating and disinfecting apparatus; medical and surgical appliances; lighthouse accessories; chemical products; linoleum; and musical instruments.

The “Gaceta,” containing the detailed list (in Spanish), may be consulted by United Kingdom manufacturers and exporters at the Department of Overseas Trade (Development and Intelligence).

PROJECTED RAILWAY FROM ZAFRA TO VILLANUEVA DEL FRESNO.

H.M. Embassy in Madrid reports that the Madrid Official Gazette of 17th December published a notice extending the period in which tenders may be presented for the strategic railway from Zafra to Villanueva del Fresno until 6th February.

The above remark apparently refers to a competition of plans for a railway from Zafra to Villanueva del Fresno, *via* Jerez de los Caballeros, reported on p. 551 the “Board of Trade Journal” of 7th June last. The projected line will start from Zafra, forming a junction there with the lines from Zafra to Huelva and Mérida to Sevilla, and will follow a general direction of east to west, passing by Jerez de los Caballeros, and terminating at Villanueva del Fresno. The railway will have a gauge of 1.672 metre.

The plans for the proposed railway must be delivered at the Ministerio de Fomento, Madrid.

A translation of the original notice containing the conditions of the competition may be consulted by British firms interested at the Department of Overseas Trade (Development and Intelligence).

PROPOSED CONSTRUCTION OF LOCOMOTIVES AT BARCELONA.

H.M. Embassy in Madrid also reports that a Spanish firm, the Sociedad Maquinista Terrestre y Maritima, of Barcelona has increased its capital from 3,500,000 pesetas to 20,000,000 pesetas for the purpose of adapting its works to the construction of locomotives.

SWEDEN.

ORDER FOR RAILS PLACED IN GERMANY.

According to a statement in the Swedish Press, to which the attention of the Board of Trade has been directed, the State Railway Board has been authorised to make an agreement with the Stahlwerksverband A.G., in Germany, for the delivery of 80,000 tons of rails and fish-plates. It appears that deliveries are to be made in three equal portions, extending over the current year and the two following years. Half the purchase money is to be paid over on signing the contract. It is also stated that the Railway Board is applying for an advance of 11,600,000 kronor (about £644,000 at par exchange) to meet the expenditure. There is at present a great shortage of rails in Sweden.

UNITED STATES OF AMERICA.

REPORT OF THE UNITED STATES TARIFF COMMISSION.

The Board of Trade are in receipt, through the Foreign Office, of a copy of the first Annual Report of the United States Tariff Commission to Congress, for the year 1916-1917. The following is a statement of the work of the Commission, summarised from the Report. A copy of the Report may be seen by persons interested at the Department of Overseas Trade (Development and Intelligence).

DUTIES OF THE COMMISSION

The Commission was created by the Act of 8th September, 1916, and, briefly stated, its duties are the investigation of the administration and the fiscal and industrial effects of the Customs Laws of the United States, and, in general, of the operation of the Customs Laws, including their relation not only to the Federal revenues, but to the industries of the country. The Commission is required to put at the disposal of the President of the United States and of the appropriate Committees of Congress all information at its command, and to make such additional investigations and reports as may be requested by the

IMPERIAL AND FOREIGN TRADE—*continued.*

President, or by the Committees. It has power, further, to investigate the tariff relations between the United States and foreign countries, commercial treaties, preferential provisions, and economic alliances, and the conditions and causes relating to the competition of foreign industries with those of the United States.

The Commission was organised by the end of March, 1917, and, consequently, during the fiscal year, has been in existence for a period of three months, from 1st April to 1st July, 1917.

INTERIM LEGISLATION.

Soon after formal organisation, the Commission, in a report to the Ways and Means Committee of the House of Representatives, called attention to possible methods of protecting the Public Treasury against loss and securing what is, in effect, an increase of revenue, during the periods when Congress has under consideration legislation for raising Customs duties and internal revenue taxes. In anticipation of the impending advances in duties, and with a view to evading them, unusually large quantities of goods are imported and withdrawn from bonded warehouses, and to meet this situation, the Commission suggested that increases in duties and taxes could be enforced provisionally, as in other countries, subject to the definite enactment of the pending measures. More specifically, the Commission proposed that the date of introduction of a revenue Bill, in the House of Representatives might be fixed as that on which liability for the new or increased taxes should begin; and that from such date bonds should be given for the new or increased taxes, by importers and others liable therefor, collection to be made eventually at the rates as settled on enactment.

The examples reviewed in the Commissions' special report, from certain foreign countries, where new and increased taxes, when proposed by the Government, become almost instantly effective; the evidence available as to the loss to the United States revenue in times past during the period between the first stage of the legislative consideration of revenue laws and their final enactment; and the certainty that in the more or less distant future increases of taxation will again be necessary—all these considerations lead the Commission, in their present report, to renew its recommendation for the early enactment of a law dealing with this problem systematically, and providing in some way for the safeguarding of the revenue during interim periods.

CUSTOMS ADMINISTRATIVE LAWS.

The laws and regulations which govern the methods of collecting and controlling the Customs revenue require, by general consent, to be revised, in order to bring them into conformity with the changed needs of modern times. With the aid of Government officials and business men, the Commission has prepared a tentative draft of a proposed revision, which has been submitted to various persons interested, for criticism and advice. As a result, the Commission hopes to present to Congress in the near future a formulated code, so arranged that the existing statutes and the suggested alterations can be conveniently compared.

FREE PORTS OR FREE ZONES.

The Commission has had under consideration the question of the establishment of "free zones" in United States ports, as an alternative to the administration of bonded warehouses and the system of granting drawbacks in connection with the re-export of foreign goods. The Report states that whilst there are certain obvious advantages in the "free zone" system, a careful survey must be made before it would be safe to assume that the plan would be successful or workable in the United States. In this connection, the Commission has instituted investigations in three large importing cities, situated, respectively, on the Atlantic, the Gulf, and the Pacific.

TARIFF INFORMATION CATALOGUE.

The most important permanent function of the Commission is that of having at the command of Congress, on all phases of the tariff question, information which will facilitate careful and well-devised legislation. The Commission, accordingly, has undertaken to establish and keep up to date a catalogue of tariff information, planned to contain, for every article enumerated in the Tariff Acts, all available data concerning import and export, domestic production, cost of production, the conditions of competition between the domestic and imported products, etc. A part of the general plan will be the establishment of a tariff library, consisting of books, pamphlets, newspaper articles, and representations from producers and importers, arranged for ready consultation in connection with the catalogue.

THE CHEMICAL INDUSTRY.

The Commission observe that, among the most important of the tariff problems, both in times of war and of peace, are those which relate to the chemical industry. By the Tariff Act of 1913, a considerable revision had been made of the Chemical Schedule of the Tariff; and the shortage of dyestuffs which was experienced in 1916 led Congress, by the Act of 8th September, 1916, to undertake a further revision of the duties on important chemicals, especially

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coal-tar products. After describing the provisions of the Act of 1916 in regard to chemicals [full particulars were given in the notice at pages 124-5 of the "Board of Trade Journal" for 12th October, 1916], the Commission point out that the provision in that Act for a possible abolition of the additional specific duties now levied on coal-tar products (in the form of semi-manufactured and fully manufactured articles) at the close of the first quinquennial period will necessitate a census of the domestic production of the commodities in question. The Commission is preparing to undertake such a census, and will make a first enumeration this year.

The Commission is also undertaking an extended survey of the chemical industry, which, it is pointed out, will have to face new conditions on the conclusion of peace, owing to the revolutionary changes in the industry brought about by the war. In some branches, there will be surplus capacity, and the probability of sharp international competition. The Commission expects to present to Congress a detailed report, showing the development of the various branches of the industry, and attention may be called to the need for some changes in the Chemical Schedule of the Tariff, such as will make it clearer, more consistent, and more easily administered.

THE SUGAR INDUSTRY.

The fiscal and industrial questions which arise in connection with the sugar industry and the sugar duty may call for the early attention of Congress. This industry has been profoundly influenced by the war, and the Commission has thought it desirable to proceed with the collection of all available data as to the sources of supply, methods and cost of production, etc., for the information of Congress in dealing with the matter.

WAR DISTURBANCES.

It has been the endeavour of the Commission to secure such information as is available with regard to the industrial readjustments caused by the war, and the conditions likely to ensue at its close. It is hoped to have at the disposal of Congress information which will be serviceable when the business of the country is once more to be reorganised on a peace basis, and the new conditions of competition have to be faced.

As a part of this task, the Commission is endeavouring to ascertain also what stocks of goods now in European countries are being held for export to the United States on the conclusion of peace.

INTERNATIONAL COMMERCIAL RELATIONS.

The war, and the entry of the United States into the war, has made it certain that on the conclusion of peace, attention must be given to the revision of the commercial treaties and tariff arrangements between the United States and foreign nations.

The Report states that "neither in the past nor under existing legislation has the United States Government had an established policy with regard to its commercial treaty relations." The commercial arrangements entered into by the United States under the provisions of the various Tariff Acts since 1890 are briefly reviewed; and the systems adopted in European countries for dealing with the problem are described.

The war has brought possibilities of commercial alignments on an entirely different basis. "Both our Allies and our enemies are considering the possibilities of commercial warfare, commercial neutrality, and commercial alliance." In view of this new situation, the Commission has thought it desirable to bring together the pertinent evidence bearing on the whole subject, and is, accordingly, preparing an extended report on bargaining tariffs, commercial treaties, and economic alliances. Certain members of the Commission are to undertake an investigation in foreign countries for the purpose of collecting information on the subject which is not available in the United States.

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.]

IMPERIAL AND FOREIGN TRADE—continued.

UNITED KINGDOM.

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

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

Electro-tinning plant.**Machinery—**

Automatic machines for the serial numbering of protractors, etc.

Machinery for colouring typewriter ribbons.

Machinery for covering copper wire, for magnets, with insulating material, the wire being drawn through a liquid mixture having rubber as a basis.

Machinery for manufacturing macaroni, vermicelli, etc.

Machinery for manufacturing surgical needles.

Machinery for manufacturing tooth brushes.

Machinery for pin making (safety and ordinary).

Rotary brushes or appliances for removing the husks of almonds or nuts when being blanched.

AUSTRALIA.

GENERAL STORES FOR THE BROKEN HILL MINE.

His Majesty's Trade Commissioner in Australia has forwarded a copy of the conditions of contract and schedule of quantities and rates in connection with a call for tenders by the Broken Hill Proprietary Company, Ltd., Melbourne, for the supply of general stores required during the year ending 31st March, 1919, for use at the Mine, Broken Hill. The requirements include bolts and nuts, nails and screws, rivets, brushes, brass, copper, chemicals, bottles, crucibles, and other articles for assaying, cocks and valves, soap, electric cables, lamps and bells, etc., gas pipes and fittings, general ironmongery, tools, harness, leather, hose, iron and steel in bars and sheets, oils, lubricants, paints, rope, candles, etc.

A copy of the conditions of contract and schedules of quantities may be consulted by British manufacturers in the Enquiry Office of the Department of Overseas Trade (Development and Intelligence).

[NOTE.—The time for the receipt of tenders has expired, but the above is published so that British manufacturers may have an indication of the class of goods required in this important annual contract.]

His Majesty's Trade Commissioner has also forwarded one copy each of the schedules showing store requirements at Broken Hill and Hummock Hill, South Australia, of the above-mentioned company for the twelve months ending 31st March, 1918, with the names of the accepted tenderers. These schedules may also be consulted by British manufacturers in the Enquiry Office of the Department.

NEW ZEALAND.

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

ENGINEERS' REQUISITES.—An Auckland firm, engaged in retailing engineers' requisites in Auckland Province, proposes to extend its business and is prepared to take up agencies for United Kingdom manufacturers of the following goods:—Electric cables and wires; bar iron, steel, etc.; emery cloth, wheels, powder, etc.; rubber hose, etc.; internal combustion engines; machine and hand tools; bolts, nuts, etc.; files, drills and tool steel; engine packings; cotton waste and sponge cloths; and boiler fittings, mounts, etc.

In addition to agencies for retail business in Auckland Province, the firm wishes to obtain agencies for the whole of the Dominion, throughout which it is proposed to send travellers.

The firm will also tender for Government, Municipal, and other requirements. [Reference No. 22.] (See Notice to Manufacturers and Exporters on p. 130.)

TEXTILES, FANCY GOODS, AND TOYS.—An agent, whose head offices are in Dunedin, desires to get into touch with United Kingdom manufacturers of laces, similar to Plauen lace, art serges, grey sheetings, calicoes, etc., and fancy goods and toys, with a view to obtaining agencies for trade after the war. Up to the present time the enquirer has restricted himself almost exclusively to the soft goods business. After the war he intends to establish a fancy goods side to his business, and will open an office in Wellington. [Reference No. 22.] (See Notice to Manufacturers and Exporters on p. 130.)

IRON AND STEEL GOODS, OIL ENGINES, ETC.—An Auckland firm desires to get into communication with

IMPERIAL AND FOREIGN TRADE—continued.

United Kingdom manufacturers of iron and steel goods, general hardware, oil engines, etc., desiring representation in New Zealand. The business of the firm referred to is chiefly as brokers, that is they take up parcels either from abroad or in New Zealand, and sell on a 2½ per cent. commission basis. Quotations c.i.f., New Zealand would be required, the seller to draw on the purchaser. The firm does not travel New Zealand, but is in constant touch by letter and telegram with firms throughout the Dominion. [Reference No. 23.] (See Notice to Manufacturers and Exporters on p. 130.)

AGENTS' SERVICES IN BRAZIL.—A member of a firm established in Porto Alegre, who is now in the United Kingdom on a business visit, wishes to get into communication with United Kingdom manufacturers desirous of being represented in Porto Alegre. [Reference No. 24.] (See Notice to Manufacturers and Exporters on p. 130.)

LEATHER GOODS, CLOCKMAKERS' ACCESSORIES, ETC., IN FRANCE.—H.M. Consul-General in Paris reports that an agent in that city desires to represent United Kingdom firms for the sale of leather goods, boots, clockmakers' accessories, and other goods, in the Departments of the Nord, Pas de Calais, Seine, etc. [Reference No. 25.] (See Notice to Manufacturers and Exporters on p. 130.)

GREECE.

AGRICULTURAL MACHINERY AND IMPLEMENTS.—H.M. Consul at Canea, Crete, writes that the question of supplying agricultural machinery and implements for the use of the island is one which is likely to increase in importance in the near future. Already within the last twenty years there has been a tendency in that direction, fostered by the Department of Agriculture, and side by side with the primeval methods of agriculture generally prevalent throughout the island, machinery of up-to-date description is to be met with, more particularly at or near Canea, Candia and Rethymo.

In Candia and district motor oil engines have been imported almost exclusively from the United Kingdom. In the same district there are a few hydraulic presses and steam presses in use for kernel oil mills. These are imported from the Piræus, where they are made. The pistons and cylinders for these, however, are invariably imported from the United Kingdom, *via* the Piræus. Small accessories and parts have hitherto been almost always brought from Germany.

In Canea and district motor oil engines are in use for pumping water, and for corn mills and olive presses. The motor oil engines first imported into the district were of German make.

H.M. Consul is informed that in the early part of 1914 efforts were being made to introduce into Crete from the United States benzine ploughs, at prices ranging from about £48 to £240.

The following is a list furnished by a Cretan agricultural expert of the principal requirements of the island in agricultural machines, implements and tools:

A. AGRICULTURE PROPER.

Small ploughs ("tourne oreilles"), suitable for ploughing on hillsides, and other types of light ploughs with wheel and shafts proportionate to the small native bullocks, mules and horses; small harrows for cleaning the fields of weeds, etc.; small hand drills, and also some horse drills for seed and chemical manures; mowing and reaping machines of the simplest description; threshing machines, particularly for the plains of Messara, Candia and Canea; grain sorters, with apertures to order suitable to local requirements; presses for forage and hay, always with a handle; automatic windmills, with water pumps; and heavy motor oil engines.

B.—AGRICULTURAL INDUSTRIES.

Oil.—Hydraulic presses for extracting oil, and filters of large and small output.

Wine.—Portable wine presses (hand), and presses mounted on wheels; presses for residue of grapes; filters of large and small output for the clarification of wines; apparatus for pasteurising; and apparatus for distilling pure alcohol.

Milk.—Small centrifugal creamers of an output of about 11 gallons of milk per hour; butter churns; and cheese presses.

C.—AGRICULTURAL TOOLS.

Pruning shears, grafting knives, hatchets, scythes, sickles, spades, picks, forks (three and four prongs), and apparatus for crushing and sprinkling sulphur, sulphate of copper and other chemicals.

[NOTE.—In reading the foregoing, regard should be had to existing restrictions on exports; the information is published with a view to after war trade.]

Government Notices affecting Trade.

EXPORT SECTION.

APPROVED CONSIGNEES IN CHINA AND SIAM.

The Foreign Trade Department of the Foreign Office notifies the following additions to the list of persons to whom articles to be exported to China and Siam may be consigned:—

CHINA—ADDITIONS.

Australian Trading Co., Shanghai.
Bannister, T. D. W.
Caprino, P., Tientsin.
Compagnie Générale d'Extrême-Orient, Tientsin.
Dunlop, W. & Co., Shanghai.
Eastern Syndicate, Shanghai.
Lyons, A., & Co., Shanghai.
Marzoli, E., Tientsin.
Oriental Land Co., Ltd., Shanghai.
Robert, Lang & Co., Shanghai.
Runacher, J., Tientsin.
San Sing Cotton Manufacturing Co., Ltd., Shanghai.
Vordoni, S. J., & Co., Tientsin.

SIAM—ADDITIONS.

Straits and China Textile Co., Ltd., Union Dispensary, Bangkok.

[N.B.—The white list of approved consignees in China applies also to firms in Harbin (even though goods are entered as consigned to Harbin, Russia), but does not apply to firms in the British Colony of Hong Kong, or to firms in Wei-hai-wei, Macao, Tsingtau, Dalny (Dairen), or the Japanese Leased Territory in Kwantung.]

APPROVED CONSIGNEES IN LIBERIA.

The Foreign Trade Department also announces the addition to the list of persons and bodies of persons to whom articles to be exported to Liberia may be consigned, of all persons in Liberia who are not of enemy nationality, or whose names are not, for the time being mentioned in the Statutory List.

IMPORT SECTION.

IMPORTS OF RICE.

Following on their Order of 27th January, 1917, with reference to the control of rice, the Royal Commission on Wheat Supplies have given notice that all c.i.f. contracts for rice, other than Burma and Japan rice, are taken over by the Commission from the first seller resident in this country at the first contract price. The term "first seller" includes:—

(a) The London house of the shippers or the first contractor in the United Kingdom if purchased direct from shippers abroad.

(b) Shipper's agent if the agent's name appears in the contract as seller.

The first sellers have been instructed to furnish the Royal Commission with details of all purchases on c.i.f. terms of such rice which have not yet arrived in the United Kingdom.

GENERAL SECTION.

NEW INDUSTRIES FOR THE ENGINEERING TRADES.

The Minister of Reconstruction has appointed the following Committee of manufacturers and business men to consider the provision of new industries for the engineering trades:—

The Hon. H. D. McLaren, M.P., C.B.E. (Chairman), Mr. Charles Bennion (The British United Shoe Machinery Co.), Sir George Bullough, Bart. (Messrs. Howard and Bullough), Mr. F. H. Crittall (The Crittall Manufac-

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turing Co.), Mr. R. Dumas (The British Thomson-Houston Co.), Mr. W. B. Lang (Messrs. John Lang and Sons), Mr. C. A. Lister (Messrs. R. A. Lister and Co.), Mr. P. J. Pybus (The Phoenix Dynamo Manufacturing Co.), Mr. G. H. Sankey (Messrs. Joseph Sankey and Sons, Ltd.), Sir Percy Stothert, K.B.E. (Messrs. Stothert and Pitt), Mr. J. Taylor (Messrs. Mather and Platt), Mr. W. Taylor (Messrs. Taylor, Taylor and Hobson), Mr. W. Thom (Messrs. Yates and Thom), and Sir W. Rowan Thomson, K.B.E. (Messrs. David Rowan and Co.).

The duties of the new Committee will be to compile a list of the articles suitable for manufacture by British engineers which were either not made in the United Kingdom or were made in insufficient quantities before the war, and for which there is likely to be a demand after the war. The list is to be classified in three groups: Articles that can be made (1) by women, (2) by men and women, and (3) by skilled men, and is to show the industries to which such new manufactures could most suitably be attached.

The Committee are also to make recommendations as to the establishment and development of these new industries by the transfer of labour or machines or by other measures; also as to how such transfer could best be made, and what organisation would be needed for the purpose, with due regard to securing the co-operation of labour.

To give help on this side of the work a Labour Advisory Panel is being formed, consisting of representatives of skilled, semi-skilled and unskilled workers, and of women. With this Panel the Committee will work in co-operation on questions concerning labour.

The need for such a list of articles and for some organised effort to make them at home has been amply shown by the war, which revealed the United Kingdom's dependency on many countries, even the enemy, for articles vital to home industries, and even to British war equipment. "Rush" orders to many countries were required before necessary goods could be obtained, and but for these special efforts and for favourable circumstances which made the import of these articles possible, there would have been a shortage.

The Committee have already covered some of the preliminary ground of their enquiry, and lists of imported engineering articles have been compiled from information supplied by merchants, trade associations and others. The lists embrace hundreds of articles ranging from the biggest engineering tools down to smallest accessories.

It will be for the Committee to inquire as to which of all these articles may with advantage be made at home, having regard to all the conditions and considerations governing their manufacture.

MAXIMUM PRICES FOR IRON AND STEEL.

With reference to the General Permit of 1st November, 1916, issued by the Minister of Munitions, as subsequently modified, fixing maximum prices for (amongst other things) bar iron and steel, the Minister has given notice as follows:—

1. As from 21st January, until further notice, the said General Permit shall take effect as if under the heading "Maximum Basis Prices for Bar Iron," the following words, namely, "Marked Bars, £16 per ton net f.o.t. makers' works," were substituted for the words "Marked Bars, £15 10s. per ton less 2½ per cent. f.o.t. makers' works."

2. As from 21st January, until further notice, no Extra for tensile quality contained in any list of authorised Extras chargeable on steel material for the time being current, and issued on behalf of the Minister of Munitions for the purposes of the said General Permit, as subsequently modified, shall be charged on any sale of steel in shell discard quality in addition to the maximum basis prices set out in the said General Permit as subsequently modified.

[Note.—In cases where shell discard steel has been transferred to works other than those of the maker for rolling down into special small billet sizes in order to meet urgent requirements, Permits for selling such billets at prices other than those authorised under the said General Permit may be granted if the proposed price is approved. Application for such Permits should be made to the Controller of Iron and Steel Production, Room 382, Ministry of Munitions of War, Whitehall Place, London, S.W. 1.]

**GOVERNMENT NOTICES AFFECTING TRADE—
continued.**

**SPELTER (CONTROL) AMENDMENT
ORDER, 1918.**

The Minister of Munitions has made an Order, dated 22nd January, extending, as follows, the Order made by him as to the control of spelter, and dated 23rd March, 1917:—

As from 22nd January the said Order of 23rd March, 1917, shall operate and take effect as if the following clause was substituted for Clause 5 of the said Order, namely:—

5. For the purpose of this Order the expression "spelter" shall mean spelter of all qualities, and shall include sheet and rolled zinc, scrap zinc, hard spelter, dross, zinc ashes, flux skimmings, zinc dust, zinc ore, zinc oxide, zinc sulphide (or lithopone), whether dry, in oil, or prepared for use, and zinc compounds of every kind, or any of them."

[NOTE.—The Order of 23rd March, 1917, referred to above, was published in the "Board of Trade Journal" of 29th March.]

**TURPENTINE AND SUBSTITUTE CONTROL
ORDER.**

The Minister of Munitions has made the following Order, dated 25th January:—

1. No person shall, on or after 25th January, 1918, until further notice, purchase or take delivery of any spirits of turpentine or any turpentine substitute, as hereinafter defined, now or hereafter situated in the United Kingdom, except under and in accordance with the terms of a licence issued under the authority of the Minister of Munitions, or of the Board of Admiralty, or of the Army Council; or sell, supply, or deliver any such spirits of turpentine or turpentine substitute to any person other than the holder of such a licence, and in accordance with the terms thereof; provided that no such licence shall be required by any person for the purchase and delivery of any such spirits of turpentine or turpentine substitute in quantities not exceeding an aggregate of five gallons during any one calendar month.

2. For the purposes of this Order the expression "turpentine substitute" shall mean mineral turpentine, white spirit, white oil, or any product of petroleum under whatever name sold or known (except motor spirit and benzine), capable of being used as a substitute for spirits of turpentine.

3. This Order may be cited as the Turpentine and Substitute Turpentine Control Order, 1918.

4. All applications for licences under this Order should be made to the Controller, Mineral Oil Production Department (M.P.S.), Ministry of Munitions, 8, Northumberland Avenue, London, W.C.2.

RAW GOAT SKINS REQUISITIONED.

The Army Council have made two Orders, both dated 18th January, (1) giving notice of their intention to take possession of all raw goat skins now in stock in the United Kingdom, or imported after 18th January, and (2) ordering that no person may, without a permit issued by the Director of Raw Materials, sell or deliver any raw goat skins at prices exceeding the following:—

I.—INDIAN SKINS.

Amritsars—

Standard Assortment:—85 per cent. primes; 15 per cent. seconds.

Average weight per 500 skins:—

1,000 lb.,	40 pence per skin.
1,100 "	44 " "
1,200 "	48 " "
1,300 "	50 " "
1,400 "	52 " "

Coconadas—

Standard Assortment:—90 per cent. primes; 10 per cent. seconds.

Average weight per 100 skins:—

180-190 lb.,	48 pence per skin.
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South Madras—

Standard Assortment:—90 per cent. primes; 10 per cent. seconds.

Average weight per 100 skins:—

160-170 lb.,	44 pence per skin.
170-175 "	46 " "

North Madras—

Standard Assortment:—85 per cent. primes; 15 per cent. seconds.

Average weight per 100 skins:—

180-190 lb.,	44 pence per skin.
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**GOVERNMENT NOTICES AFFECTING TRADE—
continued.**

Wet Salted Skins—

Average prices for usual selection and quality:—

40 inches and up,	54 pence per skin.
36-40 inches	50 " "
33-36 "	42 " "
28-33 "	37 " "

II.—SOUTH AFRICAN SKINS.

Assortment:—

	Pence per lb.		
	Light.	Extra Light.	Kids.
Capes	32	35½	34
Algoa Bay	31	34	32
Kallirs	28	32½	29
Natal	30½	33	34

III.—WEST AFRICANS.

For usual assortment and average quality.

Weight per 12 skins:—

13 lb., 33 pence per lb.

15 " 31 " "

IV.—ALL OTHER CLASSES OF SKINS.

Skins of all other classes shall be sold at prices not exceeding those calculated on the basis of those above set out.

ENEMY BUSINESS TO BE WOUND UP.

The Board of Trade have made an Order (No. 502, dated 23rd January) requiring the winding-up of the business of Myer Eisen, 346-8, Bethnal Green Road, London, E. 2, Timber merchant. The Controller appointed is Mr. Peter Leask, St. Mildred Court, Bank, London, E.C. 2.

MAILS FOR TRISTAN DA CUNHA.

An opportunity for the despatch of letter and parcel mails to Tristan da Cunha will probably occur during the latter half of February. Definite particulars will be announced later, if possible, but letters and parcels should be posted early.

The rates of postage to be prepaid on correspondence for Tristan da Cunha are as follows:—Letters, 1d. per ounce; printed papers, ½d. per two ounces; and parcels, up to 3 lb., 1s.; 3 lb. to 7 lb., 2s.; and 7 lb. to 11 lb., 3s.

FOOD ORDERS.

The following, amongst other, Orders have recently been made by the Ministry of Food:—

**DISTRIBUTION OF IMPORTED BACON,
HAMS AND LARD.**

Owing to the exceptional weather conditions in the United States delays in shipping have occurred which have interfered with expected arrivals of bacon, hams and lard. The United States Government are taking measures to overcome the congestion on their railways and to expedite in every possible way the arrival in this country of these foods.

The relief afforded by these measures cannot, however, be felt immediately, and it is accordingly found necessary to postpone the introduction of the scheme for the distribution of imported bacon, hams and lard from 1st February, as originally announced, to the 1st March.

During the period which must elapse before the scheme comes into operation any imported bacon, hams and lard available for civilian consumption will be distributed as far as possible in such a way as to give preference to districts where there are miners or munition workers.

RAW COCOA RETURNS ORDER.

The Food Controller has issued an Order requiring returns of all cocoa in bond on 22nd January, 1918. The return must be made on or before the 2nd February, 1918, and must include all raw cocoa, whether held on account of persons outside the United Kingdom or otherwise. Attention is specially directed to the clause of the Order which requires all persons liable to make returns to apply for forms to the Ministry of Food (Statistical Branch, Palace Chambers, Westminster, London, S.W. 1). The Ministry does not undertake to supply forms except on application, and no one will be excused from making the return on the ground that he has not seen the Order or received a form.

Customs Regulations and Tariff Changes.

AUSTRALIA.

IMPORT REGULATIONS.

The Board of Trade have received information from the London office of the High Commissioner for Australia that a Proclamation issued on the 5th December, 1917, prohibits the importation into Australia of kerosene, petrol, benzine, and other products of petroleum in tins branded or labelled on the sides or bottom. It has, however, been decided to admit goods for which a firm order was placed with the manufacturers prior to the date of the Proclamation.

PROHIBITED IMPORTS: AMENDED CONDITIONS OF ADMISSION.

With reference to the notice which appeared on pp. 524-5 of the "Board of Trade Journal" of the 6th December, 1917, relative to Circular L.O. (13) dated 28th November, 1917, specifying the conditions under which goods prohibited from importation into Australia by the Proclamations of 10th August and 10th November, would be admitted into Australia, the Board of Trade has been notified that the High Commissioner has received information that it has now been decided to waive the condition as to committal to payment by the importer, where the condition as to a firm order being placed with manufacturers is fulfilled.

[NOTE.—In the "Board of Trade Journal" notice referred to above, it is stated that the prohibited goods could be admitted into Australia under the following conditions:—

- (i.) That a firm order was lodged with the manufacturers on or before the date of certain Proclamations;
 - (ii.) that the goods were in course of manufacture on those dates;
 - (iii.) that the importer was committed to payment.
- It will be seen from the above notice that condition (iii.) is now waived, provided condition (i.) is fulfilled.]

ADMISSION OF CERTAIN TOYS AND ADVERTISING HOARDINGS.

In connection with the particulars above referred to, given in the "Board of Trade Journal" of the 6th December, 1917, a further communication has been received from the Office of the High Commissioner for Australia, as follows:—

"With reference to Circular L.O. 13 issued by this office on the 28th November, 1917, dealing, *inter alia*, with the prohibition imposed by the Commonwealth Government on the importation of certain articles made of tin plate, or put up in tin plate containers, the High Commissioner has received advice from the Commonwealth Department of Trade and Customs that it has been decided to admit toys other than of tin plate, and advertising hoardings, signs, and plates other than of tin plate or galvanised plate."

IMPORTATION OF MOTOR CARS.

The High Commissioner is also advised, with reference to the prohibition of the importation of bodies for motor vehicles, that it has been decided to admit motor cars ordered prior to the date of the Proclamation of the 10th August, 1917, if despatched from factory on or before the 31st March next.

CEYLON.

SUSPENSION OF CERTAIN EXPORT DUTIES.

The "Ceylon Government Gazette" of the 30th November, 1917, contains copy of a Government notification to the effect that from and after the 1st December, 1917, the export duties on copra and coconut oil will be removed for a period of six months, provided that in each case the exporter can show to the satisfaction of the Principal Collector of Customs that he has not charged the seller with export duty, or, in the case of coconut oil, that the oil has been manufactured from copra, the seller of which has not been charged with the export duty.

GOLD COAST.

EXPORT PROHIBITION PROCLAMATION.

The Board of Trade have received through the Colonial Office a copy of the "Export Prohibition (War) Proclamation No. 38" (No. 45 of 1917), which prohibits

CUSTOMS REGULATIONS AND TARIFF CHANGES—continued.

the exportation from the Colony of the under-mentioned goods to the extent specified below, viz. :—

To all destinations except the United Kingdom, British Possessions and Protectorates, France, Italy, and Russia, except through Baltic ports:—

All oleaginous kernels, nuts, seeds, and products (except vegetable oils, cocoa, foodstuffs and feeding stuffs manufactured from oleaginous kernels, nuts, seeds, or products), including castor beans, coconuts, copra, cotton seed, ground nuts, earth nuts or pea nuts (*Arachides*), hempseed, linseed, palm nuts and palm kernels, poppy seeds, rape or colza seed, sesame seed, soya beans, sunflower seed, and all other oleaginous kernels, nuts, seeds, and products.

To all destinations except the United Kingdom:—
Palm oil.

To the United Kingdom and all foreign countries in Europe and on the Mediterranean and Black Seas, other than France, Italy, and Russia (except through the Baltic ports), Spain, and Portugal:—

Cocoa.

Notwithstanding the above prohibitions, it is provided in the Proclamation that such goods may be exported to such consignees in such countries and in such manner and quantity as may be permitted by the Governor.

SOUTH AFRICA.

CUSTOMS TARIFF DECISIONS.

Tariff Decisions (No. 26) dated 22nd November, 1917, which has been issued by the Commissioner of Customs of the Union of South Africa, contains a List of Decisions as to the classification of various articles under the Customs Tariff, when imported into the Union.

The following are the decisions contained in the above-mentioned list:—

Articles.	No. in Tariff.	Rate of Import Duty.	Rebate allowed upon goods the growth, produce, or manufacture of the United Kingdom and reciprocating British Colonies.
Brazing spelter (brass filings) ...	191	20 % <i>ad val.</i>	3 % <i>ad val.</i>
Bronze foil ...	117D	3 % ..	The whole duty.
"Castle Brand" hat polish ...	44C	£1 3s. 6d. per imperial proof gallon	—
Chrome alum ...	167	Free.	—
Clog irons (iron tips for boots) ...	81	3 % <i>ad val.</i>	The whole duty.
Combination lathe and fret saw machine.	193	20 % ..	3 % <i>ad val.</i>
Copal gum (a resin), if in bulk ...	126	3 % ..	The whole duty.
Copper tubing for motor cars (steam tubing) ...	121	3 % ..	The whole duty.
Crater compound (a lubricant) ...	193	20 % ..	3 % <i>ad val.</i>
Cutting compound a lubricant ...	193	20 % ..	3 % ..
Drier (used in printing ink for the purpose of facilitating drying.)	193	20 % ..	3 % ..
Dyes for manufacturing purposes: Eusticine, water nigrosine, nut brown, phosphoric substitute, Coomastic black, Levant ink.	167	Free.	—
Glass ampoules ...	83	3 % <i>ad val.</i>	The whole duty.
Granulated lead ...	193	20 % ..	3 % <i>ad val.</i>
Ground glass ...	193	20 % ..	3 % ..
"K.Y." (a lubricating jelly) ...	70	25 % ..	3 % ..
Lakatine (used in printing ink for the purpose of tinting) ...	193	20 % ..	3 % ..
Merrillite zinc dust ...	146	3 % ..	The whole duty.
Mixing white (used in printing ink for the purpose of tinting).	193	20 % ..	3 % <i>ad val.</i>
*Pinheroin ...	44D	£1 4s. 6d. per imperial gallon, or 25 % <i>ad val.</i> whichever duty shall be the greater	—
Pinions (motor car parts) ...	193	20 % <i>ad val.</i>	3 % <i>ad val.</i>
Protective seals (for use in construction of packing cases).	193	20 % ..	3 % ..
Rennet test (for testing milk and cream).	114A	3 % ..	The whole duty
Saw edge joint fasteners (for use in construction of packing cases)	193	20 % ..	3 % <i>ad val.</i>
Simplex patent vat gates ...	121	3 % ..	The whole duty.
Sodium sulphate ...	193	20 % ..	3 % <i>ad val.</i>
Steel grit (used in the cutting of granite).	114A	3 % ..	The whole duty.
Surgical tow ...	188A	Free.	—
Tanning substances: C. S. Tragaccol; *Enzo; *Sulphide of sodium; Gum tragaccol; Arsenic sulphide.	167	Free.	—
Thuban compound (a lubricant) ...	193	20 % <i>ad val.</i>	3 % <i>ad val.</i>
Valves (motor cycles) ...	193	20 % ..	3 % ..
Watch covers (celluloid) ...	193	20 % ..	3 % ..
Waterproofing powder and paste (for mixing with cement).	193	20 % ..	3 % ..
Wooden skewers ...	190	20 % ..	3 % ..

* Revised decision.

CUSTOMS REGULATIONS AND TARIFF CHANGES—continued.

NEW ZEALAND.

PROHIBITED IMPORTATION OF WHEAT, FLOUR, ETC.

The "New Zealand Gazette (Extraordinary)" of the 13th November 1917, contains copy of an Order-in-Council of the 12th November, 1917, prohibiting the importation into New Zealand of wheat, flour, bran and pollard, save with the consent of the Minister of Customs given on the recommendation of the Board of Trade.

ARGENTINA.

NEW REGULATIONS AFFECTING TRADE.

The Argentine "Boletin Oficial" for the 24th October, 1917, contains a Ministerial Resolution to the following effect:—

GOODS IN TRANSIT.

When goods in transit for foreign countries (*e.g.*, Chile) are handed over from the Custom House to the railway company for transport to the country of destination, and such transport is effected under the responsibility of the carriers, without the intervention of the owners of the goods, the bonds (for the due arrival of the goods in the country of destination) otherwise required from the interested parties under the Argentine Transit Regulations shall be dispensed with.

TARIFF DECISIONS.

Overcoats with half-lining (*medio forro*) of silk shall be assessed for duty according to the corresponding official valuation (in the Valuation Tariff) increased by 10 per cent. The valuation shall be subject to no increase if the silk lining is exclusively in the sleeves of the garments, *i.e.*, in this case, the garments shall be regarded for Tariff purposes as being without silk lining.—[Ministerial Resolution of the 20th October, 1917.]

String and twine.—As "hilos gruesos para atar resortes," under No. 1173 of the Valuation Tariff, are to be classed those strings of the type in question, having a diameter of from 3 to 5 millimetres, and of a value not exceeding 23½ centavos (gold) per kilogramme, but twines (*tipos piolas and piolines*) are not to be included under that heading whatever be their diameter. All other string and twine (except of cotton) is to be classified under No. 1171 of the valuation Tariff.—[Ministerial Resolution published on the 24th September, 1917.]

[NOTE.—Under No. 1173 of the Tariff the official valuation is 17 centavos (gold) per kilogramme; under No. 1171, the valuation is 30 centavos (gold) per kilogramme.]

Rubber caps are to be dutiable according to the declared and appraised value, at the rate of 25 per cent. on such value.—[Ministerial Resolution of the 27th September, 1917.]

[NOTE.—With the existing surtax, the total duty amounts to 32 per cent. *ad valorem*.]

Women's skirts and other articles of wearing apparel (*outer*), made of netted tissue (*punto*) of linen, silk, cotton or wool, are to be classified for duty under the relevant headings of the Valuation Tariff providing for "Vestidos," according to the textile material of which they are made and the nature of the trimmings and other accessories.

The headings in the Tariff relating to "Confecciones de tejido de punto" are meant to apply to articles of hosiery or under garments.—(Ministerial Resolution of the 12th November, 1917.)

PROHIBITION OF EXPORT OF SISAL THREAD, ETC.

The "Boletin Oficial" for the 2nd November, 1917, contains a Law (No. 10,278), Article 4 of which prohibits the exportation from Argentina, until the 30th April, 1918, of sisal thread, canvas (sack-cloth), and sacks.

IMPORTATION OF SUBSTANCES FOR TREATING CATTLE DISEASES.

The "Boletin Oficial" for the 8th October, 1917, contains a Decree which prohibits the importation into Argentina of (1) substances for use in diagnosing, preventing, and curing diseases to which cattle are subject, without the previous authorisation of the "Dirección General de Ganadería," and (2) such substances for use in treating cattle diseases, the existence of which in the Republic has not been officially ascertained. It is also prohibited to sell and use vaccines against cattle pest (*carbuncho*) unless such vaccines have been previously tested, and their efficacy verified by the "Dirección General de Ganadería," or by the National Health Department.

EXPORT DUTIES.

With reference to the notice at p. 110 of last week's issue of the "Board of Trade Journal," on the subject of the Argentine Law respecting export duties, the Board of Trade are in receipt, through the Foreign Office, of a telegram from H.M. Minister at Buenos Aires, giving particu-

CUSTOMS REGULATIONS AND TARIFF CHANGES—continued.

lars of the valuations which have been fixed for certain goods, and the resulting specific rates of export duty thereon.

In accordance with the Law, the export duty is a certain percentage on the amount by which the valuations exceed the "basic prices" of the goods. If the valuation fixed does not exceed the "basic price," it follows that no export duty is leviable so long as the valuation remains in force.

The specific rates of export duty quoted by H.M. Minister for preserved meat and wheat flour show that the percentage rates for these products are 50 per cent. less than the normal rates fixed by the Law, *viz.*, 7½ per cent. in the case of preserved meat (instead of the 15 per cent. fixed for products other than agricultural), and 6 per cent. in the case of wheat flour (instead of the 12 per cent. established for agricultural products).

[For the "basic prices" see the notice in last week's "Board of Trade Journal."]

No.	Articles.	Valuation.		Rate of Export Duty.	
		Pesos cts. (gold)	Pesos cts. (gold)	Per 1,000 kilogs.	Per 1,000 kilogs.
1	Cattle	Each	Nil	Each	Nil
2	Horses and mules...	64 22	0 89 5	Per 1,000 kilogs.	7 36 5
3	Bran and pollards	14 52	Nil		
4	Oats	30 80	0 18		
5	Chilled and frozen beef	236 00	1 50 5†		
6	Frozen mutton	135 00	1 36 5		
7	Dried cattle hides	703 50	7 81 9		
8	Salted cattle hides	489 69	16 03 5		
9	Quebracho logs	16 50	0 14 85		
10	Quebracho extract	122 50	7 12 5		
11	Preserved meat	375 00	4 53 ‡		
12	Maize	32 53	0 58 9		
13	Liascel	66 93	0 50 6		
14	Barley	2 28	Nil		
15	Wheat	15 00	1 19		
16	Frozen offal	330 00	29 70		
17	Wheat flour	110 88	2 05 ‡		
18	Tallow and melted fat	320 80	23 07		
19	Unwashed sheepskins	739 64	60 54		
20	Raw wool from Entre Rios and Corrientes	1489 48	133 33		
21	Raw wool from Buenos Aires, Santa Cruz, Tierra del Fuego...	1145 76	102 56		
22	Raw wool from Santa Fe, Cordoba, Pampa, Rio Negro, Chubut ...	916 60	82 05		
23	Raw wool from other regions ...	687 45	61 53		
24	Jerked meat	0 28	0 60 37	Per kilog.	0 01 96
25	Butter	0 84 3	0 01 96	Per kilog.	0 06 25
26	Goatskins	1 01 7	0 03		
27	Margarine and palmatine ...	0 38	0 03		

* The telegram from H.M. Minister is not quite clear, but it would seem that the valuation is 42.49 pesos, *i.e.*, less than the "basic price."

† This is the duty as given in the telegram from H.M. Minister, but it is possible that an error has occurred in transmission. The "basic price" of chilled and frozen beef was reported to be 233.30 pesos. A valuation of 236 pesos would therefore give a duty of 40.5 centavos, *i.e.*, 15 per cent. on 270 pesos, the amount by which the valuation exceeds the basic price.

‡ This represents a duty of 7½ per cent. on the amount by which the valuation (375 pesos) exceeds the "basic price" (314.60 pesos).

§ This represents a duty of 6 per cent. on the amount by which the valuation (110.83 pesos) exceeds the "basic price" (76.69 pesos).

|| "Basic price" for butter, given as 18 cents per kilog. at p. 110 of last week's issue of the "Board of Trade Journal," should be 68 cents.

BELGIAN CONGO.

EXPORT DUTIES.

The Board of Trade are in receipt, through the Foreign Office, of copy of a Decree, dated the 17th December, 1917, and published in the "Moniteur" for the 6th/12th January, which provides that, except in the case of ivory, products and wares exported from the Belgian Congo shall be subject to a duty of 3 per cent. of their value.

The Governor-General is to fix periodically, by Ordinance, the valuations which are to serve as a basis for the assessment of the tax. Goods not specified in the lists to be issued shall pay the tax on the sale price, less the expenses of transport and insurance incurred from

CUSTOMS REGULATIONS AND TARIFF CHANGES—continued.

the time the goods leave the territory until they arrive at the place of destination, and less a fixed discount of 5 per cent. of the sale price on account of costs of realisation.

The tax is leviable on the value of the wares and products, exclusive of the value of their packing.

Ivory exported from the Colony is to pay the following export duties:—

	Francs.
Fragments 100 kilogs.	100
Tusks, weighing—	
Less than six kilogs.	160
Six kilogs. or more	210

The present Decree is to take effect on the 1st March, 1918, and from that date the export duties established by previous legislation are repealed.

ECUADOR.

MEASURES TO CONSERVE THE FOOD SUPPLY.

The "Registro Oficial" of Ecuador for the 7th November, 1917, contains a Decree of Congress, dated the 30th October, which provides that the Government shall purchase direct from producers of articles of general consumption (such as wheat, maize, potatoes, beans, barley, sugar, butter, fats, rice, flour, lentils, and other cereals and pulses) the quantities of such articles which are required for consumption in each Province, and shall sell them to the public at cost price, with an addition of 5 per cent. destined to cover costs of administration, transport, etc.

The Government is authorised to prohibit the exportation of the above-mentioned articles, whenever such a measure is deemed opportune.

The goods in question are to be subject to an export duty of from 5 to 40 per cent. *ad valorem*.

FRENCH COLONIES.

EXPORT PROHIBITIONS.

The French "Journal Officiel" for 16th January contains four Ministerial Decrees, dated the 14th January, which abrogate the provisions of various earlier Decrees in virtue of which walnuts (*noix*), hair and horsehair, phosphate of lime, and dried or drained fruits were allowed to be exported or re-exported from French Colonies and Protectorates (other than Tunis and Morocco), without special authorisation, when consigned to the United Kingdom, the British Dominions, Colonies and Protectorates, and certain other countries.

A further Ministerial Decree of the same date provides that trees, shrubs and other nursery products (which were prohibited to be exported or re-exported from French Colonies and Protectorates [other than Tunis and Morocco], to all destinations other than France and French Colonies and Protectorates by the Decree of 14th December, 1917), may, by way of exception, be exported or re-exported from such Colonies or Protectorates, without special authorisation, when consigned to the United Kingdom, the British Dominions, Colonies and Protectorates, and certain other countries.

A French Presidential Decree, dated 28th December last, and published in the "Journal Officiel" for the 2nd and 3rd January 1918, prohibits the export and re-export from French Colonies and Protectorates (other than Tunis or Morocco) of human hair, raw or worked, and transmission belts of all kinds, to all countries, other than France and the French Colonies and Protectorates.

NICARAGUA.

INCREASE OF CONSULAR FEES.

The Board of Trade are in receipt of information to the effect that, by a Nicaraguan Decree which took effect on the 18th November last, the Tariff of fees chargeable by Nicaraguan Consular officers was increased in each case by 50 per cent., except as regards the fee chargeable for the Consular visa on invoices, which is fixed as follows:—

The value of the goods:	Cordobas.
Not exceeding 100 cordobas	2-50
Exceeding 100 but not exceeding 200 cordobas	3-00
Exceeding 200 but not exceeding 500 cordobas	5-00
Exceeding 500 cordobas, 0 cordoba for each 100 cordobas or fraction thereof in excess of 500 cordobas.	

It is provided that, for the purpose of paying Consular fees, the Nicaraguan peso, or cordoba, which is equivalent

to the United States dollar, in accordance with the currency reform Law of 1912, is to have exactly the same value as the United States dollar in relation to the currency of the country in which the fees are paid.

Shipping Intelligence.

DENMARK.

PROPOSED DEVELOPMENT OF COPENHAGEN HARBOUR FACILITIES.

(From H.M. Minister.)

COPENHAGEN.

Plans have recently been drawn up for an extensive development of the Copenhagen Harbour facilities. The scheme is of interest in view of the possible importance of Copenhagen as a centre for transit trade, but on account of the length of time necessary for the satisfactory completion of the work the present plans have been prepared on the instigation of the harbour authorities purely to form a basis for discussion.

As at present outlined the scheme involves an extensive development of the harbour facilities in three directions, viz:—

EXTENSION TOWARDS THE NORTH.

Any further extension of the harbour facilities which is to meet the increasing claims on the part of the overseas trade must necessarily take place towards the north, where deep water lies close at hand and where easy connection is available with the railway. The plans, therefore, make provision for four spacious docks of a breadth of about 140 metres, and of lengths varying from 500 to 800 metres. The docks themselves will be protected by a breakwater and will be navigable both from north and south. This extension, which will give the present harbour an additional length of quay of 6.7 kilometres and an increased area of about 68 hectares, will give facilities for such undertakings as the importation of raw materials or the exportation of manufactured goods. The total cost of this part of the scheme is estimated at 28½ million kroner.

EXTENSION TOWARDS THE EAST.

An extension eastwards of the existing harbour accommodation has been projected on several occasions, but without results. The present scheme, however, provides for an extension which will allow of an increased length of quay of 9 kilometres and increase the quay space by 196 hectares. Lying in the neighbourhood of deep water and in easy connection with the railway, the new docks will be used for overseas trade, while a wide expanse of land will be available, suitable for the handling and storing of petroleum and other inflammable commodities. The cost of this part of the undertaking is estimated at about 45 million kroner, but no real estimate of the total cost can be given, as much of the land destined for use is privately owned, and also in view of the fact that some of the existing breakwaters, etc., will have to be destroyed or carried further out from the shore.

EXTENSION TOWARDS THE SOUTH.

While, in the case of extension towards the north and east special regard has been paid to the claims of overseas traffic and to the securing of storage space in the vicinity of the quays, other ideas inspire the project of extension towards the south. On the extensive tract of water beside the island of Amager it is intended to construct an "industrial" harbour, around which extensive building ground can be procured for factories, etc., and where canals can be cut and small wharves erected for the use of such factories as must draw their raw materials from ocean-going vessels.

This projected scheme, if carried out in its entirety, will increase the length of quays available at Copenhagen Harbour by 9.8 kilometres, and will bring a further 225 hectares of ground into use for the building of storage accommodation, factories, etc. The cost of this extension, as at present outlined, will amount to about 32 million kroner, but again no satisfactory estimate can be made of the total cost, as part of the ground is already occupied for various civil and military purposes, and the present owners will have to be bought out.

MALTA.

PRIZE COURT PROCEEDINGS.

Proceedings have been instituted in the Prize Court in Malta in respect of several parcels of goods on the vessels "Cattaro" and "Roumanie."

SHIPPING INTELLIGENCE—continued.

STRAITS SETTLEMENTS.

STORAGE OF GOODS AT SINGAPORE HARBOUR.

The "Straits Settlements Government Gazette" of 30th November publishes a notice to the effect that the Governor in Council has approved, under Section 47 (1) of the Straits Settlements Ports Ordinance, 1912, the levying of rates for the storage of goods (excluding coal) by the Singapore Harbour Board. These rates, which took effect on 1st January, 1918, are set forth in the "Gazette," a copy of which may be consulted by British firms in the Enquiry Office of the Department of Overseas Trade (Development and Intelligence).

SIERRA LEONE.

PROCEEDINGS IN PRIZE COURT.

The Colonial Office announce that proceedings have been instituted in the Prize Court of Sierra Leone in respect of certain goods ex the "Kronprinzessin Victoria" and the "Prinzessin Ingeborg. Appearance should be entered as soon as possible by all persons claiming an interest.

FRANCE.

STATE CONTROL OF SHIPPING.—See Notice in Imperial and Foreign Trade Section.

JAPAN.

FREIGHT RATES TO SOUTH AMERICA.—H.M. Commercial Attaché at Yokohama has forwarded a copy of recently revised outward freight rates on the South American Line of the Toyo Kisen Kaisha, sailing from Moji, Kobe and Yokohama.

British firms interested may consult the copy referred to in the Enquiry Office at the Department of Overseas Trade (Development and Intelligence).

Minerals and Metals.

NEW ZEALAND.

MINERALS OF THE DOMINION.

(From H.M. Trade Commissioner.)

WELLINGTON.

The Seventh Annual Report of the Geological Survey Branch of the Mines Department of the Dominion Government contains much of interest on the mineral wealth of New Zealand. The period covered by this Report is the twelve months ended 31st May, 1917.

LIMESTONE-DEPOSITS: FORTHCOMING REPORT.

Early in 1916 it was decided that a detailed report on the limestone-deposits of New Zealand should be prepared by the Geological Survey. The report is to contain, in the first place, general information concerning limestone, its chemical composition and uses in agriculture. Descriptions of all limestone-deposits examined by members of the Geological Survey staff or mentioned in New Zealand geological literature are to follow. The report will include all analyses of any value, and all available data concerning quality, quantity, and accessibility. It is proposed also to add a chapter on phosphate deposits, and another on limestone-crushing machinery.

During the twelve months under review numerous localities were visited and data for a lengthy report on New Zealand limestone have been obtained.

COALFIELD SURVEYS.

No more important work than the systematic examination of New Zealand coalfields could be undertaken by the Geological Survey. During previous years complete surveys of the Greymouth, Westport and Reefton coalfields have been made, but important coalfields in many parts of New Zealand still remain to be examined in detail. In 1916 reconnaissance surveys were made in the Te Kuiti and North Taranaki districts, and in the Wairio-Ohai section of the Nightcaps-Mount Linton coalfield, in order to ascertain the prospects of coal being successfully mined

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in those areas. With regard to the Te Kuiti district it may be observed that the geological evidence of a workable coalfield being present is scanty and disappointing.

NIGHTCAPS-MOUNT LINTON COALFIELD.

The coal-measures of the Nightcaps-Mount Linton district were deposited over a large area, and in patches in this area several coal-seams were formed, lenticular in shape, overlapping, thickening, thinning, and dying out in different directions. At a later geological period the whole area was disturbed by faulting, the sedimentary beds were broken into separate pieces and tilted at low angles in different directions, thus turning up the broken ends of the coal-seams to the surface and affording numerous coal-outcrops. But the abundance of outcrops, far from indicating that the whole area is underlain by continuous seams, actually shows that the original coal patches have been broken into several smaller areas, so that now the seams are continuous for only short distances. One of the coal patches has been mined at Nightcaps for thirty-six years, and from seams aggregating 36 ft. in thickness 1,181,011 tons of coal have been won; another patch, where the coal varied from 9 ft. to 22 ft. in thickness, has been worked for eleven years at Wairio, New Brighton, and 95,000 tons taken out. Other patches are now being opened, but in all cases the work is being done at or near the outcrop or opening; no systematic prospecting has been done, and, apart from what can be seen in the quarries opened, the thickness of coal and the extent of the patches are unknown. At a patch now being opened the coal is at least 20 ft. thick; at the Wairaki patch the seams are 9 ft. and 7 ft. thick; at the Mossbank patch the coal is 40 ft. thick; at the Linton patch the lower seams are 9 ft. and 9 ft. thick; another is in two splits 10 ft. and 23 ft. thick, with a 2 ft. parting of mudstone, and two more seams 6 ft. and 8 ft. thick are known; at the Mount Linton patch the coal is at least 20 ft. thick. Between these known coal-patches the country has in many places been shown to be coal-bearing, and in no place has it been proved barren. Outside the area containing the coal-patches now being opened many other outcrops of coal are known, but owing to the lack of means of communication no work has been undertaken at these outlying outcrops.

MARBLE.

The Pikikiruna Range is in great part formed of massive layers of marble. In general this rock is medium to coarse grained in texture, and in colour varies from white to black. The Kairuru Quarry, from which the marble used in the Parliamentary Buildings is obtained, is about ten miles by road from Motueka. Close at hand is the Ngarua Quarry where many large blocks occur on the surface as the result of weathering, and it is highly probable that the marble beneath is massive and will yield large-dimension blocks. Along the Takaka Valley are many outcrops of marble.

PETROLEUM.

After referring to petroleum boring operations at Blenheim and at Huiroa, fifteen miles north-east of Stratford, the Report states that at Kotuku, in North Westland, a prospecting-bore was drilled during the year somewhat to the west of previous bores. The indications of petroleum obtained were somewhat favourable. It is pointed out that the Kotuku district is by no means unpromising as an oilfield, and deserves further prospecting. Here are the largest oil-seepages in New Zealand, while bores have shown the presence of abundant salt water and carbon dioxide.

POTASH.

If potash is to be produced in New Zealand, it must be obtained from the suint of greasy wool, from wood-ashes, burnt sea-weed, insoluble potash minerals, or potash-bearing rocks.

Alunite, a hydrous sulphate of aluminium and potassium containing when pure 11.4 per cent. of potash, has been found at Ohinemutu, near Rotorua, and its occurrence in workable quantity in the Hot Lakes district is not unlikely.

New Zealand is not rich in rocks with a high potash-content. Pegmatite dykes, with 10 per cent. of potassium oxide, occur on the west coast of the South Island, and according to one authority considerable amounts of potash feldspar may be collected on the beach at Port Adventure, Stewart Island.

The volcanic rocks highest in potash-content occur near Dunedin, but none of these appear to contain over 7 per cent. of potassium oxide, so that the prospects of producing that substance from them are not very bright.

Glauconite greensands occur in many parts of New Zealand—for example, at Buruside, near Dunedin; at Seacliff, north of Dunedin; near Palmerstone South; in the Oamaru district; in South Canterbury; at Weka Pass and other localities in North Canterbury; and in the Gisborne-East Cape district, at Raukawa, Whangara Island, Takapau, etc. Although the extraction of potash

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from greensands is not likely ever to be a commercial success, yet, owing to their potash, lime and phosphate content, and owing to their friability, they are valuable as a soil-dressing, and could well be so used in those parts of New Zealand where they occur in abundance.

CLAY.

There can be no doubt that clay industries in New Zealand will become more and more important. At present only common bricks, drainpipes, tiles, and some classes of fireclay goods are manufactured in the Dominion, but a recent investigation of various sources of information shows that clays capable of yielding, by grading and mixing, material suitable for the manufacture of all classes of pottery, including porcelain, and of many other articles, are to be found in New Zealand. Of the other materials needed for pottery-manufacture flint occurs in some abundance, and feldspar is also obtainable. Silica in the form of sand and sandstone is abundant. Most of the minor substances used in clay industries are also found in New Zealand.

TALC.

In New Zealand small quantities of high-grade talc are found in various localities from Collingwood to Western Otago. The ordinary grade, commercial, "soapstone," occurs in the Collingwood district; on the north side of the Taramakau River, near Jackson's; at Taipo Gorge; on the Griffin range; in the Kokatahi River valley; on Mount Jumbletop; in the Upper Hokitika River valley; on Mount Bowen, and elsewhere in North Westland; near Jackson's Bay; near Martin's Bay; at the head of the Springburn Stream, and in other western Otago localities.

FLUOR-SPAR.

In April, 1916, a deposit of fluor-spar was located in the Barton River district. The outcrops occur on the north of what is locally known as Thomson's Hill, about half-way between the Wangapeka and Barton Rivers, and could be reached by half an hour's climb up a steep hillside from the main road. Wherever examined the fluor-spar was found to be largely mixed with barite and quartz.

MOLYBDENITE.

Molybdenite during the year under review was found in a mine at Waihi. A local assay of a selected sample gave 8.7 per cent. of MoS₂, but a bulk sample forwarded to the Mines Department did not appear to contain as much as 1 per cent. The mineral molybdenite occurs also at Tararu Creek, Thames; at Neavesville; at Richmond Hill, Parara; at Mount Radiant; at several places in the southern part of the Paparoa Range; at Dusky Sound; and at Bravo Island, near Stewart Island. Traces also occur in some specimens of Otago scheelite ores. It seems very probable that the sulphide of all the Waihi mines contains a little molybdenite.

ANTIMONY.

Antimony-ore occurs in a number of New Zealand localities, though none has been mined for a number of years. Chief of these are the Bay of Islands district, Endeavour Inlet (Marlborough), Reefton, Langdon Creek (near Brunner), Hindon (Otago), and Alexandra (Otago).

MERCURY.

A company at Whangarei is endeavouring to develop promising cinnabar-deposits in the Puhupuhi district, North Auckland. The Report states that experimental work is being continued with a view to finding a commercial process by which both the mercury can be precipitated and the sulphide solution regenerated.

Besides the Puhupuhi deposits there are several cinnabar occurrences in New Zealand that, with mercury and its compounds at their present high prices, deserve attention. Among these may be mentioned the deposits of Rahu Saddle (near Karangahake), of Mangakirikiri Stream (a branch of the Kauaeranga River, Thames district), and of Ohaewai (Whangaroa district). Attempts to work the two last-named deposits have been made, but, owing to the poor return of mercury, they were unsuccessful.

[Note—The Whangarei company referred to above sold 1,500 lb. of mercury to Australia last month at 5s. per lb.]

MANGANESE.

Manganese minerals are found in almost every part of New Zealand, the more notable occurrences being at Tikiora, near the Bay of Islands; at Waiheke Island, in the Hauraki Gulf; at Paraparaumu, about 30 miles north of Wellington; and at Taieri Beach, Otago.

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CHINA (Manchuria.)

REPORT ON THE ANSHAN IRONWORKS.

(From H.M. Consul.)

DAIREN.

The following report on the South Manchuria Railway Company's new iron works at Anshan will be of interest to British firms. The report is based on official Japanese sources of information. Such machinery as will be required to be imported from abroad for the works will probably be obtained from the United States. The remainder will be manufactured locally, at the railway works at Shakako, outside Dairen.

SITUATION OF WORKS.

The Anshan Ironworks, the property of the South Manchuria Railway Company, are situated between Anshanchan and Lichan, on the South Manchuria Railway, and are distant about 2½ miles from the latter station. The choice of this particular locality for the site of the works was due to the advantages it offered by reason of its proximity to the River Tatsuho, its convenient position for the supply of materials, its nearness to the ore producing districts, and the comparative hardness of the ground surface, which makes the work of laying rails easier, and thus facilitates the transport of the ore to the smelting works. The area of the works is approximately 3,166 acres, of which 1,828 acres are devoted to buildings.

ESTIMATED OUTPUT.

It is estimated that the annual production of these works will in future be 1,000,000 tons of pig iron and 800,000 tons of finished products. For the time being, however, only two furnaces of 200 tons will be installed, and with them about 150,000 tons of pig iron should be produced annually. This material, supplemented by scrap iron, scrap steel, and pig iron could be devoted to the making of about 150,000 tons of finished material per annum. There would be, in addition, by-products, such as sulphate of ammonia, tar, benzol, etc.

WORKS TO BE CONSTRUCTED.

Owing to the extraordinary rise in the price of iron materials, and to the difficulty experienced in obtaining machinery and other supplies, progress has been greatly hampered. Arrangements for the supply of the material for the furnaces and other machinery were, however, completed some time ago, and the plant should be ready for use by August, 1918. Whether, in view of the difficulties mentioned above, it will be possible to start the construction work for the steel foundry is at present uncertain.

The following works are contemplated for the first period of construction:—Smelting furnaces (540 cubic metres), 2; furnace hoists, 2; hurdle washers, 2; theisen washer plant, 1; furnace hoists, 2; dust catchers, 4; gas dryers, 2; hot stoves (24 feet by 200 ft.), 8; casting beds (36,000 square feet), 2; slag wool heaps, 2; coke ovens (8 tons), 160; sulphate of ammonia works, 1; slag brick plant, 1; generating plant (electric, 3,000 kilowatts, generators covering 10,000 square feet), 1; boiler room, 1; coal storing shed, 1; office for the coke oven plant, 1; general office, 1; slag granulating arrangements, 2; ventilating plant room, 1; coal washing shed (covering 8,400 square feet, capacity 50 tons per hour), 1; tar distilling plant, 1; freezing hoists, 3; arrangements for transporting raw material for blast furnace plant, 2; slag cement works, 1; office for the blast furnaces, 1; and steel foundry (uncertain), 1.

The smelting furnaces, of the latest pattern, have a total capacity of 540 cubic metres, and it is estimated that although the ore from the Anshan mine is, comparatively speaking, poor in quality, the two furnaces should be able to turn out 150,000 tons of pig iron annually. When preparations are completed, and the works are in full swing, the average annual output of each furnace should be 100,000 tons. It is apparently the intention to erect ten of these furnaces.

SUPPLIES OF ORE.

The ore used in the steel works will be supplied by a joint Chinese-Japanese company, which has been granted the mining rights in the Anshan district. The ore will come from the following localities: Tungshi-Anshan, Tielshishan, Tuimienshan, Hsiaolingsu, Takushan, Lingmenshan, Yingtaoyuan, and Wangchiahotsu. The ore is magnetite, containing from 30 to 40 per cent. of iron. This is very poor compared with the products of the Pehsilu, Tayeh and Corean mines, in which the percentage of iron is from 50 to 60 per cent. Nor is this all. In the smelting of the ordinary ore the proportion of limestone necessary is half that of the ore itself; but at Anshan

MINERALS AND METALS—continued.

the same quantity of both is required. On the other hand, the whole of the district is exceedingly rich in ore; in fact, at the top of the Tunghsi-Anshan and Takushan hills it is actually exposed, and the whole mountain in each case may be said to consist of ore. Consequently tunnels will not be necessary, and the ore will be quarried like ordinary stone. The following is the smelting result of a ton of Anshan ore:—

Limestone, 1 ton	} = Pig-iron 0.4 tons (slag residue 0.6 tons.)
Coke, 1 ton	
Ore, 1.4 ton	

WATER SUPPLY.

Wells have been sunk in the watershed of the Chien-shanho, with the object of making that the source of the water supply for the works; but the results of the borings have been disappointing, a very small and entirely inadequate head of water being obtained. During the rainy summer months it might be possible to manage, but even this would be a matter of difficulty. Accordingly water from the Tatsuho is to be brought from Liaoyang, a distance of 13 miles. The work of pipe-laying is to be taken in hand at once.

JAPAN (Corea).**DEVELOPMENT IN MINING AND IRON AND STEEL INDUSTRIES.**

With reference to the notice on pp. 521-3 of the "Board of Trade Journal" of 6th December relative to industrial and commercial prospects in north-west Corea, H.M. Consul-General at Seoul writes that the Government-General of Corea has granted permission for the establishment at Kenji-ho of a branch office of one of the Mitsubishi concerns, with a capital of 30,000,000 yen, for the purpose of manufacturing iron and steel, and of engaging in mining, forestry and transportation. Kenji-ho lies near the mouth of the River Dadio-ko, about 9 miles by branch line from Ko-shu, a station one hour south of Heijo, on the main line to Seoul.

MEXICO.**TAX ON PETROLEUM AND PRODUCTS FOR EXPORT.**

By a Decree dated 13th April, 1917, which came into operation on 1st May, a special stamp tax of varying amounts was levied on petroleum and its products for export from Mexico.

H.M. Chargé des Archives at Mexico City has now forwarded a translation of a Decree, dated 16th October, the preamble to which states that in order to protect the national industry of the refining of petroleum, it is necessary to establish different rates of taxation for the crude and refined products, calculating such rates in proportion to the total of those payable by their various components, as also to assign a lower value to gasoline, according to density, so that kerosene is treated in the same manner.

The Decree provides, *inter alia*, that for the tax on native crude petroleum the Ministry of Finance shall fix, every two months, the value of crude petroleum in such manner that the tax of 10 per cent. which must be paid under the Decree of 13th April, shall equal the total of the taxes leviable on its component parts of fuel petroleum, and unrefined kerosene and gasoline. The Ministry of Finance are also to fix, every two months, the prices of refined kerosene and gasoline, taking the average of the values current in New York during the preceding month, it being understood that these same prices shall apply to unrefined gasoline and kerosene, but deducting three-quarters of a centavo from the price of each unit, in so far as relates to unrefined gasoline.

A Circular was issued on 16th October by the Ministry of Finance in which the following prices were fixed for the two months of September and October, 1917:—

Petroleum for fuel, of density 0.91, 10 dols. per ton; petroleum, crude, of density 0.91, 13 dols. per ton; petroleum of density greater than 0.97, 5.50 dols. per ton; gas oil, 10 dols. per ton; gasoline, refined, in bulk or in packages, 0.12 dols. per litre; gasoline, crude, in bulk or in packages, 0.11½ dols. per litre; and kerosene, crude or refined, in bulk or in packages, 0.03 dols. per litre.

The prices of crude and fuel petroleum increase or diminish according to the density, in accordance with the provisions of the Decree of 13th April, 1917.

Mexican dollar (gold)=2s. 0½d. (at par exchange).

The Central European Powers.**GERMANY.****COMPULSORY CONCENTRATION OF INDUSTRIES.**

The "Norddeutsche Allgemeine Zeitung" quotes from the latest "Memorandum on Economic Measures" placed before the Reichstag particulars concerning the policy of compulsorily closing down factories in Germany. The Memorandum declares that immediately after the outbreak of war the exclusion of Germany from the world's markets made itself felt more or less acutely in a large number of industries. The shortage of raw materials placed limits on the utilisation of the available powers of production, and as it became essential to secure for army purposes all the indispensable raw materials, a series of official measures had to be taken, ranging from loose control to embargo with fixed prices. But an attempt was made throughout, by means of rationing such work as was necessary, to enable the factories in every branch of industry to continue their activities.

The extended duration of the war, however, put an end to this policy. The shortage of raw materials in many industries became so serious that it was found absolutely impossible to make a useful distribution of the available supplies among the large number of factories competent to deal with them. The growing difficulties of transport stood in the way of the despatch of small parcels to a large number of separate enterprises. On top of all this came the difficulty of obtaining labour and coal. The only alternative was to concentrate production in a few works and to close down the remainder. To carry through this policy was not easy. In the first stages the rule was adopted of placing army orders with, and furnishing raw materials to, a certain number of factories whose output was the greatest. In a few cases the authority charged with allocating orders or distributing raw materials, after hearing expert evidence from the particular industry, decided which factories should be allowed to go on working and which should be closed down. But this method, satisfactory though it may have been in a limited way, could not, in view of the changing conditions of war economics, be adopted as a general rule. Quick decisions were often necessary to meet new demands, and the authorities were not always able to consult representatives of industry, with the result that they frequently created the impression of bureaucratic interference.

A more suitable way of meeting all contingencies was the creation of industrial associations, which could themselves determine what factories should be allowed to continue working and what should be closed down. Such associations were also convenient for the authorities which had the placing of orders, inasmuch as these authorities were thereby freed from the necessity of communicating with a number of separate works. Centralised associations were furthermore instrumental in economising railway transport. For the individual works themselves the existence of an association is an advantage in that their financial interests, if they should happen to be closed down, are safeguarded. A fixed scale of compensation for closed-down works has been found impracticable. Sometimes a factory which is closed may be able to adapt itself to a branch of war work; sometimes it may be in a position to let its building. Such possibilities must, of course, be taken into account in determining the compensation payable to concerns closed down. But even so, no compensation can quite make good all the disadvantages which naturally ensue. The fact that the enterprise is at a standstill is not the principal matter. Much more serious is the fact that closed-down factories are stripped bare of their driving belts, machinery, etc., which are transferred elsewhere. It is impossible, in the present economic situation, to allow plant to be idle in one place while there is a great demand for it in another. Nor can the plant be replaced, seeing that it is impossible to obtain raw material, labour, etc., for the purpose. In these circumstances a factory which has been closed down cannot count on being able to resume work immediately on the restoration of peace. It may thus run the risk of being ousted by works which have been allowed to continue working. An isolated concern is helpless in face of these facts; an association of concerns may be able to adjust the difficulties. For this reason the authorities proceeded, in cases where it was obvious that voluntary associations would not be formed, to set up compulsory syndicates.

While the amalgamation of works has its advantages, the policy cannot be carried out generally. Each case must be treated on its merits. Moreover, where syndication has been resorted to, it will be retained only so long as it is able to serve the interests both of the particular industry and of the community as a whole.

THE CENTRAL EUROPEAN POWERS—continued.

GERMANY: OFFICIAL REPORT ON GOLD AND CURRENCY QUESTIONS.

The "Frankfurter Zeitung" publishes a brief abstract of the section on currency questions in the Eleventh Supplementary Memorandum on Economic Measures, just laid before the Reichstag. The following points are noted from this abstract:—

1. Of the total increase since the outbreak of war in the quantity of bank-notes in circulation (7,491 million marks' worth up till 31st October, 1917,) about half were circulating in the occupied territories and foreign countries.

2. As the industries working up gold adapted themselves more and more to war work, and as the employés of works which had to be closed down found occupation elsewhere, the Imperial Bank stopped the delivery of gold for the manufacture of gold articles for the civilian population, including even wedding rings. The supply of gold for dental purposes (except the treatment of wounded soldiers) was cut down by 25 per cent.

3. From the beginning of the war until November, 1916, emergency token money was issued from 357 private and public centres, to the value of 8,500,000 marks.—(*Frankfurter Zeitung*).

CONDITIONS IN THE RHENISH-WESTPHALIAN CEMENT INDUSTRY.

It is reported from the Rhine district that during the last few weeks of 1917 cement sales have declined. The shortage of coal exercised a serious effect upon production, and the shortage of railway trucks made impossible the adequate distribution of what was produced. But there has also been a falling off in demand recently. The munition works, which hitherto needed considerable quantities of cement for their new buildings, have now cut down their requirements; and exports, especially to the Netherlands, have also declined. Another factor is the competition of Belgian cement works, of which ten are in operation again.

These various adverse factors are expected to continue. Partial compensation for the loss of direct and indirect army orders has been provided by the demands of the Rhenish-Westphalian mines, and by demands for railway construction. Dealers also, who are at present without any stocks in hand, have recently come forward. The official rationing of cement during the war has tended to push them into the background; but they are naturally greatly concerned to recover their old position in the industry, and call for the abolition of war-time economic measures. In this they are seconded by the cement works themselves, which declare that an official policy of economy and restraint is unnecessary, and even harmful, so soon as abundant supplies are available. The works point out that though their productive capacity is great, in 1917 it was utilised only to the extent of 15 per cent. of its total, as against 30 per cent. in the last year of peace. They state furthermore that unless the cement industry is allowed to prepare, in good time, for the satisfaction of the *post-bellum* demand, the building trade will be held in check artificially.

Although the costs of production have increased considerably, the prices of the last quarter of 1917 are to be retained, since it is felt desirable to let the market attain a certain equilibrium. The cement manufacturers realise that prices must be reduced as soon as possible in order to give an impetus to private consumption.—(*Norddeutsche Allgemeine Zeitung*).

NEW YEAR PROSPECTS OF THE IRON INDUSTRY.

The new year has opened propitiously for the German iron industry. Work is plentiful, and new orders keep pouring in, so that in some branches the shops have sufficient to occupy them for the next seven or eight months. The demand for goods which serve as substitutes for other metals is especially heavy, and the stream of orders for such goods is so voluminous that no more can be accepted in view of the difficulty of obtaining raw materials. Owing to the insufficiency of railway trucks, there is a shortage of coal, and this brings about dislocation in the shops, with consequent delays in executing orders.

Higher prices will not, as a rule, be charged for the first quarter of 1918; the only exception being the price of Siegerland ironstone. But in making new contracts the works insist on a clause which fixes the current price at the time of delivery as the price of the transaction. They thus cover themselves in case prices should be raised later. This has now become customary throughout the whole of the iron market, and the authorities have hitherto silently acquiesced. In effect, therefore, the so-called maximum prices have only a limited importance.

Attempts to enforce syndication officially have not been continued. The Bar Iron Syndicate was indeed formed, but it has failed of its purpose. The truth is that the solution of the syndication problems in the iron industry, including the fate of the Steelworks Union (whose existence has been temporarily prolonged to the end of 1918), must be left until the return of normal conditions. All present efforts in this direction are purely provisional.

Foreign sales are developing satisfactorily, so far as there is anything left for export after the intense home demand has been met.—(*Norddeutsche Allgemeine Zeitung*).

THE CENTRAL EUROPEAN POWERS—continued.

THE PHOTOGRAPHIC INDUSTRY IN 1917.

In the first two years of the war, the "Norddeutsche Allgemeine Zeitung" is informed from Dresden, it appeared that the manufacture of cameras, which is regarded more or less as a luxury industry, would have difficult times if the war lasted long. The Dresden firms, which set the tone for the industry as a whole, were exceedingly cautious in regard to the allocation of their profits; they even expected to have to close down altogether. But the adaptability of the camera industry to the war conditions soon dispelled these anxieties; the army authorities utilised photography more and more, and made such demands on the industry that the labour still left was unable to cope with them. For the purpose of carrying out particularly delicate operations it became necessary, therefore, to grant leave from the army to skilled workers. Output for private requirements was therefore more and more restricted, with the result that there is a shortage of cameras on the market. Despite a considerable increase in price the demand is keen, especially from the front.

Altogether the industry may be satisfied with the results of the year 1917. Despite unprecedentedly high wages and prices for raw materials, the two Dresden camera works will be in a position to offer their shareholders satisfactory returns. The photographic paper and plate factories will also do quite well, notwithstanding the fact that they have had to contend with an even more serious shortage of materials than the camera factories. Since the middle of 1917 it has been possible to execute trade orders only slowly and in small quantities. Yet there is no marked scarcity of commodities on the market, as the dealers laid in abundant stocks in good time. The anxiety of professional photographers lest they should be adversely affected by amateurs proved groundless, and the proposal to restrict amateur photography found no favour.

THE DEVELOPMENT OF VEGETABLE-DRYING FACTORIES.

According to the "Norddeutsche Allgemeine Zeitung," the Eleventh Supplementary Memorandum on War Economic Measures recently laid before the Reichstag gives some particulars of the development and activity of drying factories during the war. The statistics of potato drying are now completed for the years from 1913-14 to 1915-16. The actual quantity of raw potatoes dried rose from 11.5 to 17.5 million cwt. The total capacity of the potato-drying factories now existing in Germany amounts to 37 million cwt. The capacity of these factories, therefore, has not been sufficiently utilised. A large number of simple kilns for fodder-drying, as also communal, industrial, and agricultural vegetable-drying factories, have been established during the war. According to the latest census there are now in Germany about 700 potato-drying factories (not including drying cylinder†), 250 drying cylinders, 400 open drying plants, 150 corn-drying plants, 250 vegetable-drying factories, 225 drying plants in sugar factories, and 22 milk-drying plants. About 200 of the 1,500 malt kilns are also equipped for vegetable-drying. The enquiry about the extent of the drying of agricultural products has been practically completed down to the end of the year 1916-17, and the survey of drying establishments thus provided has been useful in many cases already. There were about 400 suitable concerns for the drying of cabbage turnips in the year 1916-17. The Central Office for Drying put its plant at the disposal of the authorities for the drying of cabbage turnips, and placed numerous drying contracts with suitable factories. Abundant recourse has been had by the war economic authorities interested in drying to the data about suitable factories which have been collected by the Central Office.

An agency system has also been established by which drying contracts are placed on behalf of landowners who do not themselves possess plant. The Central Office now makes a periodical survey of the extent to which the available drying factories are employed from time to time, and is thus able at any time to specify factories not fully employed which are suitable for any kind of drying of agricultural products. As a result of negotiations undertaken at the instigation of the Central Office, the Office has now been entrusted with the working out of principles for the drying of agricultural products. Various Federal States have established special organisations for the promotion of drying. The number of industrial firms which supply drying plants and auxiliary machines for drying has increased considerably during the war; 56 firms now supply complete drying apparatus, and 37 other firms supply auxiliary machines and parts. In view of the increasing use of dried potato products and dried cabbage turnips for human food, the Central Office has organised comprehensive practical cooking experiments with these products; and on the basis of these experiments a pamphlet of recipes for the household use of dried potato products has been issued, which has run through large editions, and is still demanded both by communes and by the public. The Central Office has further organised the scientific examination of cabbage turnips dried in various ways, in order to obtain trustworthy evidence as to the best manner of drying. The results of these investigations have been laid before the organs concerned in the drying of cabbage

† "Trommelrockner."

THE CENTRAL EUROPEAN POWERS—continued.

turnips. In the technical sphere the Central Office has occupied itself with testing and approving new drying processes, and testing the capacity of completed drying factories. Public authorities, industrial firms, commercial drying factories, and agricultural circles alike have had increasing recourse to the Central Office for information both about economic questions connected with drying and about technical processes.

ORGANISATION OF LEATHER TRADE AND INDUSTRY IN BAVARIA.

An Association of Bavarian Leather Dealers was founded on 5th January by the already existing Leather Trade Associations of Upper Bavaria, Central Franconia, Lower Franconia, the Upper Palatinate, and Lower Bavaria (to which last the Lower Bavarian Tanners' Association is attached), in conjunction with numerous unorganised leather wholesalers and retailers. The object of the new Association is to act in agreement with the various leather trade associations in the German Empire with a view to the protection of the interests of the Bavarian leather trade. The occasion for the step was furnished by the preparations for the establishment of a Bavarian Leather Administration Combine ("Bayerische Lederwirtschaft"), which will include all Bavarian circles interested in the production, etc., of leather, raw materials of leather, and leather products. It was felt that the leather trade would be able to safeguard its interests effectively in this large combine only if a separate association, including all Bavarian leather wholesalers and retailers, were previously established.—(*Münchener Neueste Nachrichten*.)

CONCENTRATION OF HERRING FISHERIES.

For some time past endeavours have been made to amalgamate all the German herring-fishing companies with a view to the requirements of war economic conditions and of the subsequent transition period. A meeting of the united companies was recently held in Bremen, at which a War Committee of the German herring-fishing industry was appointed, which it is hoped will be able greatly to extend the industry after the war and so render it more independent of the foreign supply. That there is room for this is shown by the fact that whereas in 1913, herrings to the value of 84,000,000 marks were imported from abroad, the value of the German catch was only 13,000,000 marks.

The competent authorities have prohibited the supply of herrings to the trade except with the heads removed, in order that these heads may be utilised for the production of oil, albumen, and phosphate of lime.

UTILISATION OF FISH OFFAL.

Fish offal is now utilised in Germany to produce food for human beings, as well as for animals. Offals collected from fish preserving factories, restaurants, etc., is dried and (after the extraction of the oil) ground. The meal so obtained frequently contains 50 per cent. and upwards of albumen and phosphate of lime, the latter from the bones and heads. By chemical methods the albumen is extracted from the fish meal and rendered available for human consumption. From the oil, phosphate of lime for animal fodder is obtained by means of benzine, benzol, and other fat solvents. The oil is also used for various technical purposes. Specially good kinds can be hardened by hydration and rendered suitable for the production of eating fat. The hardened fat looks like tallow, and is almost odourless.—(*Rheinisch-Westfälische Zeitung*.)

UTILISATION OF WOOD IN THE MANUFACTURE OF COMBS.

Wood is now being largely substituted in Germany for ivory, celluloid, and other substances in the manufacture of combs. Excellent toilet combs, it is stated, are made from thinly-cut, faultless birch and beechwood, often from the waste from these woods. They are light in weight, pleasant in use, clean, and cheaper than any other kind. The new war combs include ornamental combs, which are frequently carved or painted.—(*Rheinisch-Westfälische Zeitung*.)

PRESENT CONDITIONS IN THE TOY TRADE.

The German toy industry is showing the effects of over three years of war. Simplicity is now the rule in toy shops. Wood, which was formerly used only for the cheaper sorts of toys, is now the chief material employed. The manufacture of new dolls is becoming impossible through want of flour, which, mixed with cement, forms the stuffing for the bodies. Wax, which is used for the heads of the better-class dolls, is almost unobtainable; the same remark applies to the stuffs and lace used for the making of dolls' shoes, hats, dresses, stockings, etc. These are only obtainable at prices four times higher than before the war. Consequently the prices of toys are from 150 per cent. to 200 per cent. higher. The simple cheap toys which the poorest could formerly buy from the shops or from the street dealers for a groschen (= 10 pfennigs) each, now cost 20 pfennigs or more. Jumping jacks of paper and cheap picture books can no longer be had, except where old supplies are still in stock. Metal toys are few in number. The pretty toy trains, magic lanterns, etc., which used to be so common, have been turned out only by those manufacturers who were also engaged in munition work, and so commanded supplies of the necessary materials.

THE CENTRAL EUROPEAN POWERS—continued.

Toys intended for export, but which could not be exported owing to the war, made a welcome addition to the supply for home consumption, large quantities of the better class of toys being thus put at the service of the home dealer. Great difficulties stand in the way of conveyance from the maker to the large towns, and only after long delay do toys reach the dealers.—(*Berliner Tageblatt*.)

MANUFACTURE OF "MOULDED" TULLE.

A laudatory description of a so-called substitute "tulle," known to manufacturers by the name "moulded tulle," is contained in the "Vorwärts." Dissolved cellulose is poured in a thin stream on to a roller in motion—the desired pattern being engraved on the roller—and a ribbon takes off the material when cold. Pieces of any length can be made. The solution resembles that from which artificial silk is obtained by the Chardonnet process, in which collodium is drawn out into fine threads. The new stuffs shine like silk. They can be dyed, gilded, silvered, etc., without getting rough, and are wonderfully effective. Moulded tulle is slightly inflammable, owing to the raw material from which it is made. Its meche is still more regular than that of woven tulle; its threads are quite smooth, whereas those of woven tulle are as rough as the fibres from which it is made.

AUSTRIA—HUNGARY.

THE BANKS IN 1917 AND THEIR PRESENT POSITION.

The following particulars concerning the development of the Austrian and Hungarian banks in 1917 and their present position are taken from the annual review on the subject in the "Frankfurter Zeitung," an article in the "Oesterreichische Volkswirt" on increases of bank capital, and a paragraph in the "Pester Lloyd" referring primarily to a new increase of capital on the part of the "Pester Ungarische Kommerzbank." They relate to Austrian banks, except where Hungarian banks are expressly specified.

The main feature of 1917, as of 1916, was the abundant flow of deposits into the banks and their investment preferentially in war loans. Advances to customers show a continued increase, in consequence of new issues and despite fairly regular repayments. War loan advances to savings banks and other financial institutions, on the other hand, have gradually declined in importance, because the increasing fluidity of money and influx of deposits make recourse to other banks unnecessary even for institutions weak in capital. Payments in advance to the Postal Savings Bank, however, continue to show an increase; according to a return of the Public Debt Control Commission for 5th December they amounted then to 5.3 milliards, so that they will not be exhausted by the share of the Seventh War Loan which falls to the banks, and considerable subscriptions have therefore been paid in advance to an eventual eighth war loan. The commercial debits of the banks show a continued and general decrease. So do current account debits. Among the reasons for this are the continued accumulation of industrial profits and the gradual stoppage of whole branches of industry (for example the textile industry, so far as it has not adapted itself to the working up of spinning paper and other substitute materials). On the other hand, many busy industries require more money as a result of the increase in costs of production and the necessity of procuring large supplies of material. During the last few months two further causes have operated to increase the debits of the banks against such concerns, namely—(1) the interruptions of work caused by coal shortage and transport difficulties, which retard production and delivery and therefore the return of money to the banks; and (2) the deferment of payments by the war administration, which arises from a desire to check the inflation of the note currency.

The security holdings of the banks have been greatly reduced by very profitable clearances not only of old stock, but also of new stock proceeding from increases of capital on the part of connected undertakings. Comparatively few new enterprises were undertaken. The period of foundations and extensions for war purposes came to an end for the most part in 1916. The inclination for such enterprises has been weakened by the increasing difficulty and expense of establishment and the uncertainty as to whether profitable working will be possible after the war. At the same time the interest of the war administration in such enterprises must have fallen off because the difficulties connected with coal supplies and raw material supplies make it doubtful whether they would mean any increase of output. New enterprises which will begin their activity after the war are for the most part still in a preparatory stage, and most of them are directed to the adaptation of old and new war material industries for peace purposes. Many projects aim at activity in the allied Balkan States and the occupied territories. Of these projects, some are concerned with the foundation of banks, few with industrial undertakings, more with trading enterprises. Organisations for tobacco trade in Turkey and Bulgaria occupy a prominent place.

THE CENTRAL EUROPEAN POWERS—continued.

Two limited companies with a combined capital of 10,000,000 kronen, in which the great Austrian and Hungarian petroleum concerns are participating as well as the banks, have just been established for the exploitation of the Rumanian crude oil wells. In this as in many other spheres co-operation with the German banking and industrial world is contemplated.

Among banks of the first order only the Unionbank has increased its capital during 1917. Many banks of the second order have undertaken an increase, and a new general increase on the part of the largest banks now appears to be in prospect. The Bodenkreditanstalt and the Länderbank are about to raise their capital from 63 to 75 and from 130 to 160 millions respectively, and have postponed the new issues only at the request of the Ministry of Finance until the period of subscription to the Seventh War Loan has lapsed.* As most banks desire to maintain their capital at a constant level relatively to that of other banks, the example of these two large institutions will probably be followed. The increase of banking capital during 1917 was more noticeable in Hungary than in Austria. Most of the Budapest banks have increased their capital twice during the year, and the Pester Ungarische Kommerzialbank, which has long lagged behind, is now undertaking an increase from 80 to 100 millions. Future developments may depend largely on factors which cannot yet be estimated. No bank is in immediate need of money, and whether such a need will appear after conclusion of peace is difficult to say. The "Volkswirt" points out that Austro-Hungarian banks have to reckon with one factor which does not exist for German banks. A large part of the borrowed money has been lent to the State on current account, and no security exists that they will be able to call in these debts in proportion as other borrowed money is withdrawn and commercial credit is required. It may well be a prudent policy in the circumstances for the banks to convert as much as possible of the borrowed money into shares of their own. The new bank shares are bought for the most part out of bank credits.

The banks have made heavy profits by dealings in securities on commission and on their own account, and the increase of deposits has, of course, increased their revenues from interest. Costs and taxation, on the other hand, continue to increase, and the precise form of the war profits tax is still unsettled. But, however heavy the burden of taxation, the banks will certainly be in a position to pay dividends at least as high as those paid last year.

NEW STEELWORKS COMPANY.

The Austrian Ministries of the Interior and Finance have granted permission to the Anglo-Austrian Bank, the Enzesfeld Munition and Metal Works Company, and Bernhard Wetzler, to found a new company, the "Leobersdorfer Stahlwerke A.G.," in Vienna, with a share capital of 6,000,000 kronen and power to increase it to 10,000,000 kronen. Other firms interested in the foundation are the Fiat Works and Castiglioni. The company has been building steelworks in Leobersdorf which are to be equipped with two Marius or open-hearth furnaces, electric furnaces, and a mill train. The object is to enable the Enzesfeld Company and the Fiat Works, which are consumers of steel, to supply their own steel.—(*Neue Freie Presse.*)

PRODUCTION AND FINANCIAL POSITION OF THE HUNGARIAN STATE IRON WORKS, 1916-17.

The production of the Hungarian State Iron Works decreased during the financial year 1916-17 in spite of more labour being employed. The financial results were as follows (in kronen): Income—from rents 753,082, from interest 454,366, from deliveries to the State Railways 67,492,475, from deliveries to foreign customers 45,266,266, from deliveries to home customers 22,146,281; expenditure—wages and social burdens 6,854,168, general expenses 1,318,020, taxes 419,718, business and other payments 111,486,692. The net profit was 16,030,521 kronen, against 14,123,008 in the previous year. The total capital for 1916-17 was 255.7 million kronen, an increase of 13.3 million kronen over that of the previous year.—(*Die Zeit.*)

MINISTER OF FOOD ON THE FOOD SITUATION.

The Austrian Minister of Food in a recent interview with a representative of "Die Zeit" stated that it would be as unwise for him to publish his plan of campaign as for a general in the field. To cover the demands of the non-producing population, he said,

*The "Volkswirt" expresses the opinion that the success of the war loans is no longer endangered by the issue of bank capital or by other proceedings on the stock exchanges. The yield of the war loans unfortunately shows no considerable development; but the classes which might greatly improve their results do not buy bank shares. It may even be the case that after increasing their own resources banks are the more ready to take large quantities of war loan themselves. The "Volkswirt" further points out that the Austrian Government has always possessed the right of approving or prohibiting new issues of capital, which has recently been conferred upon the German State Governments by Bundesrat Order.

THE CENTRAL EUROPEAN POWERS—continued.

430 truckloads of corn are needed per day. The home supply has never equalled the demand, and imports are necessary. Vienna, the Alpine and southern provinces, Bukovina, and East Galicia are not able to supply themselves. Productive provinces are Lower Austria, excluding Vienna, Upper Austria, Bohemia, Moravia, Silesia, and (in normal times) Galicia. For provisioning purposes the province of Salzburg is joined to Upper Austria. Galicia, normally a productive country, has now to supply the devastated district of East Galicia, and cannot export anything, but has to receive supplies. Imports from abroad depend on doubtful harvests. The bringing in of the harvest in Austria is slow, because only about 10 per cent. of the land is occupied by large properties, and about 90 per cent. by small farms. The small cultivator cannot thresh his corn in the autumn because he is busy with the potato and beet harvest and autumn sowing. This autumn things were made more difficult by the transport crisis caused by military movements. The position in this respect has somewhat improved of late. If the Danube remains free from ice there will be a further improvement in the export of maize from Rumania: the maize this year has dried earlier than usual.

Illicit trading presents a great obstacle to the administration of supplies, but the quantity of goods affected by it is much exaggerated. Among measures directed against it, besides far more prosecutions and punishments than come to the knowledge of the public, the Minister drew attention to the introduction of the "voluntary food service." A scheme for assisting the middle classes, persons with fixed incomes, small tradespeople, etc., similar to that for assisting the poorest classes, will be published shortly; it will involve the better organisation of the middle classes, the supply of food to them at moderate prices, and the establishment of communal kitchens and consumers' associations, with State aid or loans without interest; the money for this purpose is already to hand. The demand for a reduction of prices is justified, but all the economic factors in operation (short supplies, enormous demand, and depreciation of money, make for a rise in prices. It is especially necessary to take care, in lowering prices, that production shall not be endangered or diminished, and that the prices of different articles shall bear a proper relation to each other; else the production of some articles will be stimulated at the expense of others equally necessary. The Minister stated that his object is to prevent an increase of prices, and to begin reducing prices as soon as circumstances render this possible without danger to production. Austrian corn prices are at present lower than those ruling in Hungary and Poland, and do not differ widely from the prices in Germany.

MUNICIPAL KITCHENS IN BUDAPEST.

After long preparations, the middle-class and war kitchens in Budapest are about to begin operations. Four of the proposed ten war kitchens will open on the 20th January, and three more a few days later. The price of the midday meal at the war kitchens, consisting of soup and vegetables, will be 60 heller; several times in the week a meat course will be provided at 1.50 kronen. The midday meal in the middle-class kitchens will consist of three courses at a price of 2.50 kronen.—(*Pester Lloyd.*)

WOOD FLOUR IN BREAD.

Professor Dr. Salomon has been experimenting with a "wood bread" in a Vienna hospital. The wood flour used was a fairly fine powder made of white beech wood; 100 g. of this wood flour was mixed with 900 g. of ordinary flour; to the mixture were added $\frac{1}{2}$ litre of water, 30 g. of salt, and 40 to 60 g. of yeast, and the dough was prepared and baked in the usual way. The result was a purer bread than the present war bread, which was also pleasant to the taste and wholesome.—(*Die Zeit.*)

PLAN TO INCREASE AGRICULTURAL PRODUCTION.

Hungary is from an agricultural point of view a backward country. In 1913 the average yield of wheat per yoke was 7.63 quintals in Hungary, 13.56 in Germany, and 14.72 in Belgium. A systematic plan for the agricultural development of Hungary has been worked out by the Ministry of Agriculture. This includes the establishment of a Government Commission to increase production (which will hold all the threads of the plan), a reorganisation of national education in the country schools, and a reform of the Agricultural Statistical Department. There are at present 1,870 agricultural reporters for the 12,800 communes in Hungary; these are to be increased to 4,500 or 5,000, so that there will be one reporter for every two or three communes. The backbone of the whole scheme will be the agricultural expert officials—one for each district—to whom the reporters will report. The expert will thus be able to check the condition of agriculture in his district and learn the measures necessary to improve it. All the experts will be under the Royal Hungarian Agricultural Inspectorate, whose functions will be considerably enlarged. The plan will be brought into operation this spring.—(*Pester Lloyd.*)

Commercial Returns.

FISHERY STATISTICS FOR DECEMBER AND YEAR 1917.

The following statement shows the quantity and value of fish landed on the English and Welsh, Scotch and Irish coasts during the month and twelve months ended December, 1917, as compared with 1916:—

	Month of December.			
	1916.		1917.	
	Quantity. cwt.	Value. £	Quantity. cwt.	Value. £
England and Wales—				
Fish, excluding shell fish	258,235	505,761	232,877	794,735
Shell fish	—	28,432	—	27,219
Total value	—	534,192	—	821,954
Scotland—				
Fish, excluding shell fish	150,277	220,157	174,064	375,471
Shell fish	—	4,575	—	5,006
Total value	—	224,732	—	380,477
Ireland—				
Fish, excluding shell fish	45,078	40,139	23,418	41,286
Shell fish	—	1,187	—	1,293
Total value	—	41,326	—	42,579

	Twelve Months ended December.			
	1916.		1917.	
	Quantity. cwt.	Value. £	Quantity. cwt.	Value. £
England and Wales—				
Fish, excluding shell fish	4,244,181	7,222,965	4,051,325	9,150,594
Shell fish	—	327,862	—	335,154
Total value	—	7,550,827	—	9,485,748
Scotland—				
Fish, excluding shell fish	3,398,389	3,147,565	3,072,121	3,644,964
Shell fish	—	58,862	—	59,625
Total value	—	3,206,427	—	3,704,589
Ireland—				
Fish, excluding shell fish	531,078	421,164	570,933	567,376
Shell fish	—	14,508	—	14,907
Total value	—	435,672	—	582,283

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

COTTON IMPORTS AND EXPORTS.

Return of the Number of Bales of Cotton Imported and Exported at the Various Ports of the United Kingdom during the week and 4 weeks ended 24th January, 1918:—

	Week ended 24th Jan., 1918.		4 Weeks ended 24th Jan., 1918.	
	Week ended 24th Jan., 1918.	4 Weeks ended 24th Jan., 1918.	Week ended 24th Jan., 1918.	4 Weeks ended 24th Jan., 1918.
	IMPORTS.		EXPORTS.	
	Bales.	Bales.	Bales.	Bales.
American	37,100	165,953	—	100
Brazilian	—	1,129	—	—
East Indian	—	29,461	—	—
Egyptian	—	41,109	—	—
Miscellaneous	5,482	19,090	—	—
Total	42,582	256,742	—	100

COMMERCIAL RETURNS—continued.

CORN PRICES.

Statement showing the Average Price of British Corn, per quarter of 8 bushels Imperial Measure,* as received from the Inspectors of Corn Returns in the week ended 26th January, 1918, and corresponding weeks of the seven previous years, pursuant to the Corn Returns Act, 1882.

Week ended 26th January,	Average Price.		
	Wheat.	Barley.	Oats.
	s. d.	s. d.	s. d.
1918	71 1	58 7	48 2
Corresponding week in—			
1911	30 9	24 5	17 5
1912	33 8	32 10	21 3
1913	31 1	28 11	20 2
1914	31 1	26 6	19 1
1915	52 8	32 5	29 10
1916	58 0	51 0	32 11
1917	75 10	64 5	47 8

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

BRITISH CHAMBERS OF COMMERCE IN CERTAIN FOREIGN COUNTRIES

The following is a list of Chambers of Commerce established in certain foreign countries in the interest of British trade:—

Argentina.—British Chamber of Commerce for the Argentine Republic, Calle Reconquista 46, Buenos Aires. (Agent in London—Mr. J. Ballantyne, River Plate House, 13, South Place, E.C. 2.)

Belgium.—British Chamber of Commerce in Belgium (Incorp.). During the war the address will be: c/o London Chamber of Commerce 97, Cannon Street, E.C. 4.

Brazil.—British Chamber of Commerce in Brazil, Rua da Quitanda, No 143, Rio de Janeiro. British Chamber of Commerce of São Paulo, 26 Rua 15 de Novembro, São Paulo.

Chile.—British Chamber of Commerce in the Republic of Chile, Valparaiso.

China.—British Chamber of Commerce, 1, The Bund, Shanghai.

British Chamber of Commerce, British Municipal Council Building, Hankow.

British Chamber of Commerce, Canton.

Changsha Chamber of Commerce, Changsha.

Chefoo Chamber of Commerce, Chefoo.

Foochow Chamber of Commerce, Foochow.

Mukden British Chamber of Commerce, c/o British Consulate-General, Mukden.

Newchwang British Chamber of Commerce, c/o British Consulate, Newchwang.

Swatow Chamber of Commerce, Swatow.

Tientsin British Chamber of Commerce, Tientsin.

Peking British Chamber of Commerce, Culty Chambers, Peking.

Egypt.—British Chamber of Commerce of Egypt, 6, Rue de l'Antienne Bourse, Alexandria, and Savoy Chambers, Cairo.

(Agents in Suz and London—Messrs. Back & Manson, Egypt House, 36, New Broad Street, E.C. 2.)

France.—British Chamber of Commerce, Paris (Incorp.), 6, Rue Halévy, Paris, IXème.

(Correspondents in all the principal towns of France. Commercial Representative in France of the Commonwealth of Australia.)

British Chamber of Commerce for the French Riviera and Principality of Monaco, 4, Avenue Massena, Nice.

Italy.—British Chamber of Commerce for Italy, 7, Via Carlo Felice, Genoa (with Sample Show Rooms for British goods).

Branches—

75, Via Delle Terme, Rome.

12, Via Silvio Pellico, Milan.

Scali d'Azeglio 3 p. p., Leghorn.

Via A Depretis, 31, Naples.

H.M. TRADE COMMISSIONERS.

British India.—A Trade Commissioner in India has recently been appointed. His headquarters will be at Calcutta.

Canada and Newfoundland.—H.M. Trade Commissioner, 363, Beaver Hall, Montreal. Telegraphic Address, "Britcom."

An additional Trade Commissioner in the Dominion has recently been appointed.

Commonwealth of Australia.—H.M. Trade Commissioner, Commerce House, Melbourne; Telegraphic Address, "Combrit"; and Royal Exchange, Sydney; Telegraphic Address, "Combritto."

New Zealand.—H.M. Trade Commissioner, P.O. Box 369, Wellington. Telegraphic Address, "Advantage."

South Africa.—H.M. Trade Commissioner, P.O. Box 1346, Cape Town. Telegraphic Address "Austere."

TRADE ENQUIRY OFFICES IN LONDON.

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

Dominion of Canada.—19, Victoria Street, S.W. 1; also Portland House, Basinghall Street, E.C. 2 (Office of the Canadian Government Trade Commissioner).

Commonwealth of Australia.—Australia House, Strand, W.C. 2. New South Wales.—Sydney House, 26-7, Cockspur Street, Trafalgar Square, S.W. 1.

Victoria.—Melbourne Place, Strand, W.C. 2.

Queensland.—409, West Strand, W.C. 2.

South Australia.—112, Strand, W.C. 2.

Western Australia.—Savoy House, 115-6, Strand, W.C. 2.

Tasmania.—56, Victoria Street, S.W. 1.

Dominion of New Zealand.—413, Strand, W.C. 2.

Union of South Africa.—Trades Commissioner, 90, Cannon Street, E.C. 4.

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

NOTICE :

Subscriptions and Advertisements.

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

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

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

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).

FOREIGN AND COLONIAL PUBLICATIONS RECEIVED.

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

Commercial, Financial, and Economic.

Canada : Export Trade Prospects.

"Hardware and Metal" (Toronto), 3rd November.

Japan-China Exchange Bank Organisation.

"Commerce Reports" (Washington), 13th December.

Japan : (a) Foreign Trade during January-September 1917.

(b) Statistical Tables of Trade, Banking, Exchange, etc.

"Chamber of Commerce Journal" (Yokohama), November.

Argentina : Foreign Trade, January-June, 1917.

"Commerce Reports" (Washington), 30th November.

Russia in Asia : Trade Conditions in Siberia.

"Weekly Bulletin of the Canadian Department of Commerce" (Ottawa), 17th December.

Brazil : Development of Export Trade.

"Commerce Reports" (Washington), 1st December.

Metals, Mining, and Machinery.

Woodworking Machinery Markets in Italy.

"Commerce Reports" (Washington), 13th December.

Review for 1917 of the Silver Market in the United States.

"Journal of Commerce" (New York), 2nd January.

Growing Machinery Market in China.

"Commerce Reports" (Washington), 11th December.

Irrigation Requirements in South Australia.

"Journal" of the Department of Agriculture of South Australia (Adelaide), September.

Shipping and Transport.

Motor Road Construction in Hong Kong Island.

"Commerce Reports" (Washington), 30th November.

Wooden Shipbuilding Industry in Canada.

"Canada Lumberman and Woodworker" (Toronto), 15th November.

Textiles and Textile Materials—

Trans-Caucasian Cotton Crop in 1916.

"Textile Zeitung" (Berlin), 11th December.

Cotton Spinning Industry in Japan in 1916 and January-June, 1917.

"Indian Trade Journal" (Calcutta), 23rd November.

Agricultural and Forest Products.

Cacao Cultivation in the Dominican Republic.

"Commerce Reports" (Washington), 4th December.

(1) Wine Production in France in 1916-17.

(2) Crop Reports from the various Spanish Provinces.

"Boletín de Agricultura Técnica y Económica" (Madrid), November.

Olive and Olive Oil Production in Andalusia.

"Boletín de las Camaras de Comercio" (Madrid), November.

Tobacco Industry in Honduras.

"Commerce Reports" (Washington), 10th December.

Agriculture in the Madras Presidency, 1916-17.

"Indian Trade Journal" (Calcutta), 23rd November.

Miscellaneous—

Paper, Softened and A-sphalted, used for Wrapping Merchandise.

"Journal of Commerce" (Washington), 3rd January.

Cinematograph Film Industry in Germany.

"Frankfurter Zeitung," 17th December.

Marking of Merchandise for Chilean Destinations.

"Weekly Bulletin of the Canadian Department of Commerce" (Ottawa), 3rd December.

Experiments with Pepsin to replace Rennet.

"Queensland Agricultural Journal," October.

Waste Sulphite Lignin and its Conversion into Alcohol.

"Pulp and Paper Magazine" (Montreal), 20th December.

Situation in the Cement Industry in Germany.

"Frankfurter Zeitung," 5th December.

Rabbit Skins used as Boot Leather.

"Weekly Bulletin of the Canadian Department of Commerce" (Ottawa), 17th December.

Talking-Machine Trade in India.

"Commerce Reports" (Washington), 11th December.

OTHER PUBLICATIONS RECEIVED.

Australia—

South Australia—Statistical Register for 1916; Part II. Law, Crime, etc.

Western Australia—Statistical Register for 1916 and previous years.

Canada—

Montreal Chamber of Commerce: Special Bulletin for 1917.

Department of Commerce: Thirty-eighth Annual Report of the Ontario Agricultural and Experimental Union.

Belgium—Department of Agriculture: Insects and other Animals infecting the Cocoa Tree of the Belgian Congo.

United States—

Department of the Interior: Mines Report: Gold, Silver, Copper and Lead in Alaska in 1916.

Bureau of Entomology; Journal of Agricultural Research Vol. XI. No. 3.

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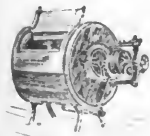


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BUYERS' GUIDE—continued.

- Dermatine for various Purposes—**
Hose, Belting, Packing Rings, Air Pump Valves, etc. Dermatine Co., Ltd., Neate Street, London, S.E. 5.
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Ashton, Thomas A., Ltd., Sheffield.

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Stevens, James, & Son, Birmingham.

Letter Files—

King Brothers, 15, Bury Street, London,
E.C. 3. Lever and Flat Files, Perforators
and Clips.

Lifts—

Smith, Major, & Stevens, Ltd., Abbey Works,
Northampton.

Steven, A. & P., Provanside Works, Glasgow.
Waygood-Otis, Ltd., Falmouth Road, London,
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Lime Juice—

Idris & Co., Ltd., London, N.W.

Lithographic Plates, Blanketing and Materials—

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Holbeck, Leeds.

Locks, Frames and Fittings for Leather Goods—

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Birmingham. (Manufacturer of all kinds.)

Locomotive Engine Builders—

Aveling & Porter, Ltd., Rochester.

Lubricants—

MacArthur & Jackson, Glasgow.

Prices' Company, Ltd., Battersea, London,
S.W.

Lustre Tiles—

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

Magnesia—

Blackwell, G. G., Sons & Co., Ltd., The
Albany, Liverpool, and at 10, Eastcheap,
London, E.C.

Henry, T. & W., East St., St. Peter's, Man-
chester.

The Washington Chemical Co., Ltd., Wash-
ington Station, Co. Durham. Sole Manu-
facturers of "Pattinsons" brand Car-
bonate of Magnesia, Calcined Magnesia
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Manufacturing Purposes; also Fluid Mag-
nesia. T. A.: "Chemical," Washington
Station.

Western Chemical Co., Greenock, Scotland,
makers of "Thistle Brand" Carbonate of
Magnesia, Calcined Magnesia (Light and
Heavy), Magnesia Cement, and White
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Albany, Liverpool, and at 10, Eastcheap,
London, E.C.

The Eglinton Silica Brick Co., Ltd., 45,
Renfield Street, Glasgow.

Magneto Manufacturers—

British Lighting and Ignition Co., Ltd. (Pro-
prietors: Vickers, Ltd.), 204, Tottenham
Court Road, London, W. 1.

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

Magnetos and Magneto Spares—

Watson, Stanley J., Berners Works, 37
Sheen Road, Richmond. Telegrams—
"Roussillon." Richmond, Surrey. Tele-
phones—1386 and 1733 Richmond.

Manganese—

Blackwell, G. G., Sons, & Co., Ltd., The
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House, Billiter Street, E.C.
Cross, Alexander, & Sons, Ltd., 19, Hope
Street, Glasgow.
Hedworth Barium Co., Ltd., Newcastle.

Map Makers—

Bacon, G. W., & Co., Ltd., 127, Strand,
London, W.C. Telephone: Regent 3077.

Map Publishers—

Philip, George, & Son, Ltd., 32, Fleet Street
London. Map and Colour Printers, Litho-
graphers.

Marine Glue—

Jeffery, Alfred, & Co., Stratford, London, E.
Telegrams: "Marine Glue, London."

Measure Makers—

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London, E. 2. For Surveyors, Tailors, and
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Magnolia Anti-Friction Metal Company of
Great Britain, Ltd., 49, Queen Victoria
Street, E.C. Telegrams: Magnolier, London.
McKechnie Brothers, Ltd., Rotton Park
Street, Birmingham.

Moore Bros., Ltd., Priory Works, Priory
Road, Aston, Birmingham.

Metal Merchants—

Garnham, J. B., & Sons, 132, Upper Thames
Street, London, E.C. 4.

Metal Merchants and Manufacturers—

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Dugard Bros., Bridge Street, Birmingham.

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Barron, W. S., & Son, Kingsholm, Gloucester

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Camwal, Limited, 112, Pembroke Street, N.
Idris & Co., Ltd., Camden Town, London,
N.W.

Miners' Safety Lamp Makers—

Ackroyd & Best, Ltd., Morley, near Leeds.

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Gillott, John, & Son, Lancaster Works
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Monastic Tiles—

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

Mono-Bl. and Tri-Nitrotoluol—

Leitch, John W., & Co., Milnsbridge Chemi-
cal Works, Huddersfield (Eng.).

Mosaic and Tiles Decoration—

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

BUYERS' GUIDE—continued.

Billiard Balls, Vegetable Ivory, Tortoiseshell and General Merchant—
Myers, M., 15/18, Tower Hill, London, E.C.

Motor Car Lighting (Electric)—
Vandervell, C. A., & Co., Ltd., Warple Way, Acton Vale, W.

Motor Cars—
Auto-Carriers (1911), Ltd., 181, Hercules Road, Westminster Bridge Road, London, S.E.
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Needles—
Moore, George, National Works, Redditch, London and Export Agents, Wilfred Turner & Co., Ltd., 30, Craven Street, Strand, W.C. 2. Surgical Needles of every description; specialists in Hypodermic Needles. Also for "Record" and all other Hypo-syringes. Wilfred Turner & Co., Ltd. Phone 2221 Gerrard.

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Nickel and Nickel Salts—
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Nickel Silver and Electro Plate—Spoons and Forks—
Tay, W., & Sons, Ltd., 30/34, Leopold Street, Birmingham. Eureka Spoons and Forks.

Night Lights—
Prices' Patent Candle Co., Ltd., London, S.W.

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Oil and Grease Manufacturers—
Adolph Hess & Bro., Ltd., Kirkstall Road, Leeds. Oleines (Distilled and Soluble), Stearines, Pitches, Woolfats.
Dexters, Ltd., 362, City Road, London, E.C.
Grindley & Co., Ltd., Poplar, London, E.
Tels: "Resinous Pop. London."
Snowdon, Sous, & Co., Ltd., Millwall, London, E.
Manufacturers of Snowdrift, Snozone, Snowdene and Sinol (Cylinder) Lubricants.
Stern's Ltd., Royal London House, Finsbury Square, London, E.C.
Vickers, Benjn., R., & Sons, Ltd., Gascoigne Street, Leeds. Wool Spinning Oils, Shoddy, Rope and Leather Oils, Steam Ship Oils, and Lubricants.

Oil and Grease Merchants—
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Rose, Downs & Thompson, Ltd., Old Foundry, Hull, and 12, Mark Lane, London, E.C. Latest and most up-to-date systems of seed crushing oil extraction, refining, etc.

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Paley & Donkui, Ltd., Cottingham, near Hull. Telegrams: "Donkin, Cottingham-Yorks." Code: 5th Edition, A. B. C. Telephone: 200 Cottingham.

Oil Refiners, Distillers, and Manufacturers—
Adolph Hess & Bro., Ltd., Kirkstall Road, Leeds.
Prices' Company, Ltd., Battersea, London, S.W.
Reesoils, Ltd., 1, Eldon Square, Newcastle-on-Tyne. "Reesileo" Non-sludging Oil for Transformers, H. T. Switches, Turbines, Motors. Cylinder Oil for Steam, Diesel, Gas, Air Compressors, etc. London House: 17, Victoria Street, S.W.
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Stern's, Ltd. (Soluble, Insulating, Transformer, Turbine, Screw-cutting, Leather, Motor, etc. Oils), Royal London House, Finsbury Square, London, E.C.

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- Ores—**
Blackwell, G. G., Sons, & Co., Ltd., The Albany, Liverpool, and at 10, Eastcheap, London, E.C. Purchasers and dealers in Wolfram, Molybdenite, Vanadium, Chrome, Manganese, and all Metalliferous Ores.
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Withey, A. W., & Co., 7, Leonard Street, Finsbury, London, E.C.
- Oxalic Acids—**
Barr, James C., Ltd., Chemical and Colour Merchants, 27, Blythswood Square, Glasgow.
- Oxy-Acetylene Metal Cutting and Welding Plants—**
The Acetylene Corporation, Ltd., 49, Victoria Street, Westminster, London.
Imperial Light, Ltd., 123, Victoria Street, London, S.W.
- Packings, Hydraulic and Pump—**
Snowdon, Sons, & Co., Ltd., Millwall, London, E. Snowdon's Metallic Packing.
- Packings, Hydraulic and Pump, S.E.A. Rings—**
Trist, Ronald & Co., Ltd., 4, Lloyd's Avenue, London, E.C.
- Paint Manufacturers—**
Dampney, J., & Co., Ltd., Cardiff. London Office, 87, Bishopsgate, E.C.; also at Liverpool, Manchester, Leeds, Newcastle-on-Tyne, and Paris. Specialities for Iron and Steel Structures, Water Tanks, etc., "Miraculum" Graphite Paint, "Asphaltene" bituminous paint, etc.
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Holden, Arthur, & Sons, Ltd., 218/219, Bradford Street, Birmingham. Paints, Colours, Enamels, Varnishes, Lacquers, Japans.
Hoyle, Robson, Barnett & Co., Ltd. Established 1798. Head Office: Newcastle-on-Tyne.
Pilcher, Ltd., Morgan's Lane, London, S.E. Colours, Paints, Varnishes, Enamels, Distempers. Sole Proprietors of "Pilcher's Stoprot" and "Pilcher's Rustnot" Preservatives.
Sanderson, A., & Co., Ltd., Kingston Paint, Colour and Varnish Works, Hull. Established 1853. Telegrams: "Varnish, Hull." Manufacturers of Paints, Colours, Varnishes, Enamels, Compositions, Distempers, etc.
- Paper Bag Makers—**
Crowther & Co., 115, Middlesex Street, London.
Smith, Stone & Knight, Ltd., Union Paper Mills, Landor Street, Birmingham.
- Paper Fasteners—**
Proctor, Avery & Wood, Chapel Works, Bond Street, Birmingham.
- Paper Makers and Stationers (Wholesale and Export)—**
Bowater, W. V., & Sons, Ltd., 159, Queen Victoria Street, London, E.C.
Hodgkinson, W. S., & Co., Wells, Somerset.
Strong, Hanbury & Co., Ltd., 197, Upper Thames Street, London, E.C.
- Paper Makers—**
Lloyd, Edward, Ltd., 4 and 5, Salisbury Court, London, E.C.
Tullis, Russell & Co., Markinch, Fife.
- Paper Shavings—**
Powell, Lane & Co., Paper Works, Gloucester, England.
- Paraffinum Liquidum and Petroleum Jellies—**
Snowdon, Sons, & Co., Ltd., Millwall, London, E. B.P. & Technical qualities.
Stern's, Ltd., Royal London House, Finsbury Square, London, E.C.
- Patent Fuel Machinery—**
Middleton & Co., Robert, Sheepscar, Leeds.
- Patent Fuel Manufacturers and Shippers—**
The Crown Preserved Coal Co., Ltd., Cardiff.
- Pavement Light Lenses—**
Stevens, James, & Son, Victoria Glass Works, Birmingham.
- Pencils (Manufacturers of "C B" and all Classes for Home and Export)—**
Chambers & Co., Ltd., Stapleford, Notts., England.

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- Pen Manufacturers (Steel and Metal)—**
Hinks, Wells & Co., Buckingham Street Steel Pen Works, Birmingham.
- Perforated Metal—**
Harvey, G. A., & Co. (London), Ltd. (late of Lewisham), Greenwich Metal Works, Woolwich Road, London, S.E.
- Petroleum Jellies and Oils—**
Meade-King, Robinson & Co., Ltd., Liverpool.
Stern's, Ltd., Royal London House, Finsbury Square, London, E.C.
- Petrous Flooring Tiles—**
Carter & Co., Ltd., Encaustic Tile Works, Poole.
- Phosphor Bronze—**
Billington & Newton, Longport, Staffs.
Clifford, Charles, & Son, Ltd., Birmingham.
- Photographic Lens and Camera Manufacturers—**
Ross' Optical Works, 3, North Side, Clapham Common, S.W.
- Photographic Papers, Films and Plates—**
Rajar, Limited, Mobberley, Cheshire (Estd. 1901).
- Pictorial Postcards—**
Hunt, Philip G., & Co., 332, Balham High Road, London, S.W. Real photos by automatic machinery.
- Pitch—**
Miller, Jas., Son, & Co., 79, West Nile Street, Glasgow.
- Plate Polish—"Silveret"**
The Nubian Manufacturing Co., Lorrimer Street, London, S.E.
- Plumbago—**
Blackwell, G. G., Sons, & Co., Ltd., The Albany, Liverpool, and at 10, Eastcheap, London, E.C.
- Plywood—**
Venesta, Ltd., 1, Great Tower Street, London, E.C. "Venesta" Plywood in all woods. Write for Descriptive Booklet.
- Polishing Machinery and Materials—**
Canning, W., & Co., Great Hampton Street, Birmingham.
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- Post-Cards—**
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Kennedy, H., & Sons, Ltd., Barrowfield Potteries, Glasgow.
- Power Transmission—**
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Waller & Co., Ltd., 28/32, Vauxhall Walk, London, S.E. Simple Canister-making Plants for double-seamed, slip-over, or lever-tins. Telegraphic Address—"Stampings, London."
- Pressure Gauges—**
Salter, Geo., & Co., West Bromwich.
- Printers (Catalogue)—**
Barnicott & Pearce, The Wessex Press, Taunton. Telegrams: Barpearce, Taunton. Codes: A.B.C. and Unicode. Telephone 26.
- Printers' Leads and Clumps—**
Taylor & Watkinson, Belgrave Foundry, New Briggate, Leeds. Machine Cast and Planed Leads and Clumps. Cable: "Pica," Leeds. Telephone: 4011 Central. Code: A. B. C. 5th Edition.
- Printers' Metals—**
Blackwell, G. G., Sons, & Co., Ltd., The Albany, Liverpool, and at 10, Eastcheap, London, E.C.
- Printing Ink Manufacturers—**
Dane & Co., Manufacturers of Printing Inks, Colour Varnishes, etc., London and Edinburgh.
Horsell, Frank, & Co., Ltd. Manufacturers, Printing Inks, Colours, Varnishes, etc. Victoria Road, Leeds, S.; also London, Birmingham and Edinburgh, etc.
Winstone, B., & Sons, Ltd., London.
- Prism Binocular Manufacturers—**
Ross' Optical Works, 3, North Side, Clapham Common, S.W.

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- Proprietary Articles, Specialities, &c.—**
Dalmas, A. de St., & Co., Leicester. (Medical Plasters.)
Henry's Calcined Magnesia (T. & W. Henry), Manchester.
- Provisions (Export and Import)—**
Pearson & Rutter, Ltd. Established 1812. 41, Stanley Street, Liverpool. (Cable: "Pearutter," A. B. C. 5th Edition.)
Warren, Sons, & Co., Aldgate East, London, E. Ham, Bacon and Cheese Specialists. Cables: "Daydawn, London." A. B. C. Code, 5th Edition.
- Pump Governors—**
Trist, Ronald & Co., Ltd., 4, Lloyd's Avenue, London, E.C.
- Rag Merchants—**
Jacobs Bros. & Co., West End Mills, Dewsbury. Cables: "Whatever, Dewsbury."
- Railway Appliances—**
Sarby & Farmer, Ltd., Head Offices, 53, Victoria Street, Westminster, S.W. 1, and Works, Chippenham, Wilts. (Railway Signals, etc.)
- Railway Lamp Lenses—**
Stevens, James, & Son, Victoria Glass Works, Dartmouth Street, Birmingham.
- Railway Signals—**
Sarby & Farmer, Ltd., Head Offices, 53, Victoria Street, Westminster, S.W. 1; and Works, Chippenham, Wilts.
- Rail Welding—**
Thermit, Ltd., 675, Commercial Road, London, E.
- Rainproof Cloth Manufacturers—**
Garnett, G., & Sons, Led., Apperley Bridge, Yorkshire.
- Ramie Yarns—**
The Yorkshire Ramie Spinning Co., Ltd., Kirkstall, Leeds.
- Recorders (Mechanical or Electrical Level and V Notch)—**
Kent, Geo., Ltd., High Holborn, London, W.C.
- Refrigerating Machines—**
Sterne, L., & Co., Ltd., The Crown Iron Works, Glasgow.
- Refrigerators—**
Haslam Foundry & Engineering Co., Ltd., The, Derby.
- Retorts—**
Stevens, J., & Son, Dartmouth Street, Birmingham.
- Ropes for Driving—**
Hart, Thomas, 12 and 14, Town Hall St., Blackburn; Lambeth Rope Works, Blackburn. Telephone: 10 Blackburn. Telegraphic Address: "Hart, Blackburn."
- Ropes (Manila and Wire Ropes)—**
Hall's Barton Ropery Co., Ltd., 83, High Street, Hull. Manufacturers of Manila, Hemp, Coir, Cotton and Steel Wire Ropes.
- Ropes (Steel Wire)—**
Cradock, G., & Co., Ltd., Wakefield, England.
- Ropes (Wire and Hemp), Cordage, Twines, &c.—**
Wright, John & Edwin, Ltd., Universe Works, Garrison Street, Birmingham.
- Ropeways, Aerial—**
Cradock, G., & Co., Ltd., Wakefield, England.
- Rosin Distillers—**
Grindley & Co., Ltd., Poplar, London, E. Tels.: "Resinous, Pop. London."
- Rubber Bands and Erasers—**
Tennyson & Co., Ltd., Leeds.
- Sacks and Bags—**
Judge, T. & W., London, E.C. (Cotton).
Kalisky, S., 50A, Princes Square, St. George's London, E. Telephone: Avenue 3134.
Paiva, J. de, & Co., 11, Drury Lane, Liverpool.
- Sacks, Bags, Jute, Hessians, Tarpaulins, Twines, &c.—**
Macdiarmid, A. M., & Co., Manufacturers, 165, Victoria Road, Dundee, Scotland. Contractors to H.M. Government. Telegrams: "Expansion, Dundee."
- Sacks, Bags, Jute Hessians, Tarpaulins, Yarns—**
Duncan, George & Co., 94, Commercial Street, Dundee.
- Saddlery—**
Cliff, Jabez, & Co., Globe Saddlery Works, Walsall.
Leckie, John, & Co., Goodall Street, Walsall, and 84, Fore Street, London, E.C.

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Hobbs, Hart & Co., Ltd., London, N.
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dlewich, Cheshire.

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Mansfield, H. R., Church Gresley, Burton-on-
Trent.

Saw Mill Engineers—
Robinson, Thomas, & Son, Ltd., Rochdale.
London: 79, Queen Victoria Street, E.C.

Scale Manufacturers—
Pooley, Henry, & Son, Ltd., John Bright
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Seeds—
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Bank, St. Mary Axe, London, E.C. 3.
Van Oppen & Co., Ltd. Head Offices and
Export Department: 90-91, Bartholomew
Close, London, E.C.1. Import and Storage
Department: 23-24, Little Britain, London,
E.C.1. Telephones: 1770 City (5 lines). Tele-
grams for London and Branches: "Van-
oppen." Also at Belfast, Birmingham,
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Boulogne, Rotterdam, Amsterdam.

Ship and Engineers' Furnishers—
Loveridge, Ltd., Cardiff (Admiralty Con-
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Ship's Block Manufacturers—
Loveridge, Ltd., Cardiff. (Admiralty Con-
tractors.)

Ship's Lamp Lenses—
Stevens, James, & Son, Victoria Glass Works,
Dartmouth Street, Birmingham.

Shirt and Collar Manufacturers—
Nimmon, R., & Co., Ltd. Established 1898.
Crown Factory, Londonderry. Telegraphic
and Cable Address: "Nimmon Factory,
Londonderry."

Shop Fittings—
Harris & Sheldon, Ltd., Stafford St., Bir-
mingham.
Sage, Fredk., & Co., Ltd., Shopfitting
Specialists, Gray's Inn Road, London,
W.C.; and at Paris, Buenos Aires, Val-
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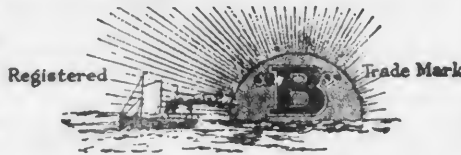
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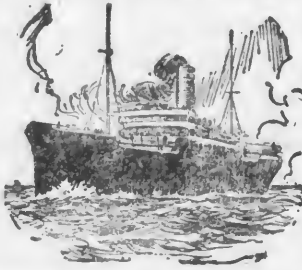
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