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BOARD OF TRADE



JOURNAL
AND
COMMERCIAL GAZETTE

(REGISTERED AS A NEWSPAPER)

Vol. CII. (New Series.) No. 1154.]

JANUARY 9th, 1919.

[Price Sixpence.]

SPECIAL CONTENTS.

EXPORT PROHIBITIONS: FURTHER RELAXATIONS.

—
THE SEA TRAINING SCHOOL.

—
MESOPOTAMIA:
I.—RESOURCES AND POSSIBILITIES.

—
WAR TRADE OF JAPAN:
PROSPERITY OF COMMERCE AND INDUSTRY.

—
ZINC PRODUCTION AND SUBSIDIARY INDUSTRIES
IN AUSTRALIA.

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23, FORTH STREET, EDINBURGH;
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DIRECT COMMUNICATION WITH TRADERS.

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

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

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

The BRITISH INDUSTRIES FAIR, 1919, will be held in the Pennington Street premises of the London Docks,

which have again been placed at the disposal of the Board of Trade by the Port of London Authority. It will be open from 24th February to 7th March. The Office dealing with Fair matters is at 10, Basinghall Street, London, E.C. 2.

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

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

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

OPENINGS FOR TRADE AND NAMES OF TRADERS IN COUNTRIES ABROAD.

Confidential Information.

SPECIAL REGISTER.

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

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

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

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

FORM K.

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

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

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

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

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

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

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

The system is safeguarded by agreements with the distributing organisations against the issue of the information to any outside firms. All firms who wish to receive the information have to be approved by the Department. At present over 10,000 firms have joined, and any other firms who wish to participate should apply through their Chamber of Commerce or the Federation of British Industries (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.

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JANUARY 9TH, 1919.

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The Board of Trade.

EXPORT PROHIBITIONS.

FURTHER RELAXATIONS.

We publish to-day a further list of relaxations in export prohibitions which are announced by the Board of Trade to take effect at once. Previous lists were published in the "Journal" of 14th, 21st and 28th November, and 5th, 12th, 19th and 26th December, 1918, and 2nd January of this year.

COTTON CONTROL BOARD.

THE WORKING OF MACHINERY.

The Cotton Control Board have had under consideration the question of permitting the working of an increased amount of machinery, and they intimate that it is their intention to give such permission as soon as and in so far as the general situation warrants. In the meantime they are in consultation with the authorities with a view to securing the speedy release from the Army of the men who will be necessary to start up the additional machinery. For the present no increase in the amount of machinery worked can be permitted.

TOBACCO CONTROL.

RESTRICTIONS REVOKED.

The Board of Trade have made an Order revoking as from the 11th January, 1919, the various Tobacco Restriction Orders made by them under the Defence of the Realm Regulations.

The effect of this revocation is that from the date named all the powers exercised by the Tobacco Control Board in regard to the control, importation, distribution and prices of tobacco will be abolished.

PETROL CONTROL.

APPLICATIONS FOR LICENCES.

Owing to the withdrawal of the restrictions on the use of motor spirit, the Petrol Control Department are receiving daily as many as 7,000 applications for new licences and for increased allowances on existing licences. The Department are making every effort to deal with these applications with as little delay as possible, and it would be of great assistance to them if applicants would be careful to quote the numbers of their licences or to give references to any previous correspondence.

COAL CONTROL.

INCREASED RATIONS OF GAS AND ELECTRICITY.

The Coal Controller announces an increase of 25 per cent. in the ration of gas and electricity to household consumers, beginning with the New Year. For the present this concession relates only to England and Wales, and does not apply to Scotland. At the same time it is proposed by arrangement with the Ministry of Munitions to suspend all restrictions on the fitting of gas and electric equipment. The text of the official notice issued under the Household Fuel and Lighting Order, 1918, is published in our "Government Notices" Section.

SALE OF COAL (IRELAND) ORDER.

The main purpose of the Sale of Coal (Ireland) Order, 1919, which was made by the Board of Trade on the 3rd inst., is to meet difficulties that have been experienced in controlling coal prices in Ireland owing to the lack of precise information as to the quality and the original cost of the coal sold.

The Order also deals with the irregular practice of purchasing coals at the controlled prices for home con-

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sumption and re-selling on the basis of the higher prices applicable to bunkers.

The first provision of the Order has been rendered necessary by the practice of requiring the purchase of kindling wood, etc., at excessive prices as a condition of the supply of coal.

The text of the Order, which takes effect as from 13th January, is given in our "Government Notices" Section.

THE SEA TRAINING SCHOOL

WORKING THE NEW SYSTEM.

Early last autumn it was decided by a conference of the Board of Trade and Ministry of Shipping to institute a new system of training youths for sea-service to meet the present and expected shortage of men in the Mercantile Marine. The scheme was inaugurated in September by acquiring premises for the Sea School ashore at Gravesend and also by the taking over of the training-ship *Stork* at Hammersmith and moving the vessel to her new moorings off Gravesend. A crew of forty youths under the supervision of Chief Officer Barfield and Instructors Briers and Gilbert carried out the dismantling of the vessel necessary to enable her to pass under the London bridges, which, with the work of refitting her at Gravesend, afforded a unique opportunity to make a practical start in the lads' training, since the topmasts and lower masts had to be unshipped as well as the davits.

The school at Gravesend was opened on the 23rd September, and training in knotting, splicing, boat-handling, rowing, swimming, heaving the lead, knowledge of the compass, steering, signalling, cleaning brass and bright work, scrubbing, preparing and serving the mess, and other practical duties on board ship was at once commenced under Captain O. H. Lewis, Chief Officer Macarthy, and Instructors Webb, Sugg and Whittington for the deck, and Instructor Atkinson for the coal-trimmer section of the school. Habits of strict discipline are inculcated, and alert politeness strictly enforced.

The minimum physical standard of candidates is, height 5 ft. 2½ in. and chest measurement 32 in.; the age limits are 15½ and 18 years. Applicants are at once measured, and when found satisfactory are given their application and medical certificate forms, with instructions to return them accompanied by testimonials from their schoolmaster or clergyman and one from an employer, if possible. Those intending to become sailors must pass the Board of Trade eyesight tests for form and colour. The youths whose papers and tests are satisfactory are registered, and each is given a rotation number which determines his priority in entering the school as vacancies occur; the present capacity of the school is 200. Great care has been shown in the choice of candidates, and, generally speaking, they are fine, stalwart lads with keen enthusiasm for their work.

Some fine ship models, which have been lent to the school by shipowners, afford excellent facilities for the lads to become interested in and memorise the different parts and equipments of ships. Loans of this kind are much appreciated by the Captain and Instructors, whose valuable time and labour are thereby economised.

Steering is taught by Professor Thomas's Moving Stand in the school, the training being completed on the Board of Trade launch *Mantis* by practical instruction under the master and mate of that vessel. The training of trimmers is carried out by Instructor Atkinson at the local gasworks, where the youths handle coke and coal in top-heavy barrows, the balancing of which teaches them how to handle barrows on board ship; they are also taught to clean fires and stoke, some of them boarding the *Mantis* daily for instructions by the engineer in raising and keeping steam and banking fires. Many of the lads become adepts at ordinary knotting and splicing in a few lessons, and they quickly acquire many details of seafaring life and phraseology.

THE BOARD OF TRADE—continued.

To encourage rapid progress, those who are Londoners and have done well in the week's work are given leave for the week-end to go home. This leave has been much appreciated, and the lads return keener than ever.

Catering receives special attention, a good, wholesome diet being supplied. A room is provided for reading, writing and games after the evening meal, and once a week the lads have an enjoyable concert. There is a religious service on Sunday mornings.

With regard to this new Sea Training School at Gravesend, the enquiry is frequently made, "How can you with your intensive training attempt to turn out a ready-made sailor in six or eight weeks?" The answer is that competent authorities considered it might be done, and practice has since shown that it can be done, and is being done, at this school. With proper premises and facilities, efficient and sufficient instructors and enthusiastic pupils the difficulties are much lessened.

As a result of its first three months' work the school shipped 126 youths on a variety of vessels ranging from the finest mail steamers to coasting colliers. The reports from the Captains and Officers of these vessels have been most encouraging, and testify to the efficiency of the training, special mention being made that the lads are good helmsmen. Several of the leading lines are showing great interest in the scheme, and it is hoped that an increasing number of vessels will take these trained youths on board. There were 180 lads at the school at the beginning of the year, and the intensive training ensures a constant supply every week ready to ship.

Further particulars, including details of the outfit required for lads joining the school and the wages such lads may earn at sea when trained at the school for a few weeks, may be obtained from the Sea School Selection Officer, Board of Trade Offices, 79, Mark Lane, E.C.3.

UNIFORMS FOR THE MERCANTILE MARINE.

The Board of Trade have made arrangements with the Admiralty for the inclusion of uniforms for officers of the Mercantile Marine in the Admiralty scheme of control for the provision of Naval officers' uniforms. Tailors and outfitters on the Admiralty list will be notified by the Admiralty that Mercantile Marine officers' uniforms may be made from the P.N. cloths at the prices already arranged for Naval officers' uniforms which are made from P.N. cloths. Tailors and outfitters who have regularly made Mercantile Marine officers' uniforms in the past, but who are not already on the Admiralty list and who desire to be included, should make application to the Director of Contracts, Admiralty, London, S.W.1, direct.

MERCHANT SHIPPING (CONVENTION) ACT, 1914.

The coming into operation of the Merchant Shipping Convention Act, 1914, has been postponed until the 1st July, 1919.

REPAIR OF ENEMY MERCHANT SHIPS.

The Board of Trade have issued a general licence, dated 3rd January, to all persons in the United Kingdom to negotiate regarding the repair and fitting out of, and to repair and fit out, any enemy merchant ship which is under the control of the Allied Maritime Transport Council.

RESUMPTION OF TRADE WITH PALESTINE AND SYRIA.

Among the Government Notices will be found the text of a General Licence, under the Trading with the Enemy Proclamations, which has been issued by the Board of Trade, authorising the resumption of trade with Palestine and Syria as far north as a line from Alexandretta to Aleppo inclusive and as far east as the Hejaz Railway inclusive. An Order of Council (the

THE BOARD OF TRADE—continued.

text of which will be found under "Government Notices") has at the same time been issued, the effect of which will be to allow the exportation to these territories without a War Trade Department licence of all articles other than those on lists "A" and "B" of prohibited exports, i.e., of all articles except those whose exportation to all destinations or to all foreign destinations requires a licence. It will still be necessary for an import licence to be obtained from the Department of Import Restrictions before arrangements are made to import from the territories any goods covered by the Prohibition of Import Proclamations.

The General Licence, whilst permitting the resumption of trade, does not remove certain existing restrictions in respect of the payment of pre-war debts and the return of property held or managed before the war for persons within the territories. Moreover, permission must be obtained from the Treasury before money can be remitted to the territories for any of the purposes covered by Defence of the Realm Regulation 41D, namely, making or subscribing to any loan, subscribing to any issue of capital, purchasing any stock, shares or other securities, or any property other than merchandise, if the securities or property are not in the United Kingdom, or purchasing any foreign currency to be held with a view to appreciation in value or as an investment.

THE NON-FERROUS METAL INDUSTRY ACT, 1918.**TWENTY-FIFTH LIST OF LICENCES.**

We give below the twenty-fifth list of firms, etc., licensed under this Act. Previous lists appeared in our issues of 30th May, 13th and 30th June, 4th, 11th, 18th and 25th July, 8th, 15th, 22nd and 29th August, 5th, 19th and 26th September, 3rd, 10th and 17th October, and 7th, 14th, 21st and 28th November, 12th and 19th December, and 2nd January.

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

Alliance Casting Co., The, of 41, Harford St., Birmingham.
 Arnhold, Karberg and Co., of 14, Fenchurch Street, E.C. 3.
 Barker, C. F., trading as C. F. Barker and Sons, of Bronze Foundry, Newdigate Road, Coventry.
 Beer and Co., A., of 71, Whitworth, Manchester.
 Betts and Co., Ltd., of 1, Wharf Road, City Road, N. 1.
 Boulton, W., of Maskell Street, Manchester.
 Browhead Copper Mining Co., Ltd., The, of Crookhaven, Co. Cork, Ireland.
 Bryan, F., trading as The British Ribbonite Lead Co., of 122, Newgate Street, E.C. 1.
 Builders' Supply Co. (Essex), Ltd., The, of 6 and 7, St. John's Square, Cardiff.
 Dentsch and Brenner, Ltd., of 44, Harford St., Birmingham.
 Douglas and Co., Ltd., B., of Vicar Lane, Chesterfield.
 Ford, J., of Old Sea Lock, Cardiff.
 Foucar and Co., Ltd., of 28, Basinghall Street, E.C., and 34, Great St. Helens, E.C.
 Gabriel, C. E. P., trading as Gabriel and Co., of 4 and 5, A. B. Row, Birmingham.
 Geevor Tin Mines, Ltd., of 4, London Wall Buildings, E.C.
 Godfrey and Co., Reginald, of Bush Lane House, Cannon Street, E.C. 4.
 Grace Brothers and Co., Ltd., of 144, Leadenhall Street, E.C. 3.
 Hartcliffe, Lee and Malkin, Ltd., of St. Simon Street, Salford, Manchester.
 Hartley, T., trading as J. Hartley and Co., of Croft Street, Bury, Lancashire.
 Holmes, Joe, of 193, Wapping Road, Bradford.
 Isaacs, M., of 70, Victoria Street, Westminster, S.W. 1.
 James, W. A., trading as W. A. James and Co., of Royal Metal Exchange, Swansea.
 Lagos Stores, Ltd., The, of West Africa House, 25, Water Street, Liverpool.
 Lazaras and Sons, L., of 10-11, Lime Street, E.C. 3.
 Metallurgical Co., Ltd., The, of 82, Victoria Street, S.W. 1.
 Millin and Son, H., of 114, Rocky Lane, Nechells, Birmingham.

THE BOARD OF TRADE—continued.

Moss and Gamble Bros., Ltd., of Franklin Works, Russell Street, Sheffield.
 Pegler Bros. and Co. (Doncaster), Ltd., of Belmont Works, Doncaster.
 Roberts, J., trading as J. Roberts and Co., of Gladstone Street, Cleckheaton, Yorks.
 Stephenson and Co., J., of 46, Queen Victoria Street, E.C. 4.
 Stringer and Sons, S., of Taylor Street East, Accrington.
 Tavener, H. L., trading as Tavener and Co., of West India House, 96-98, Leadenhall Street, E.C. 3.
 Wood, H., of 9 and 10, Thurlow Place, Bethnal Green, E. 2.
 Wray, T. B., of Albion Foundry, Albion Street, Castleford.
 Wright, Ltd., Henry, of Market Place Buildings, High Street, Sheffield.

DEPARTMENT OF OVERSEAS TRADE.

COMPETITION FOR NEW ZEALAND TRADE IN MOTOR VEHICLES AND MACHINERY.

The officer in charge of H.M. Trade Commissioner's Office at Wellington, New Zealand emphasises in a cable to the Department of Overseas Trade the necessity for United Kingdom manufacturers and exporters to cultivate the New Zealand market, particularly in regard to motor vehicles and machinery. This can be done at present by the distribution of catalogues and, where possible, of samples. There are no restrictions on the despatch of catalogues to New Zealand, and the regulations governing the export of samples are given on pp. 624, etc., of the "Journal" of 14th November. In general, samples can be exported without licence under declarations, and the regulations referred to contain a list of goods, samples of which cannot be exported without a licence.

Strenuous efforts are being made by American interests to extend their trade in New Zealand in motor vehicles and machinery.

PERMANENT EXHIBITION OF SAMPLES AT NICE.

A permanent exhibition of samples, to be called "L'Exposition d'Echantillons de la Côte d'Azur," is being organised at Nice, under the patronage of local French Chambers of Commerce and certain local Commercial Associations, including the Mayors of Nice, Cannes, Meaton, Grasse, Antibes, Beaulieu, Villefranche-sur-Mer, and St. Martin-Vésubie. The exhibition will be open, admission free, to the general public, and is intended to supply French buyers who were dependent on goods of enemy origin before the war with ready access to suppliers from the Allied countries. It will contain a large hall for samples, and will have available catalogues, price lists and directories, with the object of placing local merchants in touch with manufacturers or their representatives.

Before the war the Riviera, being a rich and important market—especially in luxury articles—received considerable attention from Germany. In addition to German commercial travellers, who generally stayed through the winter seasons, German interests frequently opened offices for the sale of articles in local demand, and thus secured important orders from large local firms and hotels.

United Kingdom firms wishing to be represented in the exhibition should communicate with the "Secrétariat de L'Exposition d'Echantillons, 27, Rue Bis-carra, Nice.

NEW PAPER PULP COMPANY IN ALGIERS.

Further information with regard to the formation of a new paper pulp company in Algiers, which was announced on p. 612 of the "Journal" of 14th November, has been received by the Department of Overseas Trade from the British Consul-General. The company is called the "Société des Celluloses de l'Afrique du Nord," with a capital of three million francs, and it has been formed by the Société Nord Africain d'Etudes, 23bis, Boulevard Carnot. The object of the company is to manufacture paper pulp, paper, cardboard, etc.,

THE BOARD OF TRADE—continued.

from esparto grass and other raw materials obtainable in the Colony. A copy of the statutes of the company, also a copy of the statutes of the Société Nord Africain, may be consulted by interested British firms at the Department of Overseas Trade (Development and Intelligence).

The company hope to be in a position to export towards the middle of the present year. It will be registered under French law, and the Consul-General is informed that practically all the persons who have so far applied for shares are of French nationality.

NEED FOR WELL-EDUCATED COMMERCIAL TRAVELLERS IN SWEDEN.

In Sweden the wholesale as well as retail trade is, according to the general manager of a large departmental store in Stockholm, in the hands of well-educated men. It is therefore necessary, he informs the British Consul in that city, for United Kingdom firms to send only educated men as their representatives to the country. At present, he states, the few commercial travellers who visit Sweden from the United Kingdom are not, as a general rule, well educated.

It is therefore considered essential that only the best English commercial travellers should be sent to the country to extend business relations.

Germany has always been careful to select good men in this direction, and has no doubt acted wisely in doing so.

The American traveller who visits Sweden is, it is stated, nearly always a well-read man. There are many Americans in the country at present, and nearly all are capable, not only of transacting business, but of procuring the information they need for future development.

SUGGESTED MARKET FOR AEROPLANES IN CHILE.

There is a prospect, according to H.M. Consul-General at Valparaiso, of aeroplanes being used in Chile between the ports and the nitrate oficinas. At present the journey from a nitrate oficina to the port of loading involves a number of days to officials, while by air it could be accomplished in a number of hours.

It is stated that an application has already been made by a firm in Valparaiso for a British aeroplane agency.

UNITED KINGDOM TOUR OF H.M. TRADE COMMISSIONER IN NEW ZEALAND.

With reference to the notice that appeared in the "Journal" on 26th December regarding the arrangements made for Mr. Dalton, H.M. Trade Commissioner in New Zealand, to visit certain commercial and industrial centres for the purpose of interviewing firms and visiting works, arrangements have now been made for Mr. Dalton to attend at the Chambers of Commerce at the following centres on the undermentioned dates:

Wolverhampton, 3rd to 5th February.

Walsall, 6th February.

Coventry, 7th to 12th February.

Mr. Dalton will continue his tour to other centres and will proceed, in the order named, to Lancashire and Ireland, and return to London via Scotland, Yorkshire, Derby, Leicester and Northampton.

SHIPPING INTELLIGENCE SERVICE.

The Department of Overseas Trade is prepared, on application, to furnish available information regarding cargo steamship services trading between the United Kingdom and all ports of the world, and between overseas ports.

Information regarding British forwarding agencies from the United Kingdom to all parts of the world may also be obtained.

Applicants for information are requested to state their requirements clearly, particularly indicating the ports or districts between which cargo is to be carried.

Special Articles.

MESOPOTAMIA.

I.—RESOURCES AND POSSIBILITIES.

No country, not even Egypt, has made a deeper mark in the history of the ancient world than Mesopotamia. For thousands of years it was the seat of the Assyrian and Babylonian Empires. To the bountiful resources of nature its peoples added those of art and science, and the country during the centuries waxed not only in material wealth and military power but also in culture. The ancient glory of Mesopotamia has passed, but the glamour remains. There remain also the natural resources of the country, which for nearly seven centuries have been blighted by the Turk. The dry levels of Mesopotamia, of great intrinsic fertility, need artificial irrigation to preserve them from drought; the lower levels need protection against being swamped by the overflow from the rivers. Under Turkish rule both irrigation and river conservancy were neglected, and tract after tract of once fertile land fell out of cultivation. To-day a very small proportion of the land is tilled. Great permanent swamps have been formed; wide deposits of salt from the flood waters have spoiled land for cultivation although it has not remained permanently flooded, and hundreds of thousands of once irrigated acres have relapsed into desert. While much of that which made Mesopotamia a cradle of civilisation has gone for ever, much still remains and is capable of restoration and development. We will endeavour to give as briefly and accurately as we can a sketch of the country in sufficient detail to indicate its resources and future possibilities.

NATURE OF THE COUNTRY.

Mesopotamia, as its name implies, is a land of rivers. Its natural wealth rests chiefly in the rich alluvial soil of the Delta between the Tigris and Euphrates, and the future of the country depends mainly upon the proper utilisation of the rivers for irrigation and navigation. There are really three rivers, for at Kurma, in Lower Mesopotamia (Iraq), the Tigris and Euphrates meet and together form the Shatt-el-Arab, which flows thence into the Persian Gulf 107 miles away. From Mosul, in the northern hills, to Kurma by the route of the Tigris is 723 miles; from Meskeneh to Kurma by the Euphrates is 1,002 miles. German writers have estimated the rich alluvial soil between and about these rivers at from 25 to 60 million acres in extent. These are probably over-estimates, but whatever may be revealed by modern surveys of the extent of the possible area of cultivation, it is known that a very small percentage is at present under tillage and that from 2½ to 5 million acres are continually under floods. Little is known of the mineral resources of this country. There has been some working of deposits by more or less primitive methods, but, except in a few districts, no scientific examination of mineral fields. The statements made concerning the existence of oil are chiefly based upon considerations of geological structure supported by some surface indications of oil and bitumen. We will give some particulars later of the surface oil workings on the Tigris and Euphrates. There may be sources of wealth in Mesopotamia yet to be explored and worked, but not enough is at present known of minerals to compete in interest with agriculture in a survey of the country's possibilities.

AGRICULTURE.

The alluvial soil of Lower Mesopotamia (South of Bagdad) is very rich and of great potential fertility.

SPECIAL ARTICLES—continued.

Though the greater part of it is now waste, only irrigation and tillage are needed to bring out its inherent qualities. But in order to realise fully the agricultural wealth of Mesopotamia internal communication by river, road and railway require development. Improved external communication by sea will also be necessary, for since the construction of the Suez Canal Mesopotamia has become, to some extent, side-tracked. Until quite recently no attempt had been made to develop internal communications. Turkey was apathetic, and as late as 1912 failed even to appreciate the importance of an adequate steamer service on the Tigris. The Bagdad Railway was a German enterprise and a part of their scheme of commercial penetration.

Cultivators of the soil have been discouraged by almost every kind of insecurity. The Government was not strong enough to put down feuds between tribes or to stop incursions of Kurds from the hills. The vagaries of the rivers, unchecked by engineers, made swamps or deserts of tracts which had once been fertile. Land tenure was as uncertain as the land itself; not even sheikhs had a greater security than was offered by a five years' lease. Land taxes were farmed out, and extortion in their collection followed as a matter of course. "Publicani" in the East have always been proverbial oppressors. Labour was scarce and uncertain, and credit facilities hardly existed. Under discouragements such as these population and cultivation dwindled together.

METHODS OF CULTIVATION.

Mesopotamia is a land of two harvests for arable crops. Wheat, barley and beans are sown in the autumn or winter and harvested in April and May; rice, peas and maize are sown during the spring floods and harvested between August and September. Cultivation is primitive; the soil is so fertile that tickled with a hoe it laughs with a harvest, and the Arab, whose needs are small, is content with the simplest tillage. The ground is lightly ploughed and never properly broken up. Seed is often put into the ground much later than it should be. This is because the population is in many places insufficient to look after both the spring and autumn crops. The wheat and barley growers migrate to the rice tracts after the spring harvest and do no ploughing for the spring harvest until the work of gathering and threshing the rice crop has been finished.

SYSTEMS OF IRRIGATION.

The growth of all the crops is dependent upon irrigation, of which three systems are in operation. The oldest system in the world—water lifted in buckets—is still used for date gardens, though not to any extent for arable lands. In Lower Mesopotamia and also higher up the rivers, especially along the Euphrates, the water lifts may be seen at work. Secondly there is irrigation by channels along which the fresh water is forced when it meets the rising tide in the Shatt-el-Arab. Thirdly, there is irrigation by canals. The banks of the rivers and canals have been raised by silt brought down during floods, so that there is a gradual slope down from the banks to the low levels permanently under swamp. The high ground is dry except at full flood; the middle slopes can usually get water during most of the spring and summer; the lower land is always wet. So, in the absence of a scientific distribution of flood water, we get a gradation from the land which is almost always dry to that which is usually irrigated, and thence to the always wet. The gradation in arable crops is from wheat and barley on the higher levels, to millet and maize on the middle slopes, and to rice on the wetter levels just above the swamps.

SPECIAL ARTICLES—continued.

AGRICULTURAL PRODUCTS.

The most important agricultural product in Mesopotamia is the date palm. Dates form the chief article of food and usually provide the most valuable export. Mesopotamia is stated to produce 80 per cent. of the world's total supply of dates. The export averages 60,000 tons annually and is capable of considerable expansion. The date palm requires a liberal supply of water, and is, therefore, principally cultivated near the rivers in Lower Mesopotamia. The groves of trees have to be protected against flooding by dykes. Along the Shatt-el-Arab for a hundred miles the date palms form a continuous belt from half a mile to two miles wide between the river and the desert. The date gardens are irrigated through trenches along which fresh water is driven when the tide rises. The immediate neighbourhood of Basra is probably the finest date-growing region which exists anywhere. Though the Shatt-el-Arab Belt is of the greater importance, there are on the Tigris at and below Bagdad eleven miles of date groves. The Mesopotamian date is not equal in quality to that grown in Egypt and Algeria, but could be improved by the introduction of varieties from these countries. The average crop may be put at some 91,000 tons. The date forms not only the staple food of the Arab, it provides also fodder for cattle, and from it is made a native spirit called araq.

Next to the date palm in importance is the rice plant, which is principally grown in Lower Mesopotamia on the levels of the river slopes where they trend downwards towards the swamps. Though primarily grown for home consumption, there is an increasing surplus for export; at Basra in 1912 67,000 tons were loaded. It is not possible to say what the total production is, but the yield is heavy and the rice traders are by far the wealthiest cultivators in Mesopotamia. The popularity of rice makes it a formidable rival of wheat and barley and would make it a rival of cotton.

Though wheat and barley cannot compete with the rice and the date palm in Lower Mesopotamia (though barley is grown there), they are the chief crops in the northern parts of the country; difficulties of transport have hitherto restricted export. In the northern vilayets of Mosul and Diarbekr large fertile valleys lie among the desert wastes, and the rainfall is generally sufficient to enable the cultivators to dispense with irrigation. When adequate means of transport are made available there should be a profitable extension of these cereals. The barley is generally of excellent quality, and if properly cleaned would command the best prices in the world's markets. The wheat is red and hard.

Millet, maize and sesame are grown in Lower Mesopotamia, but almost entirely for home consumption.

In fruits there is a wide range, corresponding with the range of climate between Basra in the south and Diarbekr in the north. Diarbekr is famous for its vines and preserved fruits, and as far north as Mosul the orange can be grown. Olives, figs, melons, pomegranates, apricots and apples are common everywhere. Southward towards Bagdad on the Tigris, and on the Euphrates from Anah to Hit, the orange orchards are universal. Below Bagdad the date palm predominates. Before the war vegetables—of which a wide range is grown—were not regarded seriously as agricultural products. During the British occupation they have been cultivated with very satisfactory results in Lower Mesopotamia.

In ancient days Mesopotamia abounded in trees; now, except for the fruit trees and stunted oaks in the north, the land is almost bare. Reafforestation

SPECIAL ARTICLES—continued.

is of much importance both as a means of assisting the control of floods and of increasing the humidity of the soil.

LIVE STOCK.

Camels, horses, cattle, sheep, goats and donkeys are the principal or sole source of wealth of many of the inhabitants of Mesopotamia. The camel is a characteristic feature of the dry, uncultivated plains. Good breeds of Arab horses are to be found both in northern and southern Mesopotamia. Sheep are bred in immense numbers in most parts. Cattle are used for ploughing, irrigation and general draught work in the better-watered grazing grounds near the rivers, and buffaloes are kept in great numbers in the marsh country. Donkeys are very common in Irak, but there is little breeding of mules. Fodder is the great live-stock difficulty, as the grain dries up in the hot weather, and it is this difficulty of providing fodder which is at the root of the nomadic habits of the Arab. They are obliged to go after it with their flocks and herds to the foot hills. Lucerne grows well where it has been cultivated, and, being a leguminous crop, would benefit the soil by fixing atmospheric nitrogen. If Mesopotamia is to become the home of a settled population, the provision of fodder in hot weather, especially for sheep, must receive early attention.

POPULATION.

Agricultural development in Mesopotamia depends upon irrigation, transport and population—above all, on population. For whatever means foreign experience may suggest to solve the problems of irrigation and transport, they cannot be carried to fruition without adequate labour. Neither can the lands extended by irrigation be made to bear crops. The present native population is small. In the vilayets of Basra and Bagdad—practically the whole of Lower Mesopotamia—there are not more than 1,500,000 people, and probably not more than a million. This means a population of less than ten persons to the square mile, obviously an altogether insufficient number for any far-reaching scheme of agricultural development. The Arabs form the vast majority.

THE ARAB AS WORKER.

Insecurity of tenure and a very fertile soil have in the past tended to make the Arab content to live from hand to mouth—he could scratch a livelihood without much effort—and to do no more work than he was obliged. But during the years immediately before the war, when the Hindia Barrage was being constructed by Sir John Jackson's firm, and especially during the British occupation, the Arab has come well out of the tests applied to him. When he could see any use for labour he was willing to work intelligently and efficiently.

THE SUPPLY OF LABOUR.

The contractors for the Hindia Barrage found that labour was plentiful and good except during seed-time, harvest and irrigation periods. The British military authorities have had a similar experience. There is a surplus of labour beyond that required for tilling the soil, and there is no unwillingness on the part of Arabs to work if demands show consideration for the habits of the people and for the requirements of agriculture at different seasons. The Arab is described as cheerful, uncomplaining and willing, and as easy to handle if properly treated. He must have someone set over him to whom he can explain his troubles in his own language, and the most scrupulous attention must be paid to tribal distinctions. The Arab is a good worker, but there is not enough of him for large developments of the country. The problems which would arise from an influx of immigrants who were not Arabs do not fall within the scope of these articles.

SPECIAL ARTICLES—continued.

WAR TRADE OF JAPAN.

PROSPERITY OF COMMERCE AND INDUSTRY.

During the four years of war it has been inevitable that the economic market of Japan should have been greatly affected both directly and in consequence of the economic dislocation in Europe and America. A brief review of the leading features of Japan's foreign trade, taken from a statement issued by the Department of Finance, is therefore of great interest.

THE PRE-WAR PERIOD.

At the time preceding the outbreak of the War, Japan had been suffering from the effect of the extraordinary reaction that followed the boom in all spheres of activity after the close of the Russo-Japanese War. The trade and industries were then depressed, the balance of trade continued adverse, and the supply of money was always short. Both the Government and people had to follow a negative and retiring policy in financial and economic affairs. All ideas of launching new undertakings were repressed as much as possible, the flotation of new foreign loans was discontinued, the primary motive actuating them being how to give relief to the straitened condition of national finance and to lighten the burdens of the people.

OUTBREAK OF THE WAR.

When the War broke out in July, 1914, and Japan entered it on the Allied side, sending an expedition to capture Tsingtao, the effect exerted on her economic market was on the whole unfavourable. The agitation that had come over the money market in Europe adversely affected that of Japan, and her bankers were persuaded to adopt the policy of contraction. Then the increased peril at sea, with abnormal rise of insurance rates and the disturbance of foreign exchanges, combined to retard the movement of foreign trade. The slump of the staple export, raw silk, was a hard blow.

Fortunately the influence of all unfavourable factors on the market was not so serious, chiefly owing to the fact that Japan is remote from the theatre of war, and also to the restrictive financial policy pursued for many years before by the Government. It was not long before a favourable turn set in for her market.

FINANCIAL YEAR, 1915-16.

The economic market that was temporarily hit by the War was followed in 1915-16 by an unprecedented activity brought about by various causes. In the first place, the arrival of large orders for munitions from the Allies, and similar orders from the Far Eastern countries and the South Seas, where the imports from Germany and other belligerents had ceased to come, enlivened the export trade. In the second place, the scarcity of freight space throughout the world, and the abnormal rise of charterage of Japanese ships engaged in foreign trade, brought in its train a phenomenal activity in shipbuilding. Again, the sudden shortage of imported chemico-industrial productions, and of machines and machinery, and the abnormal advance of their quotation, stimulated the launching of enterprises in those lines at home. Lastly, the marked accumulation of funds owing to the combined result of the first two factors facilitated the expansion of trade and industries.

SITUATION IN 1917.

Though in the early part of the year the general economic tendency continued brisk, the enlargement of the sphere of the War soon began to work adversely against the export trade both from external and internal causes, the former from the restriction placed on the consumption of various articles and the ban enforced on both imports and exports. Then in Japan, as counter measures actuated by those special arrangements abroad, shipment of a number of articles was

SPECIAL ARTICLES—continued.

prohibited while the money market, currency, prices and freight market were placed under control. In the latter half of 1917 the economic market entered a new era, a predominant note of which was one of restraint in various directions, quite a striking contrast compared with the two preceding years. It was fortunate that the accumulated funds that accrued from the previous period of prosperity saved the market from sustaining any heavy blow, and enabled it to pass the year on the whole satisfactorily.

FOREIGN TRADE.

During the period from August, 1914, to the end of 1917 Japan's exports totalled Yen 3,798,000,000 (£389,019,769), against imports amounting to Yen 2,623,000,000 (£268,667,418), leaving balance of Yen 1,175,000,000 (£120,352,351) in favour of exports.

This is a striking contrast compared with the period prior to 1913 inclusive, when the total volume of trade rarely reached the level of Yen 700,000,000 (£71,699,273), while as to balance of trade it was only in a single year that the Customs returns recorded excess of exports over imports during the ten years indicated, the balance being the other way for the other nine years.

This enormous shipment to foreign markets was due, classified by kind of commodities, to large orders for grain, cotton goods, raw silk, copper, steamships and miscellaneous goods—orders being specially heavy from America, India, China and the South Seas.

The thriving foreign trade, coupled with similar activity in the shipping business, yielded a large credit for Japan in her international account, this credit amounting to Yen 751,000,000 (£76,923,077), of which Yen 328,000,000 (£33,596,231) was brought home.

DEVELOPMENT OF DOMESTIC INDUSTRIES.

The prosperity of foreign trade and the non-arrival of certain class of imports supplied a strong encouragement to the rise of industrial enterprises. Of agriculture, it is sufficient to say that its productions, favoured by seasonable weather, continued to record a steady increase; but it was in the two spheres of industrial activity, manufacture and mining, that a notable progress was noticed, especially in the former, due to sudden rise of manifold industries in which chemical, mineral, textile, smelting and shipbuilding industries were most conspicuous. The activity in mining enterprise was most marked in increased output, the total value in 1917 being doubled compared with 1914. Among the productions, silver, copper, coal, iron and sulphur contributed most to the total.

The total amount of investment in the creation of the new and the expansion of old undertakings reached Yen 2,200,000,000 (£225,310,572), the greater part of which went to manufacturing industries and mining.

MONEY MARKET.

The sudden appearance of sundry enterprises, and the issue of no small amount of Government securities, did not particularly affect the money market; on the contrary, it remained easy in consequence of a large inflow of money from abroad.

Thus the total volume of banking deposits rose from Yen 2,000,000,000 (£204,855,065) at the time of the outbreak of the War to Yen 4,800,000,000 (£491,652,156) as existing at the end of 1917. The rate of interest fell throughout the country. In Tokio the ruling rate that stood at first at 8.3 per cent. a year fell to 5.9 at the end of 1915, to rise slightly afterwards, that is, 6.2 per cent. or thereabouts, at which level the market has long remained stationary.

Another sign of the times was a marked rise of the average quotation of stocks; what did not exceed Yen 48 at first stood at Yen 104 at the end of 1917. This state of affairs was also reflected on the market price of commodities, it rising about 70 per cent. in 1917. The volume of currency swelled high, and the Bank of Japan's convertible notes in circulation rose

SPECIAL ARTICLES—continued.

at the end of 1917 to the record figure of Yen 830,000,000 (£85,014,852), as against Yen 330,000,000 (£33,801,086) at the end of July, 1914.

FINANCIAL SUPPORT TO THE ALLIES.

The favourable development on the whole of Japan's economic market has relieved the country on the one hand from the financial pressure that was weighing upon it in consequence of the Russo-Japan War, and on the other apparently has paved the way for her industrial and trade expansion in future. When it is remembered that the progress was mainly due to causes suddenly coming from without, there is greater need for solidifying its foundation internally.

Japan's endeavours to promote the common cause of the Allies is not confined to operations on land and sea. The extension of financial support to them, so far as circumstances admitted, also claimed earnest attention on her part. In this respect Japan generally followed the plan of devoting the money obtained from abroad since the War to contribute to the support of the Allies, either by subscribing for the loans issued by them or by purchasing their bonds.

The total amount invested in all those securities reached at the end of 1917 Yen 1,159,000,000 (£118,713,510), consisting of Yen 530,000,000 (£54,286,592) in British Government bonds, Yen 254,000,000 (£26,016,593) in Russian Government bonds, and Yen 155,000,000 (£15,876,268) in French Government bonds, to which is to be added Yen 220,000,000 (£22,534,057), representing Japanese foreign loan bonds and company debentures redeemed in foreign market.

In short, Japan devoted nearly the whole of her favourable trade balance from the beginning of the War to extending financial support to the Allies.

FINANCIAL AND ECONOMIC CONDITIONS COMPARED WITH THOSE BEFORE THE WAR.

	At the end of July, 1918.	At the end of July, 1914.	Increase (+) Decrease (-)	
	Yen	Yen.		Per Cent.
Amount of National				
Debts outstanding ..	2,529,655,353	2,570,162,513	0	
Coins in Circulation ..	208,597,967	179,118,470	16.5	
Bank of Japan—				
Note issued ..	770,219,218	331,035,396	132.7	
Specie Reserve ..	645,076,810	216,503,420	198.0	
Tokio Associated Banks				
Capitals paid up ..	202,853,178	143,305,525	41.6	
Deposits ..	1,663,420,716	439,100,300	278.8	
Loans and Discounts	1,407,012,702	490,08,937	187.0	
Osaka Associated Banks				
Capitals paid up ..	94,564,935	50,287,625	88.0	
Deposits ..	1,081,043,714	233,319,450	263.3	
Loans and Discounts	991,607,451	319,900,556	210.0	
Deposits in the Post				
Office Savings Bank	491,670,000	201,687,725	143.8	
	One year ending 31st July, 1918.	One year ending 31st July, 1914.		
Government Railway				
Gross Earnings ..	187,663,022	110,511,876	69.8	
Foreign Trade				
Value of Commodities				
exported ..	1,793,568,077	663,465,643	170.3	
Value of Commodities				
imported ..	1,483,860,923	696,485,258	113.1	
Total ..	3,277,555,000	1,359,950,901	141.0	
Excess of Exports ..	309,581,154	—	—	
Excess of Imports ..	—	33,019,615	—	
Amount of Bills cleared				
in the Clearing Houses				
throughout the				
country ..	42,670,739,448	10,725,202,142	279.0	
	For July, 1918.	For July, 1914.		
Average Price of Securities				
(in Tokio) ..	109.10	47.965	127.5	
Average Index Number				
of Prices of Commodities				
(in Tokio) ..	25.627	12.575	103.8	

* Excluding the amount of certain Special Exchequer Notes.

SPECIAL ARTICLES—continued.

LAND FOR PUBLIC USE.

PROPOSED NEW METHODS OF VALUATION.

The Ministry of Reconstruction have now issued the Second Report of the Committee upon the Acquisition and Valuation of Land for Public Purposes, of which Mr. Leslie Scott, K.C., M.P., is Chairman. Their First Report, which was issued last January, recommended measures for cheapening, shortening and simplifying procedure for obtaining compulsory powers for the acquisition of land, a procedure so cumbersome as to involve a delay of many months, and costs of anything from £500 upwards. In their Second Report the Committee devote attention to a suitable system for the valuation of land compulsorily acquired for public purposes.

PRESENT LEGAL POSITION.

The existing legal provision for dealing with such valuation is based upon the Lands Clauses Acts, the chief of which dates back to 1845. The experience of two generations has shown, the Report states, that this Act and the Amending Acts require re-consideration in order to give effect to the requirements of the community of to-day. The Lands Clauses Acts are out of date, and should be replaced by a fresh Code.

NEW CRITERION OF VALUE TO OWNER.

Sum paid for property taken for public purposes have for many years past been frequently excessive. For this result it is impossible to assign any one cause, and the Committee deal in detail with several. Their main recommendation is that the basis of "value to the owner," which has hitherto been adopted as the criterion for such valuation under various judicial decisions (though no such criterion was, in fact, specifically laid down by the Lands Clauses Acts of 1845) should be replaced by a general standard of value to be paid to the owner, which is defined as "the market value as between a willing buyer and a willing seller." In addition to this value the owner would be entitled, under the Committee's proposals, to payment for consequential injury or any actual loss to him involved in the taking away of his land.

The Committee do not think that the fact of his land being acquired under compulsory powers for the public benefit should entitle an owner to additional compensation on that ground alone. They urge therefore that the conventional allowances for compulsory purchase (which in England and Wales is normally 10 per cent., and which in the case of agricultural land in Scotland has, in practice, resulted in giving 45 years' purchase of the gross annual value, representing in recent years nearly 100 per cent. allowance) should be discontinued.

There are certain other corollaries following from the adoption of this standard of "market value" which are important, and for which special provision is made in the Report. On the vexed question of what is known as "special adaptability," the Committee recommend that an owner should not be entitled to any increased value for his land which arises solely from the adaptability of the land in question for a purpose to which it could be applied only under statutory powers. The adoption of this principle would put an end to the payment of excessive values for land required for reservoir sites, railways and other undertakings of a public nature which can only be initiated if statutory powers are granted by Parliament for the purpose. The high valuations which have handicapped such improvements in the past have been based largely upon hypothetical competition between different promoters requiring the land for the same purpose. Only one of these promoters could, in fact, have obtained the necessary statutory powers; the competition, therefore, upon which such values are based is imaginary.

The Committee further recommend that no enlargement of market value shall be taken into account which arises from the use of the land in a manner contrary to sanitary or other laws and regulations (as illustrated in the provisions of the Housing of the Working Classes Acts, 1890, in regard to premises in an unhealthy area, where such premises are overcrowded, insanitary or unfit for human habitation).

NOTICE TO TREAT.

The Committee made various recommendations with a view to giving promoters greater freedom in acquiring and disposing of properties required for their undertaking. They shall not be compelled to purchase any interest in land which is not required for the purpose of their undertaking, and they shall be able to specify in the "notice to treat" the date on which such notice is to take effect in regard to any

SPECIAL ARTICLES—continued.

interests which they do require. They shall have power to take part only of a property whenever they think fit, and to acquire rights of access or other easements over or under land whenever such rights or easements will, of themselves, be sufficient for the purpose of their undertaking. They shall further be entitled (on payment of all proper costs and compensation) to withdraw their "notice to treat" within two months of the delivery of the claim (which should clearly set forth all items in respect of which compensation is demanded) or within such other date as may be directed. Finally, the promoters shall be entitled to use land free from any existing restrictions on its use (subject to payment of compensation to any persons actually damaged by the breach of such restrictions) and able, subject only to certain limitations in very special cases to hold and dispose of surplus lands not required for the purpose of their undertaking.

ASSESSMENT OF COMPENSATION

An important question to which the Committee devote special attention is that of the constitution of the Tribunal for assessing compensation. They are unanimous in recommending that assessment by juries and by Justices of the Peace and stipendiary magistrates under the existing Acts should be abolished, and that the system under which two arbitrators and an umpire are appointed to adjudicate in such cases should be discontinued. Parties should, of course, be left free to appoint a single arbitrator on their own account if they agree upon the arbitrator to be selected; but if they do not so agree, the Committee recommend that the Tribunal should consist of a single arbitrator appointed by the Sanctioning Authority (the establishment of which was recommended in the first Report) from a panel consisting of eminent surveyors and other experts. At the same time, they provide that surveyors appointed to this panel, if they continue in private practice, should give an undertaking that so long as they remain on the panel they will not give evidence in disputed cases on behalf of either party. It is hoped that by this provision it will be possible to obtain the services of eminent and practical surveyors upon the panel from which arbitrators are to be selected, but that the anomaly will be avoided of having the same men appearing alternatively as judges and as advocates from day to day in the same class of case.

While the Committee think that a single arbitrator so selected will usually constitute the most suitable form of Tribunal for assessment of compensation, they provide that if either party desires it, the Sanctioning Authority shall have discretion to order a larger and special Tribunal. They further recommend that the Sanctioning Authority shall be empowered to make rules as to the procedure to be observed by the Assessment Tribunal, but that the Assessment Tribunal in order to possess powers of penalising obstructive action, shall have absolute discretion over costs. Taxation returns in the possession of the Inland Revenue Valuation Department should be produced on request by the Assessment Tribunal. Appeals should be allowed to the High Court of Justice on any disputed question of law.

"BETTERMENT."

Another vexed question is that of what is known as "Betterment." The Committee think that the general principle of "betterment" and "corsement" (for which latter term in their Report they substitute the term "injurious affection" in a larger sense than that in which it is normally recognised under existing law) should generally be correlative. They attach much importance to an extended application of the principle of "betterment" on the ground that if persons whose property has been enhanced in value by public improvements are made to contribute to the cost of such improvements by means of a "betterment charge," there will be more inducement for promoters to undertake schemes (likely to develop the resources of the nation and the amenities of national life) which are in danger of being hampered or indefinitely postponed for financial reasons under the conditions likely to obtain after the war. In normal cases the Committee limit the percentage of such enhanced value which is to be contributed by the owner to 50 per cent.

Where the State is the promoter, the State should retain the whole of the "betterment charge." Where a local authority is the promoter, the Sanctioning Authority should decide whether the whole of the "betterment charge" should be retained by that authority or whether some proportion should be paid to the State. In the case of a private promoter, his share in the "betterment charge" should be limited to the actual cost of construction of the works involved in his undertaking.

One of the main difficulties encountered in the past in applying the principle of "betterment" in a way which can practically assist the promotion of valuable public undertakings has been the heavy weight of costs involved in procuring the two sets of valuations of the land in its

SPECIAL ARTICLES—continued.

original condition, and of the same land after its enhancement by the public works in question. For this purpose the Committee recommend an extended utilisation of machinery already in existence in the Inland Revenue Valuation Department

"INJURIOUS AFFECTION."

As to compensation for "injurious affection," the Committee recommend that its operations should be confined to (a) damage arising directly from the taking of the land, such as severance or disturbance of occupation, in respect of which compensation should be paid in the general course; and (b) damage arising directly from the construction or use of the works in question, as to which damage the Sanctioning Authority should exercise discretion in determining whether compensation should be allowed or not, according to the circumstances of the case.

"RECOUPMENT."

The Committee are not generally in favour of a system of what is known as "recoupment" (i.e., the giving of powers to take land beyond what is necessary for the authorised works, in order to secure the enhanced value created by such works). They think that any general application of such a principle might have undesirable results in a tendency to speculation in land by public authorities, and that the general purpose of securing to the public some proportion of the enhanced value of land arising from enterprises of a public nature would be better served by the imposition of a "betterment charge" under the conditions which they recommend. But they think that acquisition of land for purposes of "recoupment" should be permitted in the case of State improvements, or where the land is required for the reinstatement of displaced interests or for the efficient development in the future of a specific undertaking.

They conclude by saying that a simple, quick and economical system for the acquisition of land is essential alike to the development of the nation's resources and to sound progress, and that a new code established by legislation to replace that embodied in the Land Clauses Acts should involve a more complete acceptance of the principle of expropriation in the public interest than that which has prevailed in the past.

Notes on Trade.

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

NEW ORLEANS AS A DISTRIBUTING CENTRE.

Considerable developments are taking place in improving the position of New Orleans as a distributing centre to Chicago, the Middle West and the Mississippi Valley. On p. 724 of the "Journal" of 19th December an account was given of the new barge services between St. Louis and New Orleans. According to a message received from the British Embassy at Washington a Japanese steamship company has begun a regular service between Japan and New Orleans, as this route enables advantage to be taken of lower railroad freight rates than those which obtain from Seattle, San Francisco and Atlantic ports. The first steamer in this new service arrived at New Orleans with a cargo of coffee from Brazil, and on its return trip through the Panama Canal carried a cargo of machinery and merchandise for Japan.

The competition between the new barge service on the Mississippi and the railroads must lead to still lower railway rates in this quarter for goods intended for distribution from New Orleans, while New Orleans itself is in a favourable position for capturing a good deal of the Ocean trade through the Panama Canal with Central and South America.

LEAGUE OF TRADERS IN THE MISSISSIPPI VALLEY.

With the entire Mississippi Valley turned into a seaport by the Government's line of barges that will give Memphis, St. Louis, Chicago and other "inland" points lighter connection, so to speak, with ocean ton-

NOTES ON TRADE—continued.

nage, plans have been launched for a league of the valley cities to make a conquest of the Latin-American trade after the war, according to New Orleans advices.

Mexico, Central and South America, it is argued, are natural affinities of New Orleans, both socially and economically. New Orleans is essentially a Latin city in feeling. Commercially it is a thousand or so miles nearer than any other port that could handle the business, and it is the natural confluence of the commerce of 41 per cent. of the United States.

While the form of organisation and the methods of operation have not yet been worked out, the general plan has already been approved by many of the larger producing and jobbing centres, including St. Louis, Chicago and Peoria.

The purpose of the league would not be to stifle competition between individual firms, but rather to furnish facilities for trade expansion, such as the names of merchants in foreign countries, credit ratings, methods of doing business, conditions in the various foreign markets and similar practical services.

Another important part of the work would be keeping foreign markets informed of conditions in the valley, its advantages and opportunities.

AMERICAN ENGINEERS AND FRENCH RECONSTRUCTION.

The arrival in Paris of a mission of American engineers to confer with French engineers on the subject of reconstruction is announced in the French Press. This mission includes delegates of the United States Society of Civil Engineers, the Society of Mechanical Engineers, the Electrical Institute and the Institute of Mines.

The mission is to visit the liberated areas, and will work in five sections, as under:—

- 1) Port and canal improvements.
- 2) Reconstruction of roads.
- 3) Agriculture.
- 4) Utilisation of water-power resources.
- 5) Technical education.

MORE SOLE LEATHER RELEASED.

The Army Council have made an Order amending the Sole Leather (Conditions of Sale) Orders, 1917 and 1918. Under the new Order English sole leather previously controlled, except certain classes still required for military purposes, is released for civilian purposes, and the quantity of such leather which may be purchased by any individual from one source, in seven consecutive days, is extended from 500 to 1,000 bends, and from five to ten tons of shoulders and bellies. The Order is given in our "Government Notices" Section.

BOOKS AND PAPERS SENT ABROAD.

The War Office announce that, as the result of the cancellation of the Orders made by the Army Council under Defence of the Realm Regulations 24 and 24B, it is no longer necessary to obtain a permit from the War Office (Chief Postal Censor) or from the Admiralty for the despatch abroad of printed or illustrated matter (including photographs and other pictorial representations), blue prints, or stamps.

Such matter, while still subject to censorship, can now be transmitted abroad in the ordinary way.

The text of the Orders referred to is given in our "Government Notices" Section in order that the effect of the change may be understood.

DIAMOND EXPORT COMMITTEE.

The Director of the War Trade Department announces that the meetings heretofore held by the Diamond Export Committee have now been discontinued.

NOTES ON TRADE—continued.**SWISS LEGATION IN LONDON.**

The Swiss Minister in London announces that the Swiss Legation in London has been removed to 32, Queen Anne Street, W.1, where all communications should in future be addressed. (Telephone, Mayfair 6182.)

AMERICAN PROPOSAL FOR TRADE WITH SERBIA.

The United States Consul at Salonika is suggesting that there should be organised in America, preferably in New York or some Atlantic coast city, an American-Serbian Association for the importation of American goods into Serbia, with a minimum capital stock of 1,000,000 dols. This organisation should be in touch with a similar one in Serbia or at Salonika. (Salonika, he states, will in all probability have a free Customs zone, as provided for by the Greek Government before the war.) This Serbian society should be directly under Government control.

The American-Serbian Association could, if it chose, carry on business directly at Salonika, and then in Serbia through an agency which could be entrusted to one of the Association's representatives. This body would be prepared to provide a substantial sum to guarantee American capitalists against loss.

Before the Balkan Wars there were annually turned over, within the boundaries of Old Serbia, goods to the amount of 900,000 metric tons. After the addition of New Serbia in 1913 this quantity was doubled in the short space of time between the end of the second Balkan War and the beginning of the World War. If, as a result of the present struggle, a great Jugo-Slav confederation, including Serbia, is formed, there will be a vast market opened up.

SEA TRANSPORT DIFFICULTIES.

The Shipping Controller is most anxious that the tonnage released from war service, which is now being re-allocated, should be so distributed as to meet all essential requirements. He would be obliged, therefore, if shippers, whether exporters or importers, experiencing any lack of sea transport facilities, or any difficulty due to port congestion, or other cause affecting the free movement of goods oversea, would communicate with him, giving full particulars. Communications should be addressed: Ministry of Shipping, St. James's Park, London, and the cover marked "Shipping Difficulties."

NEW SOUTH WALES TRADE COMMISSIONER FOR LONDON.

The New South Wales Government have appointed a Trade Commissioner to represent the commercial interests of the State in London. The officer appointed is Lieut.-Colonel Hurley, who was formerly in charge temporarily of the Commercial Department of the New South Wales Agent-General's Office in London.

Addressing recently a representative gathering of members of the Sydney Chamber of Commerce and the New South Wales Chamber of Manufactures, Colonel Hurley invited producers to avail themselves of his services, and suggested that, in the event of their desiring to enter the United Kingdom market, they should consign to him trial freights, which he would guarantee to dispose of, and for which he would render the consignors account sales accompanied by draft in payment and a report on the prospects of further business.

Imperial and Foreign Trade.

BRITISH EMPIRE.

UNITED KINGDOM.

FOREIGN TRADE IN DECEMBER.

The imports into the United Kingdom in December were valued at £677,000 less than in November, but exceeded by £31,422,000 the total for December, 1917. The exports were £4,742,000 less than in the previous month, the decrease being due to a falling off of nearly £5,000,000 in the value of produce and manufactures of the United Kingdom exported, while the exports of foreign and colonial merchandise increased by nearly £200,000. As compared with December, 1917, there was an increase of £1,075,000.

The following table gives, under the three principal classes of articles, the values for December and November, 1918, and for the twelve months ended 31st December, 1918, 1917, and 1913. The figures showing the values of the principal classes of articles imported and exported in December, 1918 and 1917, and in each of the years ended 31st December, 1918 and 1917, are given in the table under Commercial Returns.

	Food, Drink, and Tobacco.	Raw Materials and Articles mainly unmanufactured.	Articles wholly or mainly manufactured.	Total, including miscellaneous and unclassified.
	Thousand £	Thousand £	Thousand £	Thousand £
December, 1918—				
Imports	49,088	45,256	20,904	116,192
Exports—				
British	1,079	4,281	31,547	38,262
Foreign & Colonial	987	1,141	984	3,112
November, 1918—				
Imports	43,201	49,017	23,629	116,869
Exports—				
British	1,180	4,112	34,737	43,219
Foreign & Colonial	692	1,208	1,071	3,971
Twelve Months ended 31st December :—				
1918—				
Imports	572,660	458,859	280,164	1,310,339
Exports—				
British	12,067	60,838	403,721	498,473
Foreign & Colonial	4,030	13,425	12,585	30,040
1917—				
Imports	454,711	384,798	218,505	1,064,165
Exports—				
British	16,332	67,162	423,614	527,080
Foreign & Colonial	7,439	48,374	18,794	74,607
1913—				
Imports	290,202	281,822	193,002	765,026
Exports—				
British	32,588	69,505	411,368	525,245
Foreign & Colonial	15,943	64,068	26,458	106,474

The increase of £5,887,000 in the value of the imports of food, drink, and tobacco compared with the total for November, was due to increased importations of non-dutiable feeds; grain and flour being greater in value by £675,000, meat by £4,373,000, and other non-dutiable food and drink by £3,236,000. These amounts were off-set by a decrease of £2,001,000 in the value of dutiable food and drink and of £366,000 in the value of tobacco.

The imports in December of raw materials and articles mainly unmanufactured were valued at £3,731,000 less than in the previous month. Groups in this class which show an increase compared with November are: wood and timber, hides and undressed skins, paper-making materials, and miscellaneous articles. The principal decreases were in raw cotton (£1,244,000), raw wool (£1,852,000), other textile materials (£1,440,000), and in oil seeds, nuts, oils, fats, etc. (£1,798,000). Hides and undressed skins show an increase of £384,000, paper-making materials of £443,000, and the miscellaneous group of £591,000, of which amount £371,000 is accounted for by greater importations of rubber.

The imports of articles wholly or mainly manufactured were less in value in December than in November by £2,725,000, the most important decreases being in metals, other than iron and steel, and manufactures thereof (£2,245,000), and in chemicals, drugs, dyes and colours (£958,000). The value of aeroplanes, airships, balloons, and parts thereof imported shows an increase of £848,000, and that of dextrine and farina or potato flour, an increase of £186,000.

The exports of produce and manufactures of the United Kingdom show a decrease of £548,000 in the value of coal, and of £3,190,000 in that of articles wholly or mainly manufactured, when compared with the figures for November.

IMPERIAL AND FOREIGN TRADE—continued.

Cotton yarns and fabrics were less in value by £1,480,000, wool yarns and fabrics by £750,000, and apparel by £272,000. The value of the exports of foreign and colonial produce was greater in December than in any other month of 1918, except January, March and May, but the total for the year (£30,956,000) was less than 45 per cent. of the total for 1917, and less than 32 per cent. of the total for 1916.

Comparing the totals for the years 1918 and 1917, an increase of £293,895,000 is shown in the value of the net imports, and a decrease of £28,607,000 in the value of exports of produce and manufactures of the United Kingdom. The imports of food, drink and tobacco account for 46 per cent. of the increased value of the imports, raw materials and articles mainly unmanufactured for 29 per cent. of the increased value, and articles wholly or mainly manufactured for 24 per cent. Of the decreased value of British and Irish exports, 15 per cent. was in food, drink and tobacco, 22 per cent. in raw materials and articles mainly unmanufactured, and 69 per cent. in articles wholly or mainly manufactured. There was an increase in the value of miscellaneous and unclassified articles. It should be noted that the figures for the first half of 1917 are exclusive, as stated below, of certain Government-owned goods.

The accounts for December contain supplementary tables showing separately for each month from July, 1917, to December, 1918, so far as the particulars are available, the value of classes of merchandise, except food, which at the time of importation were known to be the property of H.M. Government or the Governments of the Allies in the case of imports. In the case of exports these supplementary accounts show the value of Government-owned goods exported, except goods for the use of H.M. forces on active service. Such imports and exports were not included in the Accounts of Trade prior to July, 1917. The imports of these goods were valued at £106,681,000 in the six months, July to December, 1917, and at £249,963,000 in the twelve months, January to December, 1918. The exports of Government-owned goods, the produce and manufacture of the United Kingdom, amounted to £9,490,000 in the second half of 1917, and to £18,566,000 in the year 1918. The re-exports were valued at £327,000 and £2,960,000 respectively in the two periods.

The net tonnage of the shipping entered with cargoes in the Foreign Trade in December was 1,984,560, this total being less by 1.1 per cent. than in November, and greater by 16.7 per cent. than in December, 1917. The shipping cleared with cargoes in the Foreign Trade in December totalled 1,936,215 net tons, or over 2.4 per cent. in excess of the clearances in November, and 2.1 per cent. less than in December, 1917. In the year 1918 the tonnage entered was slightly less than in 1917, while the clearances were less by 12.8 per cent.

BRITISH INDIA.

COMMERCIAL AND INDUSTRIAL INTELLIGENCE.

The Indian Trade Commissioner in London has received the following cable, dated 2nd January, from the Director-General of Commercial Intelligence, Calcutta:—

SEASON.

Slight beneficial rains in parts of Bombay. Local rain in parts Punjab, North-West Frontier Province, Sind and Rajputana. Light rains also in South-East of Madras.

MARKETS.

Bombay Cotton Market continues irregular. Fully good Broach, April-May delivery, quoted 638 rupees a candy.

RAILWAYS.

Railway reconnaissance surveys have been sanctioned. Parbatipur Bonarpara Chord 50 miles (East Bengal Railway). Nowgong to Chhatarpur 17 miles, and branches thence to Rajgarh, 24 miles, and to Bijwar, 20 miles. This is probably the Great Indian Peninsular Railway.

INDUSTRIES.

Government of Bombay sanctioned formation of Pioneer Magnesia Company for making trial on large commercial scale for manufacture of Magnesium Chloride and Sulphate from Bitterns found at the Pritchard Salt Works, Kharaghoda (Runnofcutch).

LEGISLATION.

A telegram has been received from the Government of India stating that a notification issued on the 28th December transferring to Indian prohibition list "D" Capsicum, Pepper, Corundum, including Rubies and Sapphires, Carbonade, Carborundum, Garnets, Casings, Diamonds, Hemp, Rubber and Silk Nails, and Waste.

IMPERIAL AND FOREIGN TRADE—continued.

AUSTRALIA.

IMPORTS FROM JAPAN.

An interesting return, illustrating the trade of Japan with Australia, was recently laid upon the table of the Commonwealth Parliament.

According to the figures, the importation of Japanese goods and products into Australia has increased enormously since the outbreak of the war. The value of dutiable articles during the year ended 30th June, 1917, exceeded those of the fiscal year of 1913 by no less than £2,259,405.

For comparative purposes the following schedule is given:

	1913.	1916-17.
	£	£
Ale, spirits, and beverages	2,347	2,844
Tobacco and manufactures	7	94
Sugar	765	127,197
Agricultural products and groceries	35,324	69,994
Textiles, tents and tents, manufactures thereof	415,280	1,480,779
Metals and machinery	7,163	197,884
Oils, paints and varnishes	32,547	82,041
Earthenware, cement, china, glass and stone	29,553	263,200
Drugs and chemicals	776	66,127
Wood, wicker and cane	34,580	181,751
Jewellery and fancy goods	19,140	123,039
Hides, leather and rubber	1,556	34,345
Paper and stationery	9,029	51,341
Vehicles		9,728
Musical instruments	549	5,545
Miscellaneous	54,831	198,077
Total	634,566	2,893,971

NEW ZEALAND.

GOVERNMENT'S ECONOMIC PROGRAMME.

Forthcoming legislation in New Zealand was outlined in the Governor-General's speech at the opening of Parliament on 24th October.

According to a "Gazette Extraordinary" of that date, he stated that measures are to be submitted for granting power to local bodies to initiate hydro-electric schemes for their respective districts; for the prevention of the aggregation of land; for the prevention of the acquisition of land in New Zealand by persons of enemy origin; for the better protection of soldiers, and their wives and dependants; for the prevention of traffic in military decorations, and the unauthorised use of badges assigned to soldiers' associations; for the necessary preservation of New Zealand forests; and for the limitation of export of timber.

POSITION OF THE BANKS.

The returns of the six banks carrying on operations in New Zealand are now available for the quarter ended 30th September last, and these reveal a continuance of a good supply of money available. Assets have increased in the last year by four millions, and liabilities by two millions, but the totals are not as high as they were on 30th June.

Since the outbreak of war there has been a marked expansion in banking business, the totals being approximately doubled in the last six years. The big prices ruling for all classes of goods, both imports and exports, and the necessity for financing accumulations of produce awaiting shipment are the main factors in causing this increase.

The position on 30th September showed a surplus of deposits over advances of £5,366,510, as compared with £4,476,763 in the previous quarter, and £7,292,186 on 30th September, 1917.

The advance of three millions on meat in store at the end of June is considered to be the cause of the improvement, and the further advance on meat made in October is expected to reveal further improvement in the December figures.

The main items in the banks' returns compare with the figures of the previous quarter as under:—

	September, 1918.	June, 1918.
	£	£
Deposits, free	21,616,245	22,110,629
Deposits, fixed	14,123,961	13,929,459
Deposits, Government	9,012,555	14,061,273
Note circulation	6,235,344	6,154,496
Discounts	1,242,938	1,244,494
Advances	30,403,696	31,563,316
Coin and bullion	8,146,798	8,089,639
Government securities	6,075,083	5,661,037

The share of the various banks in deposits and advances were:—

IMPERIAL AND FOREIGN TRADE—continued.

	Deposits. £	Advances. £
Bank of New Zealand	17,228,230	15,327,165
Union Bank	4,479,263	4,186,438
Bank of New South Wales	4,815,387	3,678,214
Bank of Australasia	3,582,927	3,546,431
National Bank	5,256,981	4,534,171
Commercial Bank	407,418	374,171

EGYPT.

FOREIGN TRADE IN SEPTEMBER.

The Official Egyptian Customs Returns show a considerable increase both in imports and exports in September as compared with the values for the same month in 1917.

IMPORTS.		EXPORTS.	
1917	£2,760,223	1917	£2,036,643
1918	£4,150,541	1918	£3,401,881
Increase	£1,390,321	Increase	£1,365,238

From the 1st January to 30th September the total value of Imports into Egypt reached £22,312,566 for 1917, as compared with £37,812,974 for 1918, representing an increase of £15,500,408. Exports for the same periods were £27,637,531 in 1917, and £35,962,109 in 1918, representing an increase of £8,324,578.

Of the total Imports from 1st January to 30th September, £22,326,921 came from the United Kingdom, and of the total Exports, £24,248,428 went to the United Kingdom.

PRINCIPAL IMPORTS.

Cotton piece-goods.—Value £1,610,076, of which £1,517,706 from United Kingdom, £70,441 from Italy, and £18,439 from Japan.

Ready-made clothes and hosiery.—Value £210,950, of which £69,622 from United Kingdom, £111,343 from Japan (hosiery).

Woollen textiles.—Value £75,098, of which £71,549 from United Kingdom.

Coal.—Value £258,516, almost all from United Kingdom.

Iron and Steel.—Value £202,107, of which £185,779 from United Kingdom.

Sugar.—Value £245,027, chiefly from Mauritius.

Olive oil.—Value £59,263, from Greece.

Matches.—Value £29,887, of which £25,738 from Japan.

Glassware.—Value £41,069, of which £29,253 from Japan.

Silks.—Value £115,136, from France, Japan and China.

Tobacco.—Value £276,710, principally from Greece, and some from Japan and China.

PRINCIPAL EXPORTS.

Cotton and cotton seed.—Value £3,018,244, almost all to the United Kingdom. The balance of exports is made up chiefly of hides, rice, gum, wool and cigarettes.

PRODUCTION AND CONSUMPTION OF ALCOHOLIC LIQUORS.

(From the Commercial Secretary, Ministry of Finance.)

CAIRO.

Brandy is made in Egypt from imported wines, which before the war were chiefly from Turkey, but which now come from Cyprus and Spain. This brandy is partly consumed locally and partly exported. The amount exported has risen from 12,398 kilogs. of a value of £E407 in 1914, to 30,305 kilogs. of a value of £E1,744 in 1917. The brandy industry is of many years' standing, but has recently increased considerably.

Whisky has also been recently manufactured in Egypt, the malt required being made on the distillery premises.

Run is made locally either from molasses or directly from the sugar cane. Gin has recently been made on a small scale.

The value of Brandy, Whisky, and other potable spirits imported into Egypt has doubled since 1914, the total imports amounting to £E261,558 in 1917.

PLAIN SPIRITS.

Plain spirits are made on a very large scale from sugar cane residues. There is no tax or Government control of any sort. The trade is practically in the hands of one man. Recently, the distiller in agreement with the Government, has denatured that part of his production which is sold by retail for domestic purposes. This was done principally in order to prevent the smaller retailers from diluting the spirit before sale. The amount of plain spirits made in 1916-17 was about 8,500,000 kilogs., of which a large part was a specially refined quality for export.

Beer is made in Egypt in considerable quantities. It is a light beer of the Pilsener type made from malt and hops by the "bottom" method of fermentation. In 1914 the value

IMPERIAL AND FOREIGN TRADE—continued.

of the beer imported into Egypt was £E67,709, which rose in 1916 to £E481,610, but fell again to £E119,572 in 1917.

Before the war a large amount of light beer came from Austria and Germany.

EUROPE.

ITALY.

IMPORTS OF AGRICULTURAL MACHINERY.

The following, according to information supplied to H.M. Commercial Counsellor in Rome, were the annual importations of agricultural machinery into Italy before the war, and the share of the chief competing manufacturing countries.

PLOUGHS.

Three-fifths from Germany, one-fifth from Belgium, and the rest from America and France, out of a total of 35,000.

Mechanically drawn ploughs were imported entirely from England. Those employing the wire rope system were constructed in Italy.

Motor ploughs were unknown in Italy before the war; those imported since have been almost entirely of American construction.

MACHINES FOR SOWING.

Importations numbered about 1,000; two-thirds from Germany, one-third from the United States of America.

THRASHING MACHINES.

Four-fifths of these were imported from England.

HARVESTERS.

About 1,200 reapers and binders, 6,000 mowers, and 2,000 other harvesting machines, with the exception of a few from England, France and Germany, were almost exclusively imported from the United States of America.

MACHINES FOR VITICULTURE.

These were almost all imported from France. A considerable quantity of ploughs were manufactured in Italy, perhaps 10 per cent. of the number imported.

MOTOR MACHINES.

Motor machines of original designs were being made, in no way inferior, though more costly, than those of foreign design.

HARROWS.

Except the disc type and spring cultivators (*coltivatori a valle*) which were imported, the former from America, the latter from France, harrows in use were almost all made in Italy.

Italy produced about one-tenth of the number of portable engines and thrashing machines imported.

It is thought that, as has indeed been shown during the war, there are no difficulties of a technical character in the way of native construction of all this class of machinery.

AGRICULTURE AND AGRICULTURAL
IMPLEMENTS IN SOUTHERN
ITALY.

(From the British Consul.)

NAPLES.

The war has demonstrated to what an extent Italy depends on imported cereals, and the scarcity of tonnage now and for some time to come should act as an incentive to increase their sowings of grain. This has been recognised by the Italian Government, which is offering premiums for the 1919 crop. For wheat, maize, oats, and barley gathered in Sicily, Sardinia, Calabria, Basilicata, Puglia, Campania, Molise, and the Abruzzi, the State will pay for every quintal bought or requisitioned a premium of lire 11.25 for soft or semi-hard grain, lire 12.75 for hard; lire 8.40 for maize and oats, and lire 9.30 for barley and rye.

It will be noticed that with the sole exception of Sardinia all the districts quoted belong to Southern Italy, and it may, therefore, be expected that within the next few years a large increase in grain-growing will take place in those districts.

ANTIQUATED METHODS.

The South is backward in many ways. In the grain-growing districts the soil is tilled almost entirely by wooden ploughs drawn by oxen, not unlike those used in Roman times. American tractors have, to a certain extent, been introduced since the beginning of the war, and the two companies (at Turin and Milan) have turned out sample tractors which have undergone a series of successful trials.

IMPERIAL AND FOREIGN TRADE—continued.

These tractors, however, have not yet been introduced into the southern provinces. All over Italy the great difficulty operating against tractors is the absence of skilled labour and the lack of fuel. The former difficulty may be diminished as regards the South by the fact that thousands of Southern Italians have returned from the United States for military service who are already familiar with up-to-date agricultural methods, and if they can be induced to stay in their own country and do agricultural work, they will be of great use in working agricultural machinery.

CAPITAL AND BETTER COMMUNICATIONS WANTED.

It must, however, be admitted that at present there are very good reasons for the present conditions of agriculture in the southern provinces to remain as they are for some time to come. Principal among these is the lack of capital, and the absence of communications (not only railways, but roads), and the consequent impossibility of disposing of crops in any way but locally; and in Campania and the Basilicata there are large tracts of fertile country which will probably never become developed, or even inhabited, until such facilities exist. This applies in a less degree to Calabria, where the mountainous character of the country also makes communications difficult. But in that province there are possibilities of development found in no other part of southern Italy. If the hydro-electric scheme for constructing the reservoirs in the Sila highlands is carried out, it will not only supply electric energy to certain districts, but also water for irrigating extensive agricultural districts.

LAND TENURE.

As for the usual sizes of farms in Southern Italy, it is very difficult to give any guide because great variety exists. The land formerly was, and is still to a large extent, owned by proprietors of large estates, who let it out to peasants and receive the rent whenever the principal crop is sold. But a transformation is taking place in the ownership of land. Southern labourers who have emigrated to America often return with sufficient fortunes to buy up the land, which their relations, sometimes for generations past, have tilled as labourers. Under Italian law property on the death of its owner is equally divided among the children, so that there is a tendency for landed properties to become divided up and consequently reduced in size. Smallholders find it more profitable to exploit their land intensively, by turning it into market gardens rather than farms in the English sense, the vegetables being planted under vines, olives, peach and plum trees, which protect them against the sun and form an additional source of income. Being of a frugal and easily contented nature, and the soil being extraordinarily fertile, there is nothing to induce them to launch forth into new systems of agriculture which would necessitate agricultural machinery. As to the large landowners, they are too often absentees from their estates, and as long as their tenants continue to pay the rent regularly, take too little interest in them to wish to adopt any new systems.

IMPLEMENTS.

The implements used for the wine-growing and fruit-raising alluded to are, like those used for grain-growing, very primitive. The soil of Naples and district being, for the greater part, of a light friable nature, two-pronged hoes are used, besides the wooden plough mentioned above, for breaking up the ground. Moreover, the Italian peasant being unaccustomed to wearing boots whilst working, never uses a spade. Hay and grain are mown by sickles. The vines are pruned entirely by small hand clippers, Italian law prohibiting the use of long-bladed knives. The vines are sprayed throughout the spring and early summer with a solution of sulphate of copper carried in zinc cans strapped over the backs of the sprayers.

NEW STANDARDS FOR ELECTRICAL
MACHINERY.

An Italian standard for electrical machinery is to supersede German standards in the requirements of Government Departments in Italy.

By Decree No. 752 of 3rd November, published in the "Gazzetta Ufficiale" of 12th December, all electrical machinery ordered by Italian Government Departments shall conform to the standard regulations (for testing) compiled by the Italian Electro-technical Association in 1916, of which a copy is annexed to the Decree.

Before the war German (A.E.G.) standards were in universal use in Italy. This Decree crowns the efforts of the Italian Electro-technical Association to bring Italian standards into application in Italy.

The text of the Decree, and a copy of the standard regulations (in Italian) can be consulted at the Department of Overseas Trade (Development and Intelligence), 73, Basinghall Street, E.C. 2.

IMPERIAL AND FOREIGN TRADE—continued.

UNITED STATES OF AMERICA.

THE NATIONAL CITY BANK OF NEW YORK.

The National City Bank of New York has supplied the "Federal Reserve Bulletin" with an account of its operations, according to which the institution had, in August last, 17 foreign banking houses established under the Federal Reserve Law (14 of them in Latin-America, 2 in Russia, and 1 in Italy). An additional branch is about to be established in Sagua La Grande, Cuba.

For a full practical understanding of the foreign banking extension of the bank, it is necessary also to consider the branches throughout the world of the International Banking Corporation, which the National City Bank of New York controls through ownership of practically all its stock, and which is so closely affiliated with the National City Bank of New York as to enable the two organisations to work closely as parts of one banking system.

The latter has 15 branches in the Orient covering India, China, Japan, the Philippines, and the Malay Archipelago, also a branch in London, and a number of branches and sub-branches in Central America and the West Indies. The combined system has 40 banking houses abroad.

ORGANISATION.

The organisation of the National City Bank of New York is, according to this account, unique in international banking. There is no other great international bank in the world with quite the same unity, or homogeneity, of organisation. This gives it distinct advantages in the effectiveness of its service of banking, and general commercial assistance to its American and foreign customers.

The foreign banking houses of the institution are American branch banks abroad by reason of their authorisation under the Federal law of the United States. At the same time they are full functional local banks by reason of authorisation under the laws of the countries where they are located.

They are all thus complete local banks, but in another aspect they are to be regarded as banking houses of one great international bank; the personnel and the policies of their organisation are purposely kept homogeneous; they are not permitted to grow apart in the spirit of separateness they would necessarily feel if they were just foreign subsidiaries of some American institution. The National City Bank of New York, in New York, or the National City Bank of New York in Buenos Aires, or the banking house wherever located, is in reality all the one bank.

COMMERCIAL INTELLIGENCE AND CREDIT INFORMATION.

The National City Bank of New York has devoted considerable energy in foreign bank extension to the very important work of systematising credit information regarding foreign merchants, etc., not alone as to its foreign customers, but including all the important firms in the countries where it has branches. In several foreign countries where it was not usual to obtain definite statistical facts about a firm, such as are included in balance sheets, the bank has been able to overcome the prejudice and get the information along with other pertinent commercial data of great benefit to its customers.

In connection with all its own banking houses abroad, and as far as is practicable with the International Banking Corporation branches, the Bank conducts a foreign trade service for the international benefit of its customers and of business in general. By a special organisation it has systematised the exchange and distribution of commercial information, some of it obtained as a by-product of regular banking, other secured by special commercial representatives employed especially for this business. It consists not only of systematically handled credit and general information about firms individually, of reports of business conditions in general, and the current situation in specific lines of trade, but also includes a large volume of mail between the New York banking house and the banking houses abroad relating to definite negotiations for goods and for business connections.

The publication of the Argentine Bank figures in the August issue of the "Federal Reserve Bulletin" shows the deposits of the Buenos Aires banking house to have been 20,420,300 dols. (roughly converted from Argentine pesos) in April. At the beginning of 1918 the banking house at Rio de Janeiro stood sixth among the leading native and foreign banks there, having resources of 136,860 contos—the other bank totals being: Banco do Brazil, 556,855 contos; London and Brazilian Bank, 192,444 contos; Banco Mercantil do Rio de Janeiro, 158,627 contos; Banco Nacional Ultramarino, 138,957 contos; London and River Plate Bank, 137,447 contos. The banking houses at Sao Paulo, Brazil, stood fifth among the institutions of Sao Paulo and Santos. There is also a National City Banking House at Santos. If official figures were available they would show a standing of similar importance for the Habana, Montevideo, and Genoa banking

IMPERIAL AND FOREIGN TRADE—continued.

houses. The more recent foreign banking houses have not of course, obtained this rank.

PROMOTING "DOLLAR EXCHANGE."

The bank has adhered to the policy of accumulating at its banking houses in different parts of the world sufficient stocks of commercial bills to enable it to have on hand at all these points, at all times, "dollar exchange" ready for sale to United States exporters and importers. In this way the bank is able to sell exchange at a much steadier rate, from day to day, than if it had to go into the local markets and bid for bills on a hand-to-mouth basis, in order to meet the demands of its customers. This fact enables the bank to contribute with good effect to the building up of "dollar credits" in general international banking.

ARGENTINA.

The banking house of the National City Bank of New York at Buenos Aires was the first branch of the bank opened abroad under the Federal Reserve law. It was established in November, 1911. Through this banking house the National City Bank conducted the negotiations and the financing of the Argentine loan of 1915, and subsequent international public financing that signalled the expansion of the United States banking into the larger phases of its foreign activities.

Through the medium of this house, also, the Industrial Union of Argentina conducted its notable negotiations in 1916 with United States exporters for the settlement of a large number of claims due to commercial misunderstandings in the flood of early war-time business between the United States of America and Argentina. It has a large clientele of leading Argentine business houses as customers. The growth of its business has made advisable a notable extension of the city bank system in Argentina in the near future.

BRAZIL.

The representation of the National City Bank of New York in Brazil consists of the large banking house in Rio de Janeiro, and the banking houses at Sao Paulo, Santos, and Bahia, the Rio branch having a position of authority in the group, but all doing the complete business with full power to negotiate and close business transactions, which is characteristic of the international organisation. Through these banking houses the bank has assumed an important position in the local business situation in this part of Brazil, and has established cordial relations with governmental authorities and agencies. Current developments forecast an early extension of the Brazilian group into other important commercial territories of the great Republic. Subject to war-time governmental control and the limitations of law, the Brazilian banking houses of the Bank are doing a large volume of banking in all its phases, both in the commercial financing of business between the United States and Brazil, and of Brazil's own commerce with all the world.

URUGUAY.

The banking house at Montevideo occupies a position of influence among the foreign institutions there, and is working closely with the local banking system of the country in conducting every phase of financing which the National City Bank of New York handles. When the heavy balance of merchandise trade between the River Plate markets, and the United States and the nations associated with her in the war, turned exchange rates adversely to the dollar, this banking house and the Buenos Aires banking house went as far as they could go as purely commercial banks—through liberal credit transactions accorded to American business—in overcoming the disadvantages of the situation; and since the United States Government, through the establishment of large credits on Government account in the Government institutions there, and the negotiation of arrangements by which the Federal Reserve Banks sell, exchange, and settle the accounts of American importers without the necessity of shipping gold, the banking houses of the National City Bank of New York have continued to co-operate in a way to assist in this important service to American commerce.

CHILE.

In 1916 the banking house at Valparaiso, Chile, was organised and opened for business. The bank has since opened a subordinate office in Santiago, which will later probably carry on full functional banking locally, although it does now practically a full business by means of the Valparaiso facilities. The Chilean representation has not only conducted full local and international activities, but the Valparaiso banking house did pioneer work in the present very important monetary development in Chile, importing gold for the purpose.

THE WEST INDIES AND CARIBBEAN.

In 1916 the Bank concluded an arrangement with the stockholders of the Bank of Habana, by which that important bank in Cuba was absorbed in the National City Bank of New York and became the Habana banking house of the latter. A subordinate, but completely equipped and full-functioned, banking house was a little later opened at Santiago de Cuba.

IMPERIAL AND FOREIGN TRADE—continued.

In 1918 a new banking house was organised and began business at San Juan, Porto Rico. For over a year a banking house has been fully organised and doing the National City Bank's full banking activities at Caracas, Venezuela. The importance of this region of Latin-America to United States business interests is fully recognised, and a further extension of its facilities is expected, working closely with the spread of branches of the International Banking Corporation there.

ITALY.

The banking house of the Bank in Genoa, Italy, is an imposing structure in that important centre of Italian industry and commerce. Its sphere of banking influence extends all through the Lombardy region, where it has made important connections with clients whose business will include activities in Italo-American after-war commerce. Effective relationships with the local Italian banking system have also been built up. This banking house has been one of the mediums for a large volume of exchange transactions conducted by the bank between Italy and America since the early stages of the war.

SCANDINAVIA.

The National City Bank of New York has an office at Copenhagen, where its Scandinavian representative makes his headquarters. Through the medium of the strongest banks of Norway, Sweden, and Denmark, with which the bank has particularly close relationships, this office, it is stated, is able to offer American business interests complete banking facilities connected with exchange, establishment of foreign credits, also commercial information for purposes of promotion of commerce.

RUSSIA.

A branch of the National City Bank of New York was opened in Petrograd on 15th January, 1917, and up to the time of the Bolshevik revolution in November, 1917, this branch was doing a large and rapidly increasing business with both Americans and Russians. A branch of the bank was opened in Moscow on 26th November, but due to the unsettled political situation, its opening was of a very informal character.

In the latter part of December, 1917, all private banks in Russia were seized by the Soviet Government, who thereupon instituted a process of nationalising the banks by making them branches of the State Bank. The branches of the National City Bank of New York were excepted from this process, but at the same time their business was greatly restricted, being put under the general banking regulations of the other Russian banks.

[NOTE.—The account of the operations of the International Banking Corporation will appear in the "Journal" next week.]

EXPERIMENTS IN BRINING OF FISH.

Some very significant results have been obtained in experiments in the salting of fish, states a Report issued by the United States Bureau of Fisheries. It has been found that the impurities in salt, even in small quantities, have a marked effect on the process of salting, and on the quality of the salted product.

Pure sodium chloride (salt) penetrates the fish very rapidly and completely. The penetration is retarded by adding a small amount of calcium chloride to the pure brine, to an even greater extent by magnesium chloride, and most of all by sodium sulphate. These salts of calcium and magnesium are common, almost constant impurities in salt, and it can be readily seen how they may adversely affect the proper preservation of fish in hot weather, by prolonging the time of penetration of the fish by the brine.

These impurities have also a marked influence on the quality of the product. Pure salt produced a soft fish with a brownish or greyish meat; small quantities of the impurities produce a much firmer salt fish. Magnesium chloride, which keeps the skin bright, is the most effective. Small amounts of calcium chloride make the fish hard, larger amounts make the skin loose and slimy. Calcium chloride makes the flesh white, and magnesium chloride also is particularly effective in this regard.

Once the effects of these impurities are known, it may be possible to bring about not only a more rapid and complete brining of fish, but to produce at will a salt fish possessing almost any desired degree of hardness.

LATIN AMERICA.

ARGENTINE REPUBLIC.

DIRECTION OF IMPORT TRADE DURING THE WAR.

The Director of National Statistics in the Argentine Republic has issued the following table of the value and direction of the country's import trade since 1913. The

IMPERIAL AND FOREIGN TRADE—continued.

countries are arranged according to the value of their exports to Argentina in 1917:—
(Value in gold dols.: 5.04 = £.)

	1913.	1914.	1915.	1916.	1917.
United States	73,012,668	43,307,753	75,589,885	106,988,508	138,084,920
United Kingdom	154,053,513	109,674,972	91,234,392	103,203,921	82,984,790
Brazil	10,898,057	11,015,246	13,975,596	20,035,698	37,875,632
Spain	14,582,567	10,204,333	15,262,371	22,695,909	27,492,924
Italy	40,947,525	29,498,317	28,492,038	35,933,244	26,343,374
France	44,815,239	26,558,755	17,916,135	25,258,419	22,602,647
Uruguay	3,762,166	3,477,105	2,530,020	4,140,873	6,977,408
Mexico	1,593,405	2,123,681	20,349,360	10,979,650	6,093,701
Paraguay	2,678,126	2,122,330	3,041,508	3,482,253	5,213,825
Chile	833,314	582,377	1,044,804	1,597,223	3,732,224
Japan	1,021,918	577,035	1,100,630	1,991,015	3,319,255
British Possessions	9,137,244	3,896,796	11,253,213	9,513,599	3,286,291
Switzerland	3,226,376	1,711,595	2,068,872	3,339,312	3,013,166
Cuba	1,326,076	1,304,519	1,172,615	2,227,064	2,684,399
Holland	4,795,220	3,322,274	2,666,636	3,717,851	2,240,875
Sweden	3,676,817	2,294,713	2,775,137	3,535,745	5,022,979
Norway	2,661,660	1,746,200	1,841,582	1,401,532	1,620,682
Peru	1,580	1,440,508	1,725	467,507	1,287,109
Bolivia	296,682	316,515	484,413	736,876	846,001
Portugal	680,693	379,952	321,924	461,621	699,887
Canada	1,044,180	572,268	1,523,885	1,896,514	482,808
Germany	83,933,786	47,435,414	7,600,355	590,880	294,655
Denmark	240,233	171,182	827,580	698,185	290,486
Belgium	25,839,772	14,395,103	1,149,142	465,500	96,036
South Africa	92,871	98,239	271,852	43,491	97,098
French Possessions	24,604	8,415	2,910	14,467	13,147
Austria-Hungary	6,983,064	3,021,398	255,592	16,999	9,796
Russia	597,114	507,812	17,093	17,592	1,480
Australia	1,204,292	57,472	11,328	17,072	33
Other countries	1,421,871	864,029	598,321	691,161	717,610
Total	496,937,094	322,529,964	395,488,006	396,120,571	380,321,178

MEXICO.

NEW BANKING LAW IN PREPARATION

According to the press of the United States a new law is now being prepared in Mexico City for submission to the National Congress, for the regulation of banking institutions.

It is believed that a law for the establishment of the National Bank of the Republic, with sole power to issue paper currency upon a metallic basis, is also in the course of being drafted.

URUGUAY.

OFFICIAL ENQUIRY INTO REQUIREMENTS OF INDUSTRY.

The Uruguayan Minister of Industries has commenced an investigation of industrial conditions in the country for the purpose of ascertaining what official action is necessary in order to promote trade and industry. The questionnaire addressed to traders is as follows:—

1. What kind of industry do you exploit?
2. Are your raw materials of domestic or foreign origin? Please enumerate them.
3. Are your workmen Uruguayans or foreigners? Are they generally competent?
4. Can you train apprentices? Would it be possible for the State in its industrial schools to train apprentices in your line?
5. Have you facilities for securing credit? Do you obtain better support from private or banking capital? Would you favour the introduction of the industrial warrant; that is to say, that banks would advance money on the guaranty of your factory, machines, buildings, etc.?
6. Do you consider your industry sufficiently protected by Customs duties?
7. If not, do you consider it preferable that raw materials used by you be exempted from duty, or that the import duties on foreign products similar to yours be increased?
8. Is competition with your industry due to the quality or the price of the imported article? Does this competition come from the Argentine, Brazilian, North American, or European industry? Please give full particulars.
9. Has your industry still a market in the interior which it could supply?
10. Can your line in the future furnish exportable products?
11. Will it be necessary to establish export bounties for your line?
12. Will you be benefited in the export trade by the drawback or refunding of import duties on raw materials imported by you and exported after conversion into products of domestic manufacture?
13. Do you require, in addition to Customs protection, other forms of protection, in order to compete with foreign products under conditions which are not prejudicial to domestic consumers?

IMPERIAL AND FOREIGN TRADE—continued.

OPENINGS FOR BRITISH TRADE.

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

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

UNITED KINGDOM.

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

An application has been recorded during the past week for the names of manufacturers of the following (among other) articles:—

Hat pin stems.

British manufacturers of these articles now in a position to supply are invited to make application for the name of the enquirer.

AUSTRALIA.

POWER HOUSE SWITCHGEAR.—The Sydney Office of H.M. Trade Commissioner in Australia has forwarded a copy of specifications, forms of tender, and a set of drawings in connection with a call for tenders by the Sydney Municipal Council for the supply, delivery, erection, testing and maintenance of power house switchgear.

Copies of the specifications and tender forms, for which a charge of 10s. 6d. each is made, may be obtained from the office of the City Electrical Engineer, Town Hall, Sydney, after payment of the fee to the City Treasurer.

Sealed tenders will be received by the Town Clerk, Town Hall, Sydney, N.S.W., up to 3 p.m. on the 28th April. Tenderers must deposit with the City Treasurer the sum of £100, before the time specified for the receipt of tenders.

Copies of the above-mentioned specifications, etc., may be consulted by British manufacturers of power house switchgear at the Enquiry Office of the Department of Overseas Trade (Development and Intelligence).

The following enquiry has recently been received at the Office of the High Commissioner for Australia, Australia House, Strand, London, W.C.2:—

TEXTILES, BOOTS AND SHOES, FURNISHING GOODS, ETC.—A Melbourne importer and indenter, now serving with the Australian Imperial Forces, desires to get into touch with United Kingdom manufacturers of the following goods with a view to acting as their representative in Australia, on an indenting basis:—Piece goods, laces, insertions, nosiery, underwear, boots and shoes, furnishing goods (including carpets, tapestries, and curtains), glassware, potteryware, hardware, brushware, and fancy goods.

NOTE.—Communications in regard to the foregoing enquiry should be addressed to the Official Secretary, Office of the High Commissioner for Australia, Australia House, Strand, London, W.C. 2, quoting the Reference No. 59/2/1.]

CANADA.

TEXTILES, NEEDLES, TOYS, ETC.—H.M. Trade Commissioner in Toronto reports that a partner of a firm in that city is shortly visiting this country, with a view to arranging to take up agencies, for the whole of Canada, for United Kingdom manufacturers of goods suitable for the Canadian market, which do not necessitate the carrying of bulky samples. The lines in which they are particularly interested are:—Hosiery, glove fabric, underwear, ribbons, handkerchiefs, and children's woollen knitted goods; sewing, latch, and phonograph needles; lead pencils, pocket knives, show laces, snap fasteners, washing prints, toys, etc. (Reference No. 1)

The following enquiries have recently been received at the Office of the High Commissioner in London for Canada, 19, Victoria Street, London, S.W.1:—

AGENT'S SERVICES OFFERED.—A Canadian manufacturer's agent, now in H.M. Forces, desires to get into

IMPERIAL AND FOREIGN TRADE—continued

touch with United Kingdom manufacturers wishing to develop business in Canada.

ENGINEERS' SUPPLIES, DRY GOODS, ETC.—A company, which is being organised at Sydney, Nova Scotia, wish to obtain the representation for United Kingdom manufacturers of engineers' supplies for use in coal mines and steel plants; also for dry goods and other lines.

AGENTS' SERVICES OFFERED.—A firm of commission merchants at St. John, New Brunswick, wish to obtain the representation of United Kingdom manufacturers desirous of developing their trade in the Maritime Provinces of Canada.

NOTE.—Communications in regard to the foregoing enquiries should be addressed as indicated above.]

The following enquiries have been received at the Canadian Government Trade Commissioner's Office, Portland House, 73, Basinghall Street, London, E.C.2, whence further information may be obtained:—

TEXTILE PRODUCTS, MACHINERY, ETC.—A Canadian company in Vancouver, covering Western Canada up to Winnipeg, is desirous of obtaining sole United Kingdom agencies, more especially in textile products, gloves and lace, machinery, steel products, and surgical appliances.

HARDWARE, MOTOR CAR, ELECTRICAL LINES, ETC.—A Toronto firm desires to act as purchasing agents for United Kingdom buyers of Canadian goods, and while prepared to handle any class of material, has been specialising in hardware, motor car, and electrical lines.

FOODSTUFFS, GREASES, TALLOWES, OILS, ETC.—A Toronto firm would be glad to act as purchasing agents, upon a commission basis, for United Kingdom buyers of foodstuffs, greases, tallowes, oils, etc., in which they specialise. The firm, which claims thorough experience of this class of business, is prepared to submit offers by cable and to attend to shipping arrangements.

MARKET SOUGHT FOR CEDAR POLES AND POSTS, SPRUCE PILING, ETC.—A Canadian company wishes to get into touch with United Kingdom buyers of cedar poles, cedar posts, spruce pilings, pit props, and railway sleepers.

MARKET SOUGHT FOR RADIAL COAL CUTTERS.—A Canadian company, manufacturing radial coal cutters, would be glad to hear from United Kingdom firms interested.

MARKET SOUGHT FOR BELT LACES AND LEATHER.—A Canadian manufacturer, in a position to export raw hide and tanned cut belt laces in any width, and also leather in the whole side, would be glad to hear from United Kingdom buyers.

MARKET SOUGHT FOR SHIRTS AND OVERALLS.—A Canadian company, manufacturing shirts and overalls, is desirous of being placed in communication with United Kingdom firms purchasing these goods both for the United Kingdom market and for re-export.

MARKET SOUGHT FOR CHAIN.—A Canadian company, manufacturing chain in many varieties, are in a position to fill export orders, and invite enquiries from United Kingdom buyers. An illustrated catalogue is available.

MARKET SOUGHT FOR WASHBOARDS, WASHING MACHINES, ETC.—A Canadian company, manufacturing several types of washboards, washing machines, clothes-horses, etc., and being in a position to undertake export trade, ask to be placed in correspondence with United Kingdom buyers.

NOTE.—Communications in regard to the foregoing enquiries should be addressed as indicated above.]

CANADA. UNITED STATES.

PLANT AND EQUIPMENT.—A firm of consulting and contracting engineers, with head office at Montreal and branches in Calgary, desire to represent, in Canada and the United States, United Kingdom manufacturers of the following plant and equipment for municipalities, large corporations, etc., with which they claim to have excellent connections:—Incineration and destruction plant, filtration plants, sewage plants, piping and tubing, petrol engines for pump driving, marine and aircraft work, power plant weighing machines, condenser and evaporating plant, steel boiler tubes, and case hardening furnaces. The firm proposes to open an office in New York later on. (Reference No. 2.)

NEW ZEALAND

BOILERS AND ACCESSORIES.—The Imperial Trade Correspondent at Dunedin has forwarded a copy of the specifications and plans in connection with a call for tenders by the Otago Harbour Board for the supply and delivery of a boiler or boilers, and accessories for the harbour tug "Dunedin." (Contract No. 456).

Copies of the specification and conditions of contract may

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be obtained from the Engineer to the Board, at whose office plans may be inspected.

Sealed tenders on the proper forms will be received by the Chairman of the Board up to noon on 10th April, at the Board's Office, Dunedin. Each tender must be accompanied by a deposit of £400 either in cash, cheque, or draft, plus exchange.

A copy of the above-mentioned specification, etc., may be consulted by British firms interested at the Enquiry Office of the Department of Overseas Trade (Development and Intelligence).

The time for the tenders is limited, and this intimation will therefore be of use only to British firms having agents in New Zealand who can be instructed by cable.

The following enquiry has recently been received at the Office of the High Commissioner for New Zealand, 415-416, Strand, W.C.2, whence further information may be obtained:—

PAINTS, OILS, VARNISHES, ETC.—An agent at present serving with the New Zealand forces desires to be placed in touch with United Kingdom manufacturers of paints, oils, colours, and varnishes, with a view to representing them on his return to the Dominion. The enquirer claims to have a thorough knowledge of this trade and is prepared to take up other lines which would work in with it. He expects to leave England at the beginning of February, and is prepared to call on manufacturers who may wish to secure his services.

Communications in regard to the foregoing enquiry should be addressed as indicated above.

SOUTH AFRICA.

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

SHIPPING OR BUYING AGENT WANTED.—A Benoni firm desire to get into touch with a United Kingdom shipping or buying agent. (Reference No. 3.)

WRAPPING PAPER, ETC., AND PAPER BAGS.—A Johannesburg firm desires to obtain the representation of United Kingdom manufacturers of wrapping paper, etc., and paper bags. (Reference No. 4.)

CEYLON.

TEXTILES, HARDWARE, ETC.—A Colombo firm of merchants and importing agents, claiming to have had a wide and varied experience in the Ceylon markets extending over about twenty-five years, desires to get into touch with United Kingdom manufacturers and exporters of the following lines, who have hitherto not been represented in Ceylon: Cotton, woollen and silk goods of all descriptions, hosiery, haberdashery, hardware, fancy goods, curios, general sundries, etc. (Reference No. 5.)

DENMARK.

TEXTILES.—An agent at Copenhagen desires to obtain the representation of United Kingdom manufacturers of textile goods (dowlas, etc.), pocket handkerchiefs, and stockings. (Reference No. 6.)

FRANCE.

H.M. Consul-General in Paris reports the receipt of the following enquiries:—

COPPER FITTINGS FOR CABINET MAKING, LOCKS, ETC.—An agent desires to get into touch with United Kingdom manufacturers of all kinds of cabinet and furniture fittings in copper, locks and padlocks, and hardware in general, with a view to obtaining agencies for these goods in France. (Reference No. 7.)

TOOLS, MACHINERY, ETC.—An agent seeks the representation of the United Kingdom for the sale of tool machinery and material appertaining thereto, in Paris and the Department of the Seine. The enquirer claims to be well known in Paris and to have extensive warehouses in a commercial quarter, particularly well situated for business. (Reference No. 8.)

MACHINERY, ENGINEERING GOODS, ETC.—H.M. Consul at Nantes, reports that an agent in that city desires to obtain an agency, on a commission basis, for United Kingdom manufacturers of machinery and engineering, or other goods. (Reference No. 9.)

ITALY.

HOUSEHOLD FURNITURE, MACHINERY, ETC.—H.M. Commercial Attaché in Rome reports that a Udine firm, founded, it is stated, in 1853, wish to get into touch with United Kingdom houses, with a view to developing an

IMPERIAL AND FOREIGN TRADE—continued.

import and export trade. The enquirer, who is at present in Rome, proposes to return to Udine (Friuli) as soon as circumstances permit, where, he states, there will be a large and immediate demand for kitchen stoves, pots and pans, cutlery and similar articles of household furniture, and it is for these lines he desires to take up agencies as well as for agricultural and industrial machinery. (Reference No. 10.)

MEXICO.

YARNS AND THREADS.—H.M. Consul-General in Mexico City reports that a firm in that city wishes to get into touch with manufacturers of the following goods for which they state there is a steady demand in Mexico:—Yarns generally used in the manufacture of hosiery, including mercerised cotton, artificial silk, pure silk, henequen, and cotton in all numbers from 12 to 120; and thread used in the manufacture of shawls, known as "two-cord thread," in all numbers from 12 to 120. The yarns are generally in packages of 10 lb. each and the thread in skeins, bunches, or on cones of 12 lb. to 12,000 yards. Samples are required, and as the yarns and threads must consist of a range of colours from crude (natural) to white and all colours, not less than six sets of samples of all colours and six colour cards should be submitted. (Reference No. 11.)

MOROCCO.

OFFICE FITTINGS AND STATIONERY, VETERINARY AND PHARMACEUTICAL PRODUCTS.—H.M. Vice-Consul at Tetuan reports that a general commission agent of Ceuta seeks agencies for United Kingdom manufacturers and exporters of the following goods:—Office fittings and stationery, veterinary and pharmaceutical products; tins for canning purposes; cutlery, razors, toilet requisites, etc.; looking-glasses; motor and bicycle accessories; fishing accessories; musical instruments; watches and clocks, jewellery (solid and of the cheap qualities), paints and varnishes; hats and caps; beverages: flour, preserved meats, fish pastes, etc.; sugar, coffee, and tea. Correspondence should be in French or Spanish. The enquirer also desires to get into touch with United Kingdom manufacturers of men's and women's boots and shoes of a superior quality (including rubber-soled shoes) and cheaper qualities, with a view to introducing these goods in Ceuta and Tetuan. Samples will be required. (Reference No. 12.)

NETHERLANDS.

COPPER GOODS.—H.M. Commercial Attaché at the Hague reports that a Netherlands firm desires to get into touch with United Kingdom manufacturers of copper goods, including sheet copper, copper ingots, copper wire, and copper tubes, with a view to placing orders. (Reference No. 13.)

NETHERLAND EAST INDIES.

AGENT'S SERVICES OFFERED.—H.M. Consul-General at Batavia reports that an agent at Sourabaya (a British subject) wishes to get into immediate touch with United Kingdom manufacturers desirous of appointing an agent for the Netherlands East Indies. With the exception of provisions and beverages, the enquirer claims to handle all lines required for the European and native markets, including all goods for agriculture, plantations, and mining, chemicals, piece goods, office appliances, etc. He works chiefly on commission, but is prepared to work on a consignment basis or to import on his own account if desired. (Reference No. 14.)

SPAIN AND COLONIES.

CENTRIFUGAL PUMPS.—H.M. Consul-General at Seville reports that an agent in that city desires to obtain an agency, exclusive for the territories comprising Andalusia, Estremadura, the Spanish zone of influence in North Africa and the Canary Islands on a commission basis, for a first-class United Kingdom firm manufacturing centrifugal pumps of from $\frac{1}{2}$ to 20 h.p. (Reference No. 15.)

SWEDEN.

MEN'S HATS.—A newly-founded firm in Gothenburg desires to get into touch with a first-class United Kingdom firm manufacturing men's hats of all kinds (hard and soft, felt and straw). (Reference No. 16.)

Shipping and Transport.

UNITED KINGDOM.

THE SHIPPING OUTLOOK.

Sir Joseph Maclay, the Minister for Shipping, has made the following statement in regard to the shipping outlook:—

"The termination of hostilities has eased enormously the shipping position. The shipments of munitions have ceased. Our merchant cruisers have been released for the merchant service fleet and the colliers have been demobilised. Numerous craft of all kinds, previously engaged in naval and military work, have been made available for bringing supplies to this country, and the removal of naval restrictions has meant a great speeding up of merchant shipping. The immediate effect of all these things is to increase the tonnage available for the bringing of imports to these islands by something equivalent to 10,000,000 tons of goods a year. The shipping losses having ceased and the output of tonnage continuing to increase, the position grows easier day by day. We are returning liners to their pre-war routes to bring the accumulations of cargo which are badly needed in this country (and which during the war, though in many cases already bought and paid for, had been left behind in order to concentrate shipment on the nearer, but much dearer, market of North America), and to take up the trade connections which were necessarily sacrificed in the interests of the effective prosecution of the war. The time is not far distant when it will be possible to release tonnage from requisition on a substantial scale, and so create a free market in tonnage and freight. Already the amount of space available for commercial cargo in the North Atlantic has been doubled, and instead of cargo competing for space, space is now competing for cargo."

Asked as to the future of British shipping, Sir Joseph answered:

"In spite of our very heavy losses, we have no reason to think that British shipping will not be fully equal to the demand likely to be made upon it. The great need of the moment is coal for export. We hope that with the release of miners from the Army it will not be long before the ships which now have perforce to go out in ballast can take outward cargoes, thereby at once relieving our financial situation and reducing the cost of our imported supplies. Our shipping is not by any means normal in its extent, but we are aiming at restoring the old conditions and getting rid of vexatious restrictions."

THE CARRIAGE OF OIL.

The Ministry of Shipping have issued the following statement:—

Various statements have appeared in the press relative to the "double-bottom" scheme of carrying Oil Fuel across the Atlantic, and in view of the remarkable results achieved by this scheme, a short account of its development and working may be of interest.

The normal method of conveyance of fuel oil is, of course, in specially constructed "tank steamers."

The use of the double bottoms, or ballast tanks, of ordinary cargo steamers for the conveyance of fuel oil has been known to the Admiralty for many years, and certain steamers had been adapted for the possible supply of the fleet by this method. It had been the practice to convey oil by this means from the Far East.

In 1915, the Anglo-Saxon Petroleum Company suggested to the Admiralty the possibility of developing this method to supplement tank steamers in conveying fuel oil to this country, the technical details of the scheme being worked out by Mr. C. Zulver, the Marine Superintendent of the Company. The policy was adopted, but only to a limited extent, owing to the impossibility of displacing "heavy" cargoes such as wheat, manganese ore, etc., which were vitally required in this country. Credit is due, however, to Messrs. A. Holt and Company for their pioneer work in fitting their steamers under the scheme in its limited form.

In June, 1917, owing to the intensive submarine warfare, and the enormous growth in the consumption of the Navy, it became apparent that unless the quantity of tank tonnage were increased to a very large extent indeed, and in a very short time, the stocks of petroleum products in this country would sink to an alarming extent.

It was accordingly decided to give the conveyance of fuel

SHIPPING AND TRANSPORT—continued.

oil absolute priority over all other classes of cargo, and the Ministry of Shipping at once worked out a scheme, in conjunction with all the principal liner companies, for fitting their steamers for the conveyance of fuel oil in double-bottoms and deep tanks; and no time was lost in extending the scheme to Tramps.

Appreciation is due for the good work done in fitting the steamer to the technical staffs of the liner and other companies concerned, and to the Anglo-Saxon Petroleum Company, whose engineers were employed by the Ministry of Shipping, both in the United Kingdom and in the U.S.A. to supervise the work. The services of Mr. Zulver were particularly valuable in this connection.

It became necessary in May, 1918, to limit the operation of the scheme somewhat in order to carry the largest possible number of U.S. troops, and on 5th November—the reserves of petroleum products having reached a certain level, and it being possible to maintain that level by tank steamer—it was decided to discontinue the scheme.

Apart from the valuable results achieved by this scheme during the war, the experience gained of carrying oil in this manner will certainly be of value in connection with the development of petroleum as a fuel for steamers after the war. The following figures in connection with the scheme may be of interest:—

Date of approval of extended scheme, 21st June, 1917.

Date shipments commenced, 3rd July, 1917.

Quantity carried to 1st June, 1918, 746,930 tons.

Total quantity to 11th November, 1918, 1,014,570 tons.

Quantity per day, 2,045 tons.

Number of ships fitted:—

In United Kingdom, 130; in United States of America, 331; total, 761.

Quantity of oil lost in transit by enemy action, 15,191 tons; quantity of oil lost in transit by marine loss, 2,291 tons; total, 17,392 tons.

ITALY.

ELECTRIC RAILWAY FROM LOCARNO TO DOMODOSSOLA.

According to "L'Esportazione," of Milan, the final convention has been signed by the Swiss and Italian Governments for the construction of the electric railway from Locarno to Domodossola. Work has been proceeding during the war, and, on the Swiss section some lines have already been laid, so that there is every prospect of the railway being completed rapidly after the conclusion of peace.

PORTUGUESE EAST AFRICA.

TRAFFIC AND PORT FACILITIES AT BEIRA.

(From H.M. Trade Commissioner.)

CAPE TOWN.

The following statistics of the traffic at the Port of Beira, together with a summary of the general port facilities, are of interest:—

SHIPPING IN 1913.

Number of ships clearing in normal times (year 1913 taken).—

Nationality.	Arrived.	
	Number.	Cargo. Tons.
Portuguese	93	4,157
British	236	103,062
German	197	23,814
Others	8	5,909

Nationality	Cleared.	
	Number	Cargo. Tons.
Portuguese	94	5,504
British	231	55,358
German	196	22,057
Others	8	4

Inward cargo was comprised chiefly of railway construction material 80,000 tons, mining and agricultural machinery 19,600 tons, and general cargo.

SHIPPING AND TRANSPORT—continued.

Outward cargo consisted of chrome ore 64,000 tons, copper 2,000 tons, concentrates and asbestos 1,200 tons, hides and skins 400 tons. No maize was shipped, although 15,000 tons were shipped the following year.

SHIPPING IN 1916.

In 1916 the traffic was as under (transports and war vessels excepted):—

Arrived.		
Nationality.	Number.	Cargo. Tons.
Portuguese	112	20,342
British	213	106,197
Norwegian	26	11,792
American	1	2,402
Swedish	1	47

Inward cargo comprised chiefly of general cargo 31,000 tons, railway material 2,000 tons, mining and agricultural machinery 7,000 tons, and flint pebbles for mines 1,800 tons.

Cleared.		
Nationality	Number.	Cargo. Tons.
Portuguese	111	20,342
British	213	106,197
Norwegian	26	11,792
American	1	2,402
Swedish	1	47

The outward cargo consisted of chrome 87,000 tons, copper 26,000 tons, asbestos 4,000 tons, base metals 2,000 tons, maize 25,000 tons.

PORT FACILITIES.

Quay Space.
Nil.

Storage Accommodation.
Covered. Customs sheds approximately 33,000 tons.
5 Hulks. Total capacity, 4,500 tons.

Cold Storage.
Nil.

Grain Elevators.
Nil. There is a grain cleaning and drying plant for killing and extracting weevils.

Number of Lighters and Capacity.
71 pontoons and lighters, capacity 10,150 tons.
5 tugs.
1 sea-going tug.

Capacity for Handling Goods Day by Day.
Customs wharf. Cranage power, 700 tons per day.
Railway piers. Cranage power, 2,000 tons per day.
Heavy lifts up to 20 tons.

Tonnage of Coal Landed.
Nil. Coal received for bunkering purposes in pre-war days was brought by sea and stored in hulks. Recently bunker coal from Wankle, South Rhodesia, is being brought at the rate of 1,000 tons monthly.

Railway Distribution Facilities
Receiving and forwarding sheds representing covered ground area of 55,000 square yards. Goods trains twice daily to Rhodesia. Practically all the tonnage received at Beira is in transit to Rhodesia, only a small proportion being for Portuguese territory.

EXPORTS.

The Union Miniere Copper Mines (Belgian Congo) rail for export at the present time roughly 2,000 tons monthly. Falcon Mines (Umyuma, South Rhodesia) rails copper at the rate of 500 tons monthly, practically all being shipped to America. The Chrome Mines, Selukwe, rail approximately four to five thousand tons of chrome ore monthly; America takes the major portion, small shipments being made to England. Asbestos from the Victoria District, South Rhodesia, and base metals from Northern Rhodesia are being shipped in increasing quantities to English markets. The export of maize from Rhodesia is on the increase.

IMPORTS.

The principal imports—exclusive of railway construction material—are mining machinery and spares, mine supplies, cyanide and flint pebbles—the latter amount to over 1,000 tons yearly and are shipped from France.

There are several projected schemes for the development of the harbour, but these are in abeyance on account of the war.

Minerals and Metals.

AUSTRALIA.

ZINC PRODUCTION AND SUBSIDIARY INDUSTRIES.

In connection with the action taken by the Commonwealth Government to organise the Metal resources of Australia, a short review of the position so far as the production of zinc and the development of related industries are concerned has been communicated by the Electrolytic Zinc Company of Australasia, Pty., Ltd., to the Acting Prime Minister of the Commonwealth.

Although the British Empire contains the greater portion of the more easily available zinc ores of the world, it produced before the war, according to this review, less than 40,000 tons annually of primary spelter or zinc, whilst the consumption of this metal in the United Kingdom alone amounted in 1913 to 195,000 tons. At the present time the United Kingdom, France and Italy, are all practically dependent upon America for supplies of spelter and high-grade zinc for munitions.

Pre-war Australia alone exported annually zinc concentrates equivalent to 200,000 tons of spelter. The enormous demand for zinc of high purity gave rise to a rapid development in Canada and the United States of electrolytic processes for the manufacture of this metal.

Very shortly afterwards attention was turned to the possibility of establishing this industry in Australia, and as soon as hydro-electric power became available in Tasmania, one of the principal zinc concentrate producing companies—Amalgamated Zinc (De Bavay's), Limited—commenced investigations with a view to working out the application of the electrolytic process for the production of high-grade zinc from Australian ores. For this purpose it subsequently promoted the Electrolytic Zinc Company of Australasia Proprietary, Limited, and later was joined by Zinc Corporation, Limited, in that important undertaking.

Constructional and investigational work was started at Risdon, near Hobart, in January, 1917. From March, 1917, the first small unit was in operation, and later the first larger unit designed to produce 25,000 lb. of zinc daily was started and has since operated continuously.

It may now be said definitely, the review points out, that this process is completely established, that the product is fully up to expectations, and that it is excellently suited to the manufacture of all high-grade alloys for munitions and commercial purposes, and of many other important products.

From an Australian point of view the application of zinc to the recovery of gold from cyanide solution, and to the desilverising of lead, are of immediate and everyday importance.

Zinc is also used in large quantities in the form of rolled blocks to protect ships' boilers from corrosion, and in the form of rolled sheet and strip for roofings, gutterings, etc.

SULPHURIC ACID.

Sulphuric acid is a by-product of the process of zinc manufacture, and the industry will afford a valuable source of this commodity, with the result that Australia will not be dependent upon imported brimstone and pyrites as in the past. Sulphuric acid is now being made at Broken Hill to the extent of approximately 100 tons weekly from the sulphur in the zinc concentrates, thus replacing imported sulphur, which is very expensive and difficult to obtain. The desulphurised ore is being shipped to Hobart for the extraction of the zinc.

The consumption of acid at Broken Hill is limited and relatively small, and steps are being taken to desulphurise the bulk of the ore at other industrial centres, where the product will be available for superphosphate manufacture and for other chemical industries.

SUPPORT FOR TIMBER INDUSTRY.

The development of the zinc industry in Tasmania involves the shipment of large quantities of ore from Broken Hill via Spencer's Gulf, and gives, consequently, good opportunities for economic back loading. This will be of material assistance to the timber trade of Tasmania, and will enable the substitution of Tasmanian hardwoods for imported timber. This arrangement is now in operation, and approximately 250,000 super feet of timber is delivered at Port Pirie each month for the use of the Port Pirie Smelters and the Broken Hill Mines.

To date over £300,000 has been spent in connection with the Electrolytic Zinc Company's undertaking, and a very large expenditure will be incurred in the installation of additional units and in the establishment of other related industries.

MINERALS AND METALS—continued.

PROPOSED FURTHER DEVELOPMENTS.

It will be realised that a new avenue of employment will thus be provided, and one which will give more scope for the employment of partly disabled men than the older retort process.

The programme of development includes all other zinc products (in addition to the metal itself), which in the past have been produced mainly outside the Empire, and largely in Germany.

The importance of establishing a domestic production of these materials is obvious since the rubber and paint industries with all their ramifications are dependent on them and cannot operate without them. These include zinc oxide in various grades, and lithophone. It is possible to produce in connection with the electrolytic process the higher grades of oxide, such as are used in enamels and white rubber goods, as well as the less refined materials for paint manufacture. Lithophone is a pigment which is rapidly increasing in popularity and finds extensive application in some classes of rubber goods.

The first unit of a lithophone plant, which will have a capacity of five tons daily, is now under construction and will be started shortly.

ZINC OXIDE.

Zinc oxide manufacture on a preliminary scale is in operation, and production will increase rapidly. A plant of British manufacture capable of producing 200 tons monthly of rolled zinc sheets will be installed at Hobart early this year.

The zinc produced at Hobart has, to date, averaged over 99.9 per cent. zinc, and is probably the highest grade in the world. This grade of zinc is the only kind that can be used for galvanising telephone wires, as the ordinary metal gives a galvanising coat which cracks on bending. For special purposes electro-galvanising is adopted, and this also is to be developed at Hobart.

ORNAMENTAL CASTINGS

Castings for ornamental purposes are principally made of zinc, for which very high-grade metal only is suitable, and this industry is to be taken up.

ELECTRO-CHEMICAL INDUSTRIES.

Zinc alloys and products are extensively used commercially, and the demand for these is certain to increase very considerably with the development of local industries. When additional blocks of power are available, it is proposed to establish a number of electro-chemical industries for the production of materials essential from the point of view of making Australia self-contained and independent of foreign sources of supply.

METALLIC ALUMINIUM.

In addition to the manufacture of electrolytic zinc and other lines already mentioned, attention is being directed to the question of production of metallic aluminium, which is essential for the manufacture of aeroplanes. To this end preliminary and investigational work is being proceeded with as rapidly as possible, and it is anticipated that the erection of a plant to produce at the outset 1,000 tons annually, will be undertaken at Hobart when the necessary power is available from the hydro-electric scheme.

A summary of the existing industries established at Hobart by the Electrolytic Zinc Company and of those to be undertaken later is appended:—

INDUSTRIES ALREADY OPERATING.

Electrolytic zinc. 12 tons daily. This output will be increased to 100 tons daily, utilising 25,000 h.p. as soon as the power is available.

Zinc oxide of all grades and for all purposes.

INDUSTRIES TO BE OPERATING WITHIN TWELVE MONTHS.

Lithophone. First unit 5 tons daily, to be increased to 50 tons daily in line with 100 tons zinc plant.

Rolled zinc for all purposes, including blocks for ships' boilers, zinc shavings for the gold industry, thin zinc sheets for commercial purposes.

Zinc dust for sherardising, etc.

INDUSTRIES TO BE UNDERTAKEN WHEN MORE POWER AVAILABLE.

Metallic aluminium in all forms, including sheets, tubes, etc.

Zinc alloys.

Zinc chloride.

Zinc sulphate.

Caustic soda, bleaching powder, and other chlorine products.

Other electro-chemical industries as the market becomes sufficiently large to justify erection of a minimum-sized commercial plant.

Textiles.

BRITISH INDIA.

COTTON CULTIVATION IN BENGAL.

A Report on the measures which have been taken to encourage cotton-growing in Bengal has been issued by the Director of Agriculture for the Presidency.

The question of cotton-growing in Bengal formed one of the subjects of discussion at the summer meeting of the Provincial Agricultural Association held in Calcutta on 3rd July. The inclusion of this subject was due to the suggestion of the Director of Agriculture, as the question was attracting some attention amongst the educated section of the rural community and as incidents for considerable quantities of cotton seed had been received and were being supplied by the Agricultural Department. The question is by no means a new one to the Agricultural Department, as any marked rise in price of cotton goods is generally accompanied by a demand for the supply of cotton seed.

RECOMMENDED AS A WAR MEASURE.

The general conclusion arrived at at the Provincial Agricultural Association's meeting in July was that, although cotton was not to be recommended as a field crop in the plains of Bengal, and although the general situation as regards the price of raw cotton or manufactured cotton goods could not be affected by any possible extension of cotton-growing in the Presidency, yet as a special war-time measure, and in view of the efforts which were being made to reintroduce home-spinning in certain localities owing to the high price and scarcity of cotton goods, a local supply of raw cotton might be organised through the growing of cotton plants amongst other crops on small areas on the higher homestead lands near village sites.

Cotton-growing would thus be a subsidiary industry to home-spinning, and its extension would depend largely on the extent to which local efforts to revive the *charka* proved successful.

The following measures were recommended:—

(1) The extension of the growth of the various types of tree cotton (*Gossypium arboreum*) commonly found in many districts. It was recognised that this was a matter for local effort, no funds being necessary as the seed of the tree cotton would be available locally at the beginning of the cold weather season.

(2) It was considered desirable to supply cotton seed of superior field types in small quantities to growers.

On the recommendation of the meeting Government has agreed as a special war-time measure to financing a free distribution of cotton seed, provided the distribution is extensive and in small quantities, in order to supply a nucleus seed supply, and has sanctioned the appointment of five additional District Agricultural Officers from 1st December.

DIFFICULTIES.

In order to understand the exact situation, the following considerations, the Director states, require to be borne in mind:—

No part of Bengal is suited for cotton-growing; much the greater part of it is absolutely unsuitable, and the crop is confined to a comparatively small and highly specialised area on the eastern borders of the Presidency.

CHARKA SPINNING.

There was considerable difference of opinion at the meeting regarding the prospects of a revival of *charka* spinning.

The policy of the Agricultural Department with regard to cotton-growing aims at assisting any possible development of *charka* spinning. But even in the most favourable circumstances, there will be no results until the cold weather of 1919-20, and that little locally-grown cotton will be available till then. The question of obtaining a supply of lint for local *charkas* is therefore of more immediate importance than that of the seed supply, which can only bear fruit a year hence.

As regards the question of a general revival of the *charka* as an emergency measure, prospects which were always doubtful, are now by no means bright. The Director of Agriculture, therefore, anticipates a further falling off in the interest shown in cotton-growing. Nevertheless, as there appears to be little prospect of cheap cloth for some time to come, it is proposed to carry out the policy previously settled on.

TEXTILES—continued.

SOUTH AFRICA.

PRESSING OF WOOL AND MOHAIR FOR SHIPMENT.

A Conference of the South African Shipping Committee, the Central Wool Committee, and representatives of wool and mohair buyers, brokers and pressers of all the Union ports, has announced the following important decisions as to the pressing of wool and mohair for shipment:—

1. That the density to which wool and mohair shall be pressed be:

(a) Greasy Wool.—Heavy or mixed heavy and light types, 17 lb. per cubic foot. Shipments consisting exclusively of specially light types (to be accompanied by shipper's declaration defining the type, as indicating that only light varieties are included), 15 lb. per cubic foot.

(b) Scoured wool, 10½ lb. per cubic foot.

(c) Mohair (except for shipments consisting exclusively of Basuto and blue mohair), 20 lb. per cubic foot; Basuto and blue mohair (to be accompanied by shipper's declaration stating the character of the shipment), 17 lb. per cubic foot.

2. (a) That produce be measured at the pressing or other warehouses not more than 14 days prior to shipment.

(b) The Shipping Committee to arrange for the measuring being done by an official measurer to be appointed at each Union port to act on account of the various steamship lines.

(c) That, instead of insisting upon every bale being measured and found to be of the necessary density, a percentage of the bales of each shipment from each warehouse be measured and an average compliance with the regulations in respect of each variety of produce accepted.

Great importance was attached by the Conference to the necessity for produce, in the initial stages, being box packed and being despatched from up-country stations in new packs or packs of approved strength or quality.

The Controller of Imports and Exports, Pretoria, has been requested to extend to woolpacks the facilities he is already granting for the importation of binding steel and wire, and to take such steps as will allow of only new packs of not less than 10 lb. weight being brought into the country. Hoop-iron has already been very successfully imported for the benefit of the farmers.

PHILIPPINE ISLANDS.

THE MANILA HEMP INDUSTRY.

For over a century the *Musa textilis*, the abacá (manila hemp), has been used in commerce. Its peculiar fitness for the manufacture of marine cordage at once attracted the attention of the sea-going world, and the demand for it has since grown yearly.

The Bureau of Agriculture of the Philippines early recognised abacá (hemp) as the foremost Philippine industrial plant, and it has therefore made a systematic study of, and collected data affecting all phases of the industry. Over 14 varieties have been discovered, and the effects of soil and climate on each have been ascertained.

According to the local press the industry still requires to be modernised—in the sense of scientific instead of haphazard cultivation, and the more extensive use of machinery (i.e. when satisfactory machinery has been devised).

It was in 1818 that the first considerable quantity of the fibre was exported from the Islands. That year 41 tons were sold abroad, and from that time on abacá fibre has formed a considerable portion of the recorded Philippine exports. It was not until after 1850, however, that the exportation of the fibre reached the commanding importance which it now holds in the export commerce of the islands.

Abacá fibre classified as of good quality is from 2.5 to 5 metres long, of glossy white colour, very light and strong, and of clean, even texture. Its chief value for ship's cordage lies in its relative lightness and strength. Comparative tests made upon rope of abacá and rope of English hemp show, according to an American view, the abacá fibre to be much stronger than the English hemp fibre. An abacá rope, 7.5 centimetres in circumference and 3.35 metres long, stood a strain of 2,122.27 kilograms, before breaking; an English rope of the same dimensions broke with 1,766 kilograms. Again, an abacá rope 3.56 centimetres in circumference gave way under 677.27 kilograms, and an English rope of the same circumference broke under 538.18 kilograms.

Japan imported 12,025,326 kilograms, of manila hemp of all grades in 1917, compared with 7,772,581 kilograms, in 1916, and 6,704,496 kilograms, in 1915.

Chemicals and Dyes.

BRITISH INDIA.

FIRST INDIGO CROP FORECAST, 1918-19

The first forecast of the indigo crop issued by the Director of Statistics on 17th October, estimates the total area sown in British India at 280,500 acres, being 55 per cent. below the revised estimate at the corresponding date of last year. As compared with the final estimate of last year (690,600 acres), the present estimate shows a decrease of 59 per cent.

The total yield of dye is now roughly estimated at 32,100 cwts., as against 70,300 cwts. estimated at this time last year, or a decrease of 54 per cent. As compared with the final estimate of last year (87,800 cwts.), the present estimate shows a decrease of 63 per cent.

Weather conditions at sowing time were unfavourable owing to deficient rainfall, and the condition of the crop, on the whole, is only fair.

Details for the provinces are given below:—

Province.	Area.		Yield.		Yield per acre.	
	1918-19	1917-18	1918-19	1917-18	1918-19	1917-18
	acres.	acres.	cwts.	cwts.	lb.	lb.
Madras	114,700	275,700	14,900	34,900	15	14
Bihar and Orissa	66,200	85,900	7,100	10,300	12	13
United Provinces	51,700	179,000	3,400	15,000	7	9
Punjab	30,900	70,100	4,900	8,600	18	14
Bombay and Sind (including Native States)	6,800	9,400	1,000	1,900	16	23
Bengal	10,100	7,000	800	500	9	8
Total	280,500	627,100	32,100	70,300	13	13

JAPAN.

INVESTIGATION OF VEGETABLE DYE-STUFFS.

(From the British Consul.)

SHIMONOSEKI.

Considerable attention has been devoted of late to the exploitation of the resources of the woods and fields in Japan with a view to the increase in production of vegetable dye-stuffs (owing to the present scarcity of chemical dyes), and recent research in this direction has met with success.

The Department of Agriculture and Commerce has caused investigations to be conducted throughout the country through the experts attached to the Prefectural Governments and to the various agricultural associations and the Forestry Bureau.

Some sixty varieties of trees and twelve varieties of plants have been found to have value as raw material for dyes. The Director of the Forestry Bureau of Okayama has enumerated some of these as follows:—

Pinus densiflora (Japanese: Aka-matsu).—This tree is found throughout Japan in a wild state. A dark brown dye is extracted from the leaves, which are used for cotton yarn.

Pinus thunbergii (Japanese: Kuro-matsu).—This common variety of pine gives a dark dye. A certain factory in Kagawa Prefecture extracts this dye as follows:—10 parts of fresh leaves are added to 3.3 parts sulphur and 10 parts sulphite of soda, and the mixture is heated with water for five hours. The resulting dye commands a ready sale.

Chestnut (Japanese: Kuri).—Also a common tree. Treatment of the bark with sulphide of copper gives a dye for saddlery wares. The leaves and bark also yield a black which is used for dyeing silk haori (outer garments). The root gives a yellow dye used in staining furniture and similar work.

Quercus dentata (Japanese: Kashiwa).—This tree is found generally in Japan. From a decoction of the bark a dye material is obtained, which is used for dyeing hemp, cotton, etc., khaki colour.

Quercus serrata (Japanese: Kunugi).—The leaves are collected in September and fermented. The fermented leaves are boiled and yield both brown and deep green dyes.

Pomegranate (Japanese: Zakuro).—The bark of this tree gives a leather dye.

Pasania cuspidata (Japanese: Shii).—A dye is made from this tree for fishing nets.

CHEMICALS AND DYES—continued.

Camellia Japonica (Japanese: Tsubaki).—The leaves when pressed fresh yield a green which is used for dyeing cheap mosquito nets.

A tree called in Japanese "Motokoku." This tree gives from the leaves a light brown dye.

Myrica Rubra (Japanese: Yamaromo).—The juice extracted from the leaves and bark gives a dye for fishing nets, also a priming for indigo dyeing, and is used for dyeing khaki uniform cloth.

Eleurites Cordata (Japanese: Abura-giri). *Quercus Gilve* (Ichii). *Pagoda-tree* (Enju). *Juglans Sieboldii* (Onigurumi). *Raphidecus Japonica* (Sarimbai), and several other trees yield dye material from their leaves, bark or roots.

Of plants from which dyes may be extracted may be mentioned the *Saevitia Chinensis* (Senburi), *Lespedeza Pilosa* (Neko-hagi), and *Ceptsis* (Oren).

THE CHLORATE OF POTASH INDUSTRY

Following the outbreak of the war the manufacture of chlorate of potash in Japan underwent a great development, but depression has resulted owing to over-production, high freights, and the disinclination of steamship companies to ship the chemical, owing to its dangerous character.

This industry is not of long standing in Japan, for, according to the "Japan Chronicle," it was only in 1905 that the Nippon Kagaku Kogyo Kaisha began the tentative manufacture of chlorate of potash. This was the first undertaking of the kind in the country. It was not until 1912 that any considerable quantity of the article began to appear on the market.

During the war the suspension or reduction of imports sent up prices, and as a result a number of new producers made their appearance. The industry continued active up to last year, but the inevitable result occurred—over-production. This naturally led to a decline in prices, and the industry has since become depressed. The trade now depends chiefly upon exports to the United States and South America.

NUMBER OF FACTORIES ENGAGED.

According to investigations made by the Department of Agriculture and Commerce, at the end of 1917 there were 49 factories engaged in the manufacture of chlorate of potash. Their total capacity amounted to 10,000 tons a year, but the actual output totalled only 6,000 tons, while the capital invested in the industry amounted to 6,000,000 yen.

About 60 per cent. of the total output is represented by that of the Nippon Kagaku Kogyo Kaisha, Nippon Denka Kogyo Kaisha, and the Kyushu Kido Kaisha, the other producers operating on a small scale. According to capacity, the 49 factories may be classified as follows:—

Monthly production.	Factories.
Over 1,000 barrels	3
Over 300 barrels	7
Over 100 barrels	15
Under 100 barrels	24
Total	49

DOMESTIC CONSUMPTION.

The increase in the domestic demand is much less than that in output. No definite figures regarding domestic consumption are available, but there is reason to believe that before the war it amounted to about 3,700 tons.

The following figures represent the imports in recent years mentioned, the quantity being in kin (1 kin=about 14 lb.):—1907, 6,133,758 kin; 1908, 4,431,865 kin; 1909, 7,458,958 kin; 1910, 6,092,342 kin; 1911, 6,826,937 kin; 1912, 6,654,317 kin; average, 6,182,000 kin. The average of 6,182,000 kin works out at about 3,700 tons; and, since there was practically no output in this country at the time, this figure may be taken as showing the domestic consumption before the war.

PROSPECTS.

It seems that the trade has now passed its height of prosperity, but prices are still high as compared with the pre-war quotations. In October about 50 yen per barrel was quoted, compared with 15 or 16 yen before the war.

As to the future prospects, considerable doubt is expressed whether Japanese producers will be able to successfully compete with their British and German rivals. As a remedy it is urged that small-scale producers should combine, so as to increase their power of resistance against foreign competitors.

Vegetable Oils.

BRAZIL.

NEW VEGETABLE OIL INDUSTRIES IN PARA.
(From the British Consul.)

PARA.

What may be fittingly described as a war industry in Para is that which has recently been established for the manufacture of salad oil from the kernel of the "Brazil" nut, colloquially known as Castanha. Whether this is an industry that will be continued after the war it is difficult to say, from the fact that in normal times of unrestricted imports to Europe and the United States, the price of these nuts may be much too high for the manufacture of oil in Brazil.

In pre-war times a litre bottle of Portuguese salad oil was obtainable in Para at from 18 to 2 milreis (1s. 8d. to 2s.), whereas to-day the cost is 14 milreis (14s.), or, if made in Rio de Janeiro, 8 milreis (8s.).

During the past year Castanhas ranged in price from 14 milreis to 20 milreis per hectolitre (50 kilos, or 112 lb.). This refers to first-class grades, of which, during 1918, 125,000 hectolitres were exported.

Of the total available crop there is always a large quantity of small nuts, and these are now being utilised for the manufacture of salad oil. These were purchasable during the past season at from 8 milreis to 14 milreis—the average being 12 milreis—per hectolitre, which, it is authoritatively stated, only permits of the sale of locally-made oil at the minimum price of 2.5 milreis (2s. 6d. per litre). This, compared with the pre-war cost of edible oil, suggests that this new industry may have a very short life, but as a war emergency it is commendable, and at the same time indicative of the possibilities attendant on the exploitation of the arboricultural wealth of the Amazon Valley, and particularly its oil-bearing products.

In the larger of two factories which at present devote themselves to the extraction of salad oil from Castanhas, the process is simple and practical, as far as local mechanical facilities permit. The kernel has first to be taken from the shell, and in order to facilitate this process the nut is subjected to heating by means of steam, or in an oven. Female hand labour is employed in shelling, on completion of which the kernel is placed in a revolving crusher, and, from the resultant paste is extracted the oil, which is obtained by means of hydraulic pressure. The last process is the filtration of the oil, after which it appears a pure light golden colour. Both in flavour and in odour the oil is very palatable and agreeable.

The oil is made up for the market in kerosene oil tins, each of which has a nett capacity of 18 litres or 17 kilos. It is estimated that one hectolitre of nuts will produce 10 litres (7 kilos) of oil, or, in other words, 10 to 12 milreis worth of nuts will yield oil to the value of 25 milreis. The factory can produce a maximum of 600 litres per day. The oil is marketed locally, and in addition to being exported down the coast of Brazil, is sent in large quantities to the Government of Cayenne, with which one of the local exporting houses has a contract up to the end of this year.

The residue is at present used for fuel in the factory, but it has every appearance of being admirably suitable for the manufacture of oil-cake as a cattle food. The nut shells are also consumed in the factory furnace, the ash from which could no doubt also be utilised for the manufacture of caustic soda. Meanwhile no use is made of the ash.

UCUUBA NUTS.

Ucuuba Nuts are also treated in this factory. These are bought at about 240 reis per kilo, and are obtainable in moderately large quantities. During the past year the factory in question consumed 50 tons of ucuuba in the manufacture of a fat used in candle and soap-making. Both shell and kernel are utilised in the process, and it is stated that only 30 per cent. of the raw material results in fat on account of the existing deficient mechanical installation, but that better results are expected from the application of a chemical process which is at present being studied. The fat now produced is sold for 1.4 milreis (1s. 4d.) per kilo.

The exports of ucuuba nuts during the first six months of this year amounted to 485,337 kilos, of which 413,690 kilos went to Europe and the remainder to the south of Brazil.

VEGETABLE OILS—continued.

PANAMA.

CULTIVATION OF THE COCONUT PALM.

(From the Acting British Consul.)

COLON.

The continual discovery of new industrial uses for the product of the coconut palm, and the consequent steady rise in price of the nut, has caused more and more attention to be paid to the systematic cultivation of this tree in Panama.

The Republic of Panama is well adapted to this industry, especially on the Atlantic Coast. The soil is extremely fertile, there is a plentiful supply of water, and the country is not subject to hurricanes or devastating storms of any kind.

It is not surprising, therefore, to find that a very fine nut is grown. It is called the San Blas nut from the district where it is has been most collected, and is famous in the New York market, fetching higher prices than does any other West Indian nut, except, perhaps, that grown in Porto Rico.

Until within the last few years, however, no serious attempts have been made to grow the palm systematically. The nut is found all along the coasts of the Republic, particularly on the Atlantic side, from the Costa Rican to the Colombian border, but it is most prolific from the small coast islands, west of Nombre de Dios eastwards into the San Blas country, as far as Colombia. In that region the trees are either wild or have been planted in haphazard fashion with little or no attempt to clear the undergrowth; they are many years old and yield large numbers of nuts.

EXPORTS.

The nuts are exported from Colon by two or three companies, who maintain stations at different centres along the coast, notably Playa de Damas, Santa Isabel, and San Blas. To these centres the nuts are brought in small quantities by Indian and other natives and are then bought there and collected for forwarding in bulk to Colon in small schooners with a capacity of from 40,000 to 75,000 nuts. In Colon the nuts are bagged and forwarded to New York. In 1917 the export attained an amount of about 20 million nuts valued at £12,000. Of these 19,500,000 were exported from Colon. The United States took the entire product.

The price of coconuts showed a steady tendency to rise before the war. Such a tendency was needed to overcome the reluctance to invest money in an undertaking which in any event involves much careful supervision and hard work for a period of seven years before any returns can be expected, especially when the work has to be carried out in a very uncongenial climate.

NEW PLANTATIONS.

A few plantations were started some five years or more ago, among them one in Bocas del Toro, two on the Pacific Coast of Panama, and one on the Atlantic Coast. The last-mentioned is situated at the mouth of the Rio Indio, and two miles west of Nombre de Dios. This plantation was started five years ago. Nine hundred acres of virgin and jungle forest were cleared in a rich alluvial valley soil and 50,000 trees planted—10,000 were completed in August, 1913; 30,000 more were finished some months later; and the last 10,000 trees were in the ground 3½ years ago. The seed nuts were specially selected from the product of high yielding San Blas palms. The capital of the company was 50,000 dols. United States' currency. This amount has already been spent, and by the time the plantation is on a paying basis it is estimated that a further 35,000 dols. will have been raised, thus placing the final cost at about 1.70 dols., or 7s. per tree, which is considered low.

The roots of the first 10,000 palms have taken well, and the undergrowth in that part of the plantation is rapidly disappearing altogether. All the trees present a healthy appearance. Of the 50,000 trees, the first 10,000 are beginning to bear. Instead of the usual small quantity as a first year's crop, many of these palms have shown as many as 100 nuts and more.

It is expected that by the end of 1919 the plantation will be giving at least 20,000 nuts a month, and that well within seven years from its foundation it will be on a paying basis. This confidence appears to be justified from appearances. Of the entire 50,000 trees originally planted, not more than 4,000 have had to be replaced on account of losses from all causes, e.g., beetles, disease, lightning.

The port for the plantation will be in Bahia San Cristobal, near the mouth of the Rio Indio. There is plenty of water and sufficient facilities to permit the lading of auxiliary schooners of large enough size to trade direct with New York.

The Central European Powers.

GERMANY.

TRANSPORT.

PROPOSED INCREASE OF RAILWAY TARIFFS IN PRUSSIA.

Vonwärts learns that the new Prussian Minister of Railways contemplates the imposition of an increase up to 60 per cent. on all goods tariffs (with exceptions if necessary in favour of potatoes and corn). He proposes further to increase passenger fares by the following percentages: Fourth class 20 per cent., third class 25 per cent., second class 35 per cent., first class 100 per cent. If the financial results of railway working improve, the increases are to be reduced or abolished altogether. The new Minister of Railways is an opponent of the four-class system in passenger traffic, and desires to allow only two classes, but considers this reform to be impossible at the present time. He has been authorised to negotiate with all German Federal Governments on the question of uniformity in tariffs, but not to bind the Prussian Government in reference thereto.

INDUSTRY.

THE RHENISH-WESTPHALIAN IRON INDUSTRY.

From leading experts the *Münchener Neueste Nachrichten* learns that the situation of the Rhenish-Westphalian iron industry is not very hopeful. The works, it is true, have numerous orders, enough to employ them for some months to come, but the scarcity of coal is limiting their output. Owing to the withdrawal of foreign labour and prisoners of war the daily output of coal, which last year amounted to 310,000-320,000 tons, has declined to about half that amount. Even if in the near future the output is increased, the difficulties of transport will have to be reckoned with. Moreover, the labour question is causing anxiety, although so far the labour troubles in the Ruhr district have been of a local character. Ore is also very scarce. Owing to lack of rolling stock little has been imported from the Lorraine-Luxembourg ore districts. Sweden has also sent only small quantities. On the other hand, the furnaces have been called upon to work to the limit of their capacity, and in consequence the stocks of ore have declined to such an extent that the furnaces will be able to carry on even at low speed for a very short time only. Instead of increased employment being provided for the returning soldiers, working hours will have to be considerably cut down to enable the works to keep going at all.

PROSPECTS OF CEMENT PRODUCTION.

The German Cement Association informs the *Münchener Neueste Nachrichten* that while the object of the competent authorities during the war was to confine private building activities within the narrowest possible limits, the opposite policy is now being adopted. Unfortunately, however, the production of cement is dependent upon coal production and transport facilities, and under present conditions has gigantic difficulties to contend with. Transport facilities have been reduced to a minimum by the demobilisation and the conditions of the armistice. Definite official utterances show that the coal supply will certainly not become better, and will very likely become worse in the near future. Meanwhile, the cement works are required to reinstate all their former workmen when discharged from the army. The productive capacity of the German cement industry amounts to about 10 million tons per annum. The quantities of cement despatched in the last years of peace amounted to 7.5 million tons per annum; the quantity despatched in 1917 was 3.14 million tons; in 1918 so far only 1.6 million tons have been despatched, and by the end of the year this figure will have risen only to 1.8-1.9 million tons.

TRADE.

A MEAT IMPORTING COMPANY.

According to the *Weser Zeitung* the Hamburg-America Line, the Wholesale Importing Company, and the "Produktion" Association in Hamburg, have combined to form a Meat Importing Company, the object of which is to purchase overseas and import live cattle, frozen meat, and meat conserves. The import of live cattle from Argentina is a new venture, and is due to the shortage of ships specially adapted for carrying frozen meat.

THE CENTRAL EUROPEAN POWERS—continued

AUSTRIA-HUNGARY.

FINANCE.

OFFICIAL VIEW OF HUNGARIAN DEBT.

The Hungarian Minister of Finance has informed *Pester Lloyd* that the new Government regards as one of its principal tasks the regulation of the State finances and the restoration of the rate of exchange. The ultimate solution of this problem will depend in large measure on the attitude adopted towards the Hungarian debt at the Peace Conference by the territories to be detached from Hungary.

The war debt of Hungary amounts to between 33 and 34 milliards of kronen, of which about 16 milliards are war loans, 10 milliards are owing to the Austro-Hungarian banks, and the residue is owing to private banks and in Germany. Discouraging as this picture of the financial situation of the country appears, it is not really so bad when the reverse side of the medal is concerned. As against the debt of 34 milliards of kronen, Hungarian citizens hold war loan, treasury bills, and bank notes to the value of 28-30 milliards of kronen. The debts contracted by Hungary abroad amount to no more than 1½ milliards of marks.

Hungary's debts are quite separate from those of Austria, excepting only the bank-note debts due to the Austro-Hungarian Bank. The settlement of this debt, or the exchange of the bank notes of the Austro-Hungarian Bank for those of the new Hungarian State Bank which it is intended to set up, can therefore be effected only by agreement with the States into which Austria has been broken up. The problem of redeeming the Hungarian war loans is independent of Austrian conditions: the only question will be that of apportioning their shares to the territories which will fall away from Hungary.

The new Hungarian Government has every intention of paying interest on the public debt is determined to assume full responsibility for the debts taken over from the old regime, and will do nothing to bring about depreciation.

In regard to the rate of exchange, the official view is optimistic, as it is expected that the trade of Hungary will show a balance on the right side. For some time, naturally, imports will have to be regulated and exports increased. The new Hungarian State Bank may also be expected to help in solving the problem of the exchanges.

FOREIGN TRADE.

TRADE FROM 1913 TO 1918.

Particulars of Austro-Hungarian foreign trade from 1913 to July, 1918, are now to hand and are shown in the appended table.

Year	Millions of Metric cwt.		Value in Millions of Kronen.	
	Imports.	Exports.	Imports.	Exports.
1913	230	118	3,509	2,988
1914	172	142	2,981	2,245
1915	137	97	3,850	1,426
1916	183	92	6,085	1,623
1917	159	72	4,405	1,515
1918 (Jan.-July inclusive)	91	38	2,253	843

The imports during the first seven months of 1918 included raw products to the value of 1,320 millions, among which were coal to the value of 369 millions, cattle to the value of 236 millions (i.e., more than 500,000 head), and corn to the value of 155 millions (i.e., altogether 3,900,000 metric cwt., or only one-third of the previous year's corn import). Exports during the same period included raw products to the value of 400 million kronen, mostly coal, Hungarian wine, mineral oil, and sugar. The largest items in the 1917 exports were ore (value 243 millions) and natural oils (value 154 millions).—(*Pester Lloyd*.)

GERMAN-AUSTRIA.

INHABITANTS AND CLASSIFICATION ACCORDING TO LANGUAGE.

According to the *Neue Freie Presse* the subjects of the new German-Austrian State number 10,299,092, of whom 5,914,151 are male, and 5,254,941 female. 9,268,616 speak German as their usual language, 347,520 Czech, 898 Polish, 210,748 Slovene, 34,915 Italian, and 18,596 other languages. The number of residents in German Austria who are not subjects of the new State is given as 417,799.

Customs Regulations and Tariff Changes.

BRITISH EMPIRE.

CANADA.

FURTHER INSTRUCTIONS RESPECTING THE IMPORTATION OF SEEDS.

In connection with the notice on page 754 of the "Board of Trade Journal" of 12th December, 1918, respecting the importation of seeds into the Dominion, in accordance with regulations contained in an Order-in-Council of 26th October, 1918 (Memorandum No. 2,250b), the Board of Trade have now received copy of Memorandum No. 2,257b, dated 22nd November, 1918, which has been issued by the Canadian Department of Customs, and which contains further approved instructions respecting such importation.

It is stated, in paragraph 1 of the present Memorandum, that as the primary object of the Order-in-Council of 26th October, 1918, is to prevent the importation of undesirable seed, and as it is desired that delivery of good seed be facilitated as much as possible, the authority given the Minister of Agriculture under Section 5 of the Order is hereby declared operative, under the Regulations contained in paragraphs 2, 3 and 4 of this Memorandum (see below).

Section 5 of the original Regulations states that under authority of the Minister of Agriculture, which may be withdrawn at any time, the collectors of Customs may deliver to consignees upon sampling, and without a bond, shipments of (a) clover or grass seed which are marked with a grade number in accordance with the provisions of the Seed Control Act, if a Canadian Government seed laboratory test number is given as authority for the grade; and (b) root and vegetable seeds which are apparently of strong vitality.]

The Regulations contained in paragraphs 2, 3 and 4 above referred to are as follows:—

2. Seed which may be delivered without Bond.

Grass and clover seed may be considered to be marked within the requirements of Section 5 of the Order in Council—

(a) When the grade and test number are given on the invoice, or

(b) When the consignee presents with the invoice a certificate of analysis from a Canadian Government seed laboratory with a written statement that the certificate was issued on a sample which represents the seed covered by the invoice, provided that the certificate shows the seed to be saleable in Canada.

Until notification is received to the contrary, shipments of root and vegetable seeds may be delivered without a bond to all consignees.

3. Entry Pending Drawing of Samples.

When circumstances require immediate delivery, it is permissible to clear from Customs shipments which are permitted entry under Section 5 of the Order in Council, prior to the taking of the samples, provided that the consignees arrange with the Customs Collector for a sample to be taken by the Customs Officer from each lot when it is unladen, and provided the unloading be done promptly.

4. Privilege of Delivery without Bond may be Withdrawn.

The privilege of securing delivery of seed without a bond, under the terms defined in paragraphs 1, 2 and 3, may be withdrawn from any firm or individual upon written notification to the Collector of Customs from the Seed Commissioner.

PROHIBITED EXPORTS.

The Board of Trade have received through the Colonial Office copy of an Order-in-Council of the 26th October, 1918, which has been issued by the Canadian Government, prohibiting the exportation of the following articles to all destinations, except under licence issued on the recommendation of the Canada Food Board, viz.:—

- Arrowroot;
- Cake made from wheat flour;
- Canned fruits;
- Chicle, gum;
- Gums, chewing;
- Honey;
- Jams, made from fruits;
- Jellies, edible;
- Malt sugar;

CUSTOMS REGULATIONS AND TARIFF CHANGES—
continued.

Maltodextrine;
Mustard;
Pea flour and meal;
Pickles;
Prepared food (wholly or partially derived from cereals);
Prepared coffee;
Prepared cocoa;
Rennet powder (rennet extract and preparations of rennet);
Semolina;
Sugar beets;
Vinegar.

**RESTRICTIONS ON IMPORTATION OF
MOTOR PARTS MODIFIED.**

The Board of Trade have received from His Majesty's Trade Commissioner, Montreal, particulars of amended decisions by the Canadian War Trade Board, regarding the restrictions on the importation of motor parts into the Dominion.

By an Order-in-Council of 3rd June, 1918, the importation into Canada of automobiles valued at 1,200 dols. and upwards at place of manufacture was prohibited, except under licence by the War Trade Board. A memorandum of the Department of Customs (No. 2237 B) issued on 10th September, 1918, declared that this prohibition also applied to the body and chassis of automobiles when the body or chassis, together with the usual parts required to complete the automobile, amounted to 1,200 dols. or upwards, f.o.b. at place of export.

Regarding these restrictions on the importation of automobiles, bodies and chassis, the War Trade Board has decided that where an automobile body is for use on a chassis imported into Canada prior to 16th June, 1918, upon proper evidence being submitted of the facts, licence for importation will be recommended.

Furthermore, the War Trade Board will be disposed to recommend import licence for bodies or other parts of cars not obtainable in Canada, which are an essential requirement for the production of automobiles by bona-fide manufacturers of automobiles in Canada.

FOREIGN.

FRANCE (Algeria).

MUNICIPAL OCTROI DE MER TARIFF

The "Journal Officiel" (Paris) for the 26th December last contains a Presidential Decree, dated the 6th December, providing that, as from the 1st January, 1919, to the 31st December, 1923, inclusive, the municipal *octroi de mer* duties in Algeria are to be levied in accordance with the Tariff annexed to the Decree. The Tariff is as follows:—

	Rate of duty.	
	Frs.	cts.
	per 100 kilogs.	
Coffee	40	00
Chicory root, prepared, or other coffee substitutes	10	00
Glucose	10	25
Sugar, raw, destined for refining (per 100 kilogs. expressed in refined sugar)	25	00
Sugar, refined or loaf (effective net weight)	25	00
Sugar, raw, for immediate consumption (effective net weight)	25	00
Sugar candy (effective net weight)	25	00
Tea	25	00
Pepper	50	00
"Poirrels," grey residues and other imitations of pepper containing pepper or not	50	00
Chestnuts, horse chestnuts, and chestnut meal	5	00
Cinnamon and cassia lignea	45	00
Nutmegs, mace and vanilla	100	00
Cloves and clove stalks	40	00
Mineral oils	5	00
	Per hectolitre.	
Alcohol pure, contained in brandies and spirits in casks, brandies and spirits in bottles, liqueurs and brandied fruits—with a minimum standard of 30 degrees for bitters and other aperitive liquors with an alcoholic base	50	00
Alcohol pure, contained in raisin wines, artificial wines and alcoholic liquids produced from the fermentation of figs, locust beans, dates, grain, and all other sacchariferous or similar substances other than grapes, apples, pears or honey	50	00

CUSTOMS REGULATIONS AND TARIFF CHANGES—
continued.

	Rate of duty.	
	Frs.	cts.
	Per hectolitre.	
Alcohol, pure, contained in composition wines or fortified wines and "mistelle"—with a minimum standard of 15 degrees for "mistelle," other than for the manufacture of vermouth, cinchona and similar wines	50	00
Alcohol, pure, contained in vermouth or liqueurs—with a minimum standard of 15 degrees for liqueurs properly so-called, and of 16 degrees for vermouth, cinchona and similar wines	50	00
Alcohol, pure, exceeding 15 degrees, 9 contained in wines	50	00
Alcohol, pure, contained in alcoholic distilled waters, alcoholic perfumery, and all other products containing an admixture of alcohol	50	00
Beers	5	00

Note.—The "Octroi de mer" is a special tax levied in Algeria, independently of the Customs duties, on goods of any origin imported by sea or land. The same tax is levied on similar goods of Algerian production or manufacture.

UNITED STATES OF AMERICA.

**ANNOUNCEMENT OF POLICY AS TO
RELAXATION OF IMPORT
RESTRICTIONS.**

In Ruling No. 406, dated the 14th December, the War Trade Board announced that the following policy has been determined upon in the relaxation of restrictions upon imports. All announcements of relaxations will relate only to shipments made from the country of origin after the date of the announcement, and will not validate in any manner shipments made prior to such time in violation of the import restrictions. The War Trade Board will take up separately on its own merits each case of shipment made in violation of the regulations, and will permit entry, if entry is permitted at all, only under such conditions as will, according to the particular circumstances of each case, do justice to importers who have obeyed the regulations, by preventing those who have not from obtaining any discriminatory advantage as a result of such shipments.

In regard to the large shipments of restricted articles which have been made to Canada during the time the restrictions were effective, the War Trade Board announce that the relaxations will not authorise the licensing of such shipments. The policy will be against licensing such shipments until the lapse of a very considerable interval after the lifting of the restriction upon importation from the country of origin. The purpose is to allow ample time to importers who have obeyed both the letter and the spirit of the regulations to complete shipments from the country of origin before any consideration is given those who attempted to circumvent the restrictions by making shipments into Canada. It is the purpose of the War Trade Board throughout to prevent the accrual of any unfair advantage to importers who have disregarded either the letter or the spirit of the regulations over those importers who have co-operated patriotically with the War Trade Board by yielding scrupulous obedience to the import restrictions and assisting in accomplishing the objects of the restrictions.

**OFFICIAL CABLING OF IMPORT LICENCE
NUMBERS NO LONGER REQUIRED.**

The War Trade Board of the United States announced on 18th December that the instructions contained in War Trade Board Ruling 234*, issued 18th September, 1918, have been revoked and that Consuls have been instructed to certify invoices without official notification from the War Trade Board, upon production of a letter or cablegram from the consignee, giving the import licence number, commodity and quantity thereof licensed. All official notifications of licence numbers previously cabled or mailed to Consuls by the War Trade Board are still effective, and Consuls will continue to certify invoices thereunder. The present ruling does not affect in any manner General or "PBB" Licences, nor shipments of coffee, sugar, or nitrate of soda, for which the regulations do not require that licence numbers be cabled. Shipping companies will be required to return at their own expense all shipments not covered by Consular invoices, where invoices are required under the State Department's regulations. (Ruling No. 409.)

*Refer in this connection to the notices in the "Board of Trade Journal" for the 10th October, 1918 (pp. 471-472), the 7th November, 1918 (p. 596), and the 2nd January, 1919 (p. 19).

CUSTOMS REGULATIONS AND TARIFF CHANGES—
continued.

IMPORT RESTRICTIONS ON RUBBER REMOVED

In Ruling No. 414, dated the 14th December, the War Trade Board announced that all restrictions upon the quantity of crude rubber which may be imported from overseas have been removed. Applications for licences to import this commodity would be considered without limit as to the quantity.

It was also announced that the War Trade Board have withdrawn the Government option price, and will require no further undertaking relative to maximum values.

Careful consideration had been given to the advisability of eliminating the requirement of guarantees, but it had been found necessary to require these undertakings for the present.

This relaxation, however, will not authorise the importation of any shipments of rubber from any country other than the country of origin. Applications for import licences for such shipments will not be considered until after 13th February, 1919. The same policy will be applied to applications for licences to import shipments of rubber already in the United States, which have been made in violation of the import restriction regulations.

VARIOUS RULINGS CONCERNING IMPORT RESTRICTIONS.

Tanning materials and quebracho wood.—Applications will be considered for licences to import tanning materials and tanning extracts, except quebracho wood, in an amount not to exceed 12,000 tons per month from 30th November, 1918 to 30th June, 1919. The import of quebracho wood coming from the River Plate District may be licensed in an amount not to exceed 6,000 tons per month over the above-mentioned period. Allocation will be made by the War Trade Board in both cases (Ruling No. 378).

Corundum ore and grains.—Applications for licences to import corundum ore and grains will now be given consideration without limitation as to quantity. The Ruling of 1st October, 1918 (No. 261), providing for licensing the import from England of 450 tons of finished grains of corundum has been revoked (Ruling No. 397).

Rattans and reeds; latch knitting needles; asphalt; animal hair; canary seed; asbestos; honey; Brazil nuts, and shelled walnuts.—The special import restrictions on these commodities have been removed; and applications for import licences will be considered (Rulings Nos. 387, 388, 399, 400, 402, 415 and 420).

EXPORT OF MANUFACTURES CONTAINING GOLD.

The Regulations, noted at page 756 of the "Board of Trade Journal" for the 12th December, on the above subject were modified in certain respects by a Ruling of the War Trade Board (No. 370), dated the 14th December. A copy of the new Ruling, No. 370, may be seen by persons interested, on application, at the Department of Overseas Trade.

THE REVISED "CONSERVATION LIST."

On 13th December last the War Trade Board announced the issue of a special export licence, No. "R.A.C.-63," authorising the exportation from the United States, without individual export licence, of any commodity destined to the United Kingdom, France, Italy, or Japan, their Colonies, Possessions, or Protectorates, except those articles included in the Export "Conservation List" as it then stood, or as it might be amended later from time to time (cf. the notice at page 18 of last week's issue of the "Board of Trade Journal").

From information which has now been received, through the Foreign Office, from His Majesty's Embassy at Washington, it appears that the principal commodities still included in the "Conservation List" on 1st January, and for which individual export licences continue to be required, are as follows:

Apples, dried; arms and ammunition; beans, dried; beet and products thereof; camphor; chestnut and quebracho extracts; cinchona bark and extracts; coal and coke; coffee; copra; explosives; foddors; flour of all kinds; glucose; grain, all kinds; jute and manufactures thereof; lard of all kinds; meal of all kinds; milk; oils of following kinds, coconut, copra, cotton seed, olive, palm, peanut, soya; paper, print and newsprint; peaches, dried; peas, dried; pork and products thereof; prunes, seeds, garden, vegetable and clover; sugar.

Government Notices
affecting Trade.

EXPORT AND IMPORT SECTION.

RELAXATION OF EXPORT PROHIBITIONS.

The Board of Trade announce that the following relaxation of the existing prohibitions of export will be brought into force as from to-day. Further relaxations will be announced in subsequent issues of the "Journal."

A. EXPORT PROHIBITIONS.

The following is a list of the articles affected and of the changes made in the nature of the prohibitions applicable to each. In explanation of the changes it should be noted that goods on List A are prohibited to all destinations, and goods on List B to all destinations outside the British Empire, while goods on List C are prohibited only to countries neighbouring enemy countries.*

It will of course be understood that the existing position regarding trading with enemy countries is in no way affected by these modifications.

[NOTE.—Attention is called to the fact that by the Proclamation of the 1st October, 1918, all goods, whether mentioned by name or not (except printed matter and accompanied personal effects) are prohibited on List C.]

HEADINGS TRANSFERRED FROM ONE LIST TO ANOTHER

Heading.	From List.	To List.
Axes	A	C
Beeswax	A	C
Boiler tubes	A	B
Bottles, metal, such as can be used for containing mercury	A	C
Carborundum, alundum, crystalon, and all other artificial abrasives and manufactures thereof	A	C
Copper manufactures, the following:—Bars, circles, plates, rods, sheets, strips, tubes, manufactured of copper or its alloys ...	B	C
Chisellets	A	C
Implement and apparatus designed exclusively for the manufacture of munitions of war, for the manufacture or repair of arms or of war material for use on land or sea, the following:—		
Cordite presses; dies for cartridge cases; gauges for cartridges or shells; incorporators; lapping machines; rifling machines; wire-winding machines	A	C
Insulating materials, the following:—		
Oiled insulating cloth, paper, silk and tape	B	C
Vulcanised fibre	B	C
Iron pipes, wrought	A	B
Iron tubes	A	B
Jute cordage and twine	B	C
Jute padding	B	C
Jute, piece goods made wholly or partly of ...	B	C
Jute twist	B	C
Jute webbing	B	C
Lacs, not including lac dye	A	C
Lubricants not otherwise specifically prohibited and articles and mixtures containing such lubricants	A	C
Magnets and component parts thereof	B	C
Mineral jellies	A	C
Motor spirit	A	C
Oil fuel	A	C
Oil fuel shale	A	C
Osmium and its alloys and manufactures containing osmium	B	C
Paraffin oil	A	C
Petroleum fuel oil	A	C
Petroleum gas oil	A	C
Petroleum lighting oil	A	C
Petroleum spirit and articles containing petroleum spirit	A	C
Petroleum and its products not otherwise specifically prohibited and mixtures thereof	A	C
Rhodium and its alloys and manufactures containing rhodium	B	C

*All Destinations in European and Asiatic Russia and in other Foreign Countries in Europe and on the Mediterranean, except France and French Possessions, Italy and Italian Possessions, Belgium, Portugal, Greece, Spain and Morocco, Palestine and Syria, as far north as a line from Alexandria to Aleppo inclusive, and as far East as the Hejaz railway inclusive, and to all ports in any such foreign countries.

GOVERNMENT NOTICES AFFECTING TRADE—*continued*

HEADINGS TRANSFERRED FROM ONE LIST TO ANOTHER.

Heading.	From List.	To List.
Ruthenium and its alloys and manufactures containing ruthenium	F	C
Sausage skins	A	C
The List A prohibition on hog casings remains unaltered.		
Steel tubes	A	B
Tin, manufactures of not otherwise specifically prohibited	B	C
Turpentine oil and spirits and articles containing turpentine	A	C
Turpentine substitute and articles containing turpentine substitute	A	C
Wood screws, made of iron or steel	A	C
X-ray apparatus	A	C
CHEMICALS.		
Acetic acid	A	C
Acetic anhydride	A	C
Acetylsalicylic acid (aspirin) and its preparations	A	C
Anti-tetanus serum	A	C
Arecoline	A	C
Buchu leaves	A	C
Calcium carbide	A	C
Calumba root	A	C
Carbon disulphide	B	C
Cascara sagrada and its preparations	A	C
Chlorates, metallic, other than potassium chlorate (which remains on List A)	B	C
Culvers root	A	C
Formic acid	A	C
Formic aldehyde	A	C
Hydrastis canadensis and hydrastine	A	C
Liquorice root and juice	A	C
Male fern rhizome	A	C
Mannite	A	C
Paraformaldehyde	A	C
Podophyllum rhizome	A	C
Rhubarb, medicinal	B	C
Sassafras root	A	C
Scammony root	A	C
Senega root	A	C
Trional	A	C
Trioxymethylene	A	C
Valerian rhizome	A	C
Witch hazel bark and leaves	A	C
Zinc oxide and mixtures containing zinc oxide	A	C

HEADINGS ALTERED.

Delete.	Substitute.
(B) Bags and sacks made wholly or partly of jute other than such bags or sacks as constitute the coverings of goods to be shipped for exportation and are allowed by the Commissioners of Customs and Excise to be shipped as such coverings.	(B) Nitrate bags. (C) Bags and sacks not otherwise prohibited.
(A) Bristles.	(B) Bristles of European origin. (C) Bristles not otherwise prohibited.
(B) Henbane and its preparations.	(B) Henbane. (C) Preparations of henbane not otherwise prohibited.
(A) Oils, fixed, all animal and vegetable and articles and mixtures containing such oils, except india-rubber substitute and oil varnish.	(A) Oils, fixed, all animal and vegetable, including blended oils and paint oils. (C) Articles and mixtures containing fixed oils, not otherwise specifically prohibited.
(A) Potash, muriate, nitrate (saltpetre), sulphate and crude manurial potash salts, and mixtures containing any of these substances.	(A) Potash, muriate, sulphate and crude manurial potash salts, and mixtures containing any of these substances. (C) Potash nitrate (saltpetre).
(A) Tin, oxide of, and mixtures and preparations containing tin oxide.	(A) Tin, oxide of. (C) Mixtures and preparations containing tin oxide not otherwise prohibited.
(A) Zinc sulphide, and mixtures containing zinc sulphide.	(A) Zinc sulphide. (C) Mixtures containing zinc sulphide not otherwise prohibited.

NOTE.

With reference to the list of chemists notified in the "Board of Trade Journal" of the 19th December, 1918, as transferred to List C, it is to be noted that the term "catechu" is intended to apply only to the pharmaceutical product known as catechu, and not to any tanning materials.

GOVERNMENT NOTICES AFFECTING TRADE—*continued*

GENERAL LICENCES FOR EXPORTS.

The Director of the War Trade Department announces that an open general licence has been issued permitting the exportation to all destinations except European or Asiatic Russia and other foreign destinations in Europe or on the Mediterranean Sea, other than France and French Possessions, Italy and Italian possessions, Belgium, Portugal, Spain, Greece, and Morocco, of the under-mentioned goods, that is to say:—

1. Boilers and their component parts.
2. Cement for building and engineering purposes.
3. Iron and steel bridgework, pierwork, and structural material (*i.e.*, "fabricated" material).
4. Mixtures containing lead compounds not exceeding twenty per cent. metallic lead.
5. Elpiman's Embrocation.
6. Gloy.
7. Gum, liquid office, being a solution of gum arabic in water.
8. Oil varnish.

Applications to the War Trade Department will in future not be required in respect of any of these goods when it is desired to export them to destinations other than those specified.

BELGIAN IMPORT LICENCES.

The Commission Belge de Ravitaillement, (Canada House, Kingsway, announce that the "Ministère belge de l'Industrie, du Travail et du Ravitaillement," 4, rue Lambertmont, Brussels, is permitted to issue licences for import into Belgium of the following goods:—

- Foodstuffs.
- Finished articles of clothing.
- Finished footwear.
- Tobacco (raw or manufactured).

In order to obtain these licences importers must apply to the Minister of Industry at the above address.

IMPORTS INTO BELGIUM NOT REQUIRING LICENCE.

The following goods may be imported into Belgium without licence of import:—

- Fish of all kinds, fruit of all kinds, cheese, eggs, butter, milk, soap, coffee, spices, edible oils, rice, alimentary pastes.

FINANCING OF EXPORTS.

The Minister of Blockade (the Rt. Hon. Sir L. Worthington-Evans) announces, under date of 1st January, that a notice is being sent to bankers relieving them of formalities required before financing exports from this country to neutral European countries.

All the restrictions and returns rendered necessary by the war are being reviewed by the Finance Section of the Ministry of Blockade, with a view to further simplification.

EXPORTS TO SWITZERLAND.

1. The Director of the War Trade Department announces that an open general licence has been issued permitting the export to Switzerland of the goods which are specified in the first part of the Schedule hereto.

Applications for specific licences in respect of these goods are not now required, and it is not necessary for any of them to be consigned to the Société Suisse de Surveillance Economique.

FIRST PART.

- Adding and calculating machines.
- Alabaster for statuary purposes.
- Bicycles, but not tyres
- Spanners.
- Buttons of all kinds.
- Celluloid wares.
- China clay.
- Dental bars.
- Dental filling materials.
- Drugs, etc., the following:—
Arsenobillon.
Arsenous acid.
Cacodylate.
Chronic acid.
Eneaine.
Paraldehyde
Phenacetin.
Salicylic acid.
Sodium arsenate.

GOVERNMENT NOTICES AFFECTING TRADE—continued

Duplicating machinery and supplies therefor.
 Electro-plated, gilded or silvered goods, except those of solid silver or gold.
 Feathers, made up.
 Films, printed, positive or negative.
 Flower seeds, except seeds of oil-bearing plants.
 Furs, dressed, dyed or manufactured.
 Hair nets or silk or hair.
 Hats of all kinds.
 Jewellery, imitation.
 Laces and guipure.
 Laundry machinery.
 Marble, raw and manufactured.
 Morocco leather, small fancy goods, and all imitation leather goods.
 Phonographic records.
 Photographic goods, but not chemicals therefor.
 Printing presses.
 Ribbons, silk.
 Screw spanners for cycles.
 Sewing machines for domestic use.
 Spectacles.
 Trimmings of silk.
 Type-setting and type-casting machinery, excluding type metal.

2. In the case of the goods specified in the Second Part of the Schedule hereto, licences are still required, but consignment to the S.S.S. and production of S.S.S. Certificates are not necessary.

SECOND PART.

Aconite, preparations and alkaloids.
 Amidopyrine.
 Benzenaphthol.
 Essential oils.
 Fructus tocmehi.
 Hydrobromic acid.
 Liqueurs.
 Nitrate of silver.
 Opium, preparations and alkaloids.
 Sodium bromide.
 Sodium nitroprusside.
 Typewriters.
 Wines.

SAMPLES.

3. Arrangements have been made for Certificates to be issued by Chambers of Commerce in respect of the export of samples of goods to Switzerland. This notification takes the place of paragraph 7 of the notice which appeared on pages 624-6 of the "Board of Trade Journal" of the 14th November, 1918.

NOTE.—The notice referred to above was entitled "Export of Samples of Prohibited Goods," and described the arrangements which had been made to facilitate their export without Privy Council licence. The paragraph 7 which has now been superseded ran as follows:—"These arrangements do not apply to the export of samples destined for Switzerland; and Privy Council licences must be obtained for all samples which are to be despatched to that country otherwise than by the sample post."

EXPORT LICENCES FOR CERTAIN LEATHERS.

The Director of the War Trade Department announces that applications for export licences will now receive consideration in approved cases in respect of the following goods:—

- (1) Enamelled and Japanned Leather produced from Split Hides and Fleeces.
- (2) Dressed Harness Leather.

DIAMOND EXPORT COMMITTEE.

The Director of the War Trade Department announces that the meetings heretofore held by the Diamond Export Committee have now been discontinued.

EXPORT OF FOODSTUFFS TO WEST AFRICAN COLONIES.

The Director of the War Trade Department announces that the arrangements whereby the West African Colonies have recently obtained their supplies of imported Foodstuffs from the United States of America have been cancelled, and the export of necessary Foodstuffs will be allowed from the United Kingdom as from the 1st January, 1919. It will not be necessary in future for merchants to have their orders for Foodstuffs certified by the West African Governments as heretofore. It may, however, be necessary, owing to Home shortage, to restrict or refuse the export of certain Foodstuffs for the present.

GOVERNMENT NOTICES AFFECTING TRADE—continued.**EXPORT OF NORWEGIAN BRISLING AND MOUSSE.**

The Director of the War Trade Department announces that he is prepared to consider favourably any applications which may be made to export Norwegian Brisling and Mousse to approved destinations.

EXPORT OF PICKLED HORSE FLESH.

The Director of the War Trade Department announces that he is prepared to consider favourably any applications which may be made to export Pickled Horse Flesh to approved destinations.

FORMALDEHYDE.

All restrictions on the sale and purchase of Formaldehyde have been removed by the Government of the United States, and free export as in pre-war times is permitted as from the 1st January, 1919.

The Army Council give notice that further consignments of this chemical will not be requisitioned on arrival, and that the Formaldehyde (Dealings) Order of the 8th July, 1918, fixing prices, will be cancelled as from the 1st March, 1919.

REMOVAL OF RESTRICTIONS ON CERTAIN CONSIGNEES IN THE ARGENTINE, PARAGUAY AND URUGUAY.

The Controller of the Foreign Trade Department announces that the Secretary of State for Foreign Affairs has withdrawn, as from 1st February next, the restrictions which have been in force against certain Turkish and other firms in the Argentine, Paraguay, and Uruguay, whereby these firms were required to furnish guarantees to be legalised by H.M. Consular Officers in order to enable them to import goods from the United Kingdom.

This does not in any way relieve merchants in this country from obtaining export licences wherever necessary, and from satisfying themselves that their consignees are not included in the Statutory List or are otherwise objectionable.

STATUTORY LIST.**AMENDMENTS TO LIST OF FIRMS IN FOREIGN COUNTRIES WITH WHOM TRADING IS PROHIBITED.**

An Order of Council, dated 3rd January, amends in the following respects the Statutory List of persons and bodies of persons with whom trading is prohibited:—

SCHEDULE.**ADDITION TO LIST.****Morocco.**

Manzano, Francisco, Ceuta.

REMOVALS FROM LIST**CHILE.**

Polanco, Julio U., Valparaiso.
 Trillo, Victor, Antofagasta.
 Tschumi and Company, Huertanos, Espada Estado, Santiago.
 Wiegand and Company, Valparaiso and Huasco.

DENMARK.

Revisions and Forvaltnings Institutet A/S, Frederiksberg-gade 13, Copenhagen.
 Revisionsbanken i Kjobenhavn A/S, Frederiksberggade 13, Kongens Nytorv 8, Gammel Kongevej 122, Nørrebro 155, and Amagerbrog, 110, Copenhagen.

ECUADOR.

Arce, M. Pedro Pablo, Guayaquil.
 Cueva, Teofilo Vivar, Quito.
 Reira, Martin, Guayaquil.
 Sierra, José, Guayaquil.

GUATEMALA.

Wong, Eugenio, and Company, Guatemala City

HAYTI.

Dambreville, H., Petit Goave, Hayti.
 Dehoux, L., Petit Goave, Hayti.

LIBERIA.

Genzalez, Justo.

MEXICO.

Caamano, Nicolas (La Prensa del Dia), Orizaba.

GOVERNMENT NOTICES AFFECTING TRADE—continued.

Cavasos, Manual, Jr., Nuevo Laredo.
 Cavasos, Manuel, Sr., Nuevo Laredo.
 Coppel, Isaac, Mazatlan.
 Linus, Eduardo, Chihuahua.
 Prensa del Dia, La. (See Caamano, Nicolas)

SWEDEN.

Industri Banken A. B., Olof Wijksg. 3, Gothenburg.
 Svenska Finans Institutet A/B., Drottningg. 33, Gothenburg; and Arsenalg. 14, Stockholm.
 Vardetoraltng, A. B., Gothenburg.

VENEZUELA.

Urdaneta, Ezekiel, Trujillo

VARIATIONS IN LIST.

Corrections in the names and additions to addresses of the persons or firms whose names have been already published on the respective dates shown in the margin are made as under:—

ARGENTINA.

13th April, 1917. Fadum and Company, Calle San Martin 1845-89, Mendoza, Argentina, *should read*
 Fadum and Company, Calle Francisco Cavit 91-99, Mendoza, Argentina.

MOROCCO.

5th Jan., 1917. Gumpert, Francisco, Tangier, *should read*
 Gumpert, Francisco ("Paco"), Tangier, Tetuan and Rio Martin.

5th Jan., 1917. Gumpert, Luis, Tangier, *should read*
 Gumpert, Luis, Tangier, Tetuan and Rio Martin.

SPAIN.

1st Feb., 1918. Rodriguez Torres, Agustin, Las Palmas (no connection with Agustin Torres, Barcelona), *should read*

Rodriguez Torres, Agustin, Las Palmas (no connection with Agustin Torres, Barcelona, or with Antonio Rodriguez (or Rodriguez Torres), Las Palmas).

RECONSTRUCTION SECTION.

IRON AND STEEL STOCKS.

In the announcement of 2nd December relating to the prices of Iron and Steel (which was published in the "Journal" of 5th January), it was stated:—

1. That the powers of the Ministry of Munitions would be used to prevent any undue hoarding of subsidised material in anticipation of a subsequent rise in price, and
2. That during the period of subsidy, distribution of cheap material should be made on an equitable basis.

After discussion with the industries concerned, the Ministry of Munitions has now made the following arrangements in those two respects:—

1. As regards stocks of Iron and Steel held by makers, stockholders or other persons dealing in or being consumers of Iron or Steel, it is considered reasonable that stocks should be restored to a normal level out of subsidised material. It is therefore proposed that such persons should be permitted, without any claim by the Ministry for repayment of subsidies, to replenish their stocks up to a total not exceeding 100 tons above the amount held by them on 31st October, 1915 (being a date prior to the period of control), or 31st October, 1918 (being a date approximating to the conclusion of hostilities), whichever amount may be the greater. On any excess, however, beyond these quantities free of rebate, each person will be required to pay to the Ministry of Munitions a sum per ton, to be announced at an early date, in respect of the subsidies on any such excess held by him as at 30th April, 1919.

In order to carry out this scheme an Order will shortly be issued requiring all persons holding on the 30th April, 1919, 100 tons or more of Iron and Steel, or either of them, to make a return to the Ministry of Munitions of their stocks (a) at 31st October, 1915, or 31st October, 1918 (whichever may be the greater); (b) at 30th April, 1919. This return will be subject to verification by the firm's auditors or by the accountants of the Ministry of Munitions, and will be in accordance with a form shortly to be issued. This form will be as simple as possible, and will exclude special classes of Iron and Steel which are not subject to subsidy.

GOVERNMENT NOTICES AFFECTING TRADE—continued.

All Iron and Steel not actually incorporated in any building structure or work in progress will be regarded as stock to which the above applies.

The Order will further contain provisions for securing payment to the Ministry of Munitions of the sums above mentioned in respect of any excess stock held on the 30th April, 1919.

2. In order to secure equity of distribution of Iron and Steel the Minister of Munitions invites any Trade Association or individual consumers who may have reason to complain of difficulty in obtaining supplies of Iron or Steel, to seek the assistance of the Secretary of the Area Committee of their locality. Such complaints will be dealt with by the Area Committee and, if necessary, representatives of the industry or firms concerned will be invited to attend a special meeting of the Committee. Appeal may, if desired, be made to the Central Steel Committee of the Ministry of Munitions.

The names and addresses of the Secretaries are as follows: Scotland.—G. W. Langford, 105, West George Street, Glasgow.

N.E. Coast.—W. E. Bowles, North-Eastern Bank Chambers, Middlesbrough.

South Wales.—Henry Clement, 25-29, Royal Metal Exchange, Swansea.

Midlands.—D. J. Suter, Phoenix Buildings, Colmore Row, Birmingham.

Sheffield.—N. Thomas, Angel Hotel, Angel Street, Sheffield.

Manchester (including N. Wales and N.W. Coast).—G. Throssel, Victoria Buildings, 81, Mary's Gate, Manchester.

Consumers in London or localities outside the above Iron and Steel areas should communicate direct with the Secretary, Central Steel Committee, Ministry of Munitions.

STEEL AND IRON (PURCHASE AND RETURNS) ORDER, 1919.

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

1. As from the date hereof until further notice the Steel Supplies (Metallurgical Coke, Iron and Steel) Permit, 1916, issued by the Minister of Munitions, dated the 1st November, 1916, as varied by subsequent notices, shall take effect as if the following condition were incorporated among the conditions therein contained, namely,

On and after the seventh January, 1919, until further notice, no purchase shall be made or delivery taken of Iron or Steel by any person holding at the date of such purchase any stock of Iron and Steel, or either of them, exceeding by more than 100 tons the amount of such stock held by him on the 31st October, 1915, or the 31st October, 1918, whichever shall be the greater amount, except under and in accordance with a special permit from the Minister of Munitions, which will only be granted on the condition of the permit holder repaying to the Minister of Munitions certain subsidies in respect of all such stock held by such permit holder on the 30th April, 1919, which may be so in excess as above mentioned.

2. All persons who shall on the 30th April, 1919, hold a stock of Iron and Steel, or either of them, of 100 tons or more shall, within fourteen days after the 30th April, 1919, furnish to the Controller of Iron and Steel Production, Ministry of Munitions, London, a true and complete return of the stock of Iron and Steel held by them (a) on the 31st October, 1915, or the 31st October, 1918, whichever shall be the greater (b) on the 30th April, 1919, on a form which may be obtained on application to the Controller at the above address.

3. All Iron and Steel not actually incorporated in any building or structure or work in progress shall, for the purposes of this Order and the condition above mentioned, be deemed to be stock, and the Iron and Steel referred to shall not include scrap.

4. This Order may be cited as the Steel and Iron (Purchase and Returns) Order, 1919.

Note.—The Steel and Iron (Purchase and Returns) Order of 7th January, 1919, requiring a permit for the purchase of Iron and Steel which may be put into stock during the period of subsidies, is not intended, and will not be used by the Ministry, to control or in any way fetter the freedom of the market in Iron and Steel products. All persons applying to the Controller of Iron and Steel production at the Ministry of Munitions will automatically be granted a permit, subject only to acceptance of the condition that they will pay the Ministry a rebate of subsidies in the event of stocks being accumulated on 1st May in excess of the amount defined in the Order. It is suggested that all persons whose stocks are

GOVERNMENT NOTICES AFFECTING TRADE—continued

likely, during this period, to exceed 100 tons, should at once, and without regard to their immediate operations, apply to the Ministry and have their names included on the list of those licensed to deal during the subsidy period, without restriction.

STANDARD CIVILIAN FLANNEL.

In order to provide a more varied assortment of Standard Civilian Flannel, the Director of Wool Textile Production has arranged for three qualities. The available quantity of "A" is limited.

	Retail selling price. Per yard
	s. d.
Quality "A"	2 6
Quality "B"	2 9
Quality "C"	3 6

Plain colours and stripes may be purchased in each quality.

Shirts manufactured from these cloths will be on sale to the public at the following prices.—

	Each. s. d.
Quality "A"	11 6
Quality "B"	12 3
Quality "C"	14 11

The retailing selling price will be ticketed on pieces at least every three yards. Each shirt will have the Government price label attached.

SOLE LEATHER (CONDITIONS OF SALE)—AMENDMENT.

The Army Council have made an Order, dated 2nd January, amending the Sole Leather (Conditions of Sale) Orders, 1917 and 1918. Under the new Order English Sole Leather previously controlled, except certain classes still required for military purposes, is released for civilian purposes, and the quantity of such leather which may be purchased by any individual from one source in seven consecutive days is extended from 500 to 1,000 Bends, and from five to ten tons of Shoulders and Bellies. Details have been communicated to the trade concerned.

RATIONING COMMITTEE DISBANDED.

With the general release from Government control of raw materials used in industry, the necessity for rationing disappears, and the Civil Industries Committee, through whom that rationing has been exercised, is now to be disbanded.

The Committee was appointed by Dr. Addison, then Minister of Munitions, in February, 1917, under the name of the Priority Advisory Committee. Its duties were to investigate the claims of industries threatened with hardship or extinction, owing to the shortage of raw materials, and to make arrangements whereby they might at least be kept alive, even if not maintained, at their former level. The Committee comprised some Departmental Officials, but was composed mainly of business men of such standing as to give to the traders of the country a feeling of confidence that their interests would be safeguarded. The Chairman was Mr. John Wormald, of Mather and Platt, Ltd., Engineers, Manchester, and his fellow members were:—

- Mr. G. E. Alexander, Chairman United Glass Bottle Manufacturers' Association
- Mr. Kenneth M. Chance, British Cyanides, Ltd., Birmingham.
- Sir Archibald Denny, Bart., Wm. Denny and Bros., Ltd., Shipbuilders, Dumbarton.
- Mr. Alexander Walker, John Walker and Sons, Ltd., Kilmarnock.
- Mr. Murray Walker, Walker Bros., Ltd., East India and South African Merchants.
- Mr. Henry Woodall, Director, Gas Light and Coke Co.

The Committee was housed at the headquarters of the Priority Department of the Ministry of Munitions until December, 1917, when it was constituted a Sub-Committee of the War Priority Committee and transferred to 11, Pall Mall.

In full accord with the Controller of Priority, the Committee from the beginning undertook the rationing of manufacturers already grouped together in trade associations or capable of being grouped. It investigated the affairs of 91 trades, in 78 of which a rationing system was established. Though its work was largely dependent upon supplies of metals, it dealt also with the rationing of chemicals, oils, fats, the last-named in co-operation with the Ministry of Food. In addition, the Committee, from time to time, by arrangement with the Minister of Recon-

GOVERNMENT NOTICES AFFECTING TRADE—continued.

struction, investigated claims made to him for materials, plant, and machinery required in preparation for the resumption of peace-time work or for the starting of new industries.

From the outset the Committee worked on the principle of winning the co-operation of the traders themselves. No decisions were made without consultation with representatives of the industries concerned, and the meetings between the two sides were full and frank. The Committee originated the system of appointing, as official rationing authorities, independent persons of high standing, chiefly firms of Chartered Accountants. This system has worked to the satisfaction of the traders rationed. To assure that the supplies of raw materials should be forthcoming the Committee worked in closest touch with various Government Departments. A close liaison has also been maintained with the War Trade Department for the purpose of correlating manufacture to export.

NON-FERROUS MATERIALS.

In order that the Trade may know the position in regard to stocks of the important metals, the following particulars are published of the stocks (exclusive of old metals and scrap) in this country in the possession of the Minister of Munitions, on 1st January, 1919:—

	Tons.		Tons.
Copper	36,000	Soft Pig Lead	62,852
Spelter, G.O.B.	22,273	Nickel	2,096
Spelter, Refined ...	8,017	Antimony Regulns	3,508
Aluminium	11,957		

It is intended to publish at monthly intervals the stocks held on the first day of each month.

In addition to the above the Minister holds large quantities of scrap, mainly brass, of which it is impossible to give any particulars at present.

DEMOBILISATION SECTION.**EMPLOYMENT OF DISABLED OFFICERS IN INDIA AND FEDERATED MALAY STATES**

The Secretary of State for India wishes to make it known that the Committee instituted at the India Office, with the concurrence of the Secretary of State for the Colonies, to assist disabled and invalided officers to obtain employment in India, the Eastern Colonies and Malay States, has ceased its operations.

Applicants and Employers should in future address the "Appointments Department," Ministry of Labour, Gresham House, Old Broad Street, E.C.2, which has formed a Directorate covering the ground hitherto dealt with by the Committee.

GOVERNMENT EMIGRATION COMMITTEE.

In view of the need for creating machinery to enable His Majesty's Government to deal effectively with the problems connected with emigration which are likely to arise during the period of reconstruction, the Secretary of State for the Colonies has appointed a Committee which will be known as the Government Emigration Committee. The Committee, which will be under the presidency of the Secretary of State, is composed as follows:—

The Parliamentary Under-Secretary of State for the Colonies, Chairman; Mr. T. C. Macnaghten, C.B.E., Colonial Office, Vice-Chairman; Mr. J. Ambrose, Sir Alan Anderson, K.B.E., Mr. G. E. Baker, Board of Trade, The Lord Burnham, K.C.V.O., Brig.-General C. de Samarez, C.M.G., D.S.O., War Office, Mr. A. B. Lowry, C.B., Local Government Board, Mr. T. W. Phillips, C.B.E., Ministry of Labour; Mr. G. F. Plant, Secretary.

The Committee will also include a representative of women's interests, whose name will be published in due course.

The Committee's staff will for the present occupy temporary buildings on the Horse Guards Parade. These offices will be open on the 15th of January, from which date communications and enquiries should be addressed to the Secretary, Government Emigration Office, Horse Guards Parade, S.W. 1.

The Managing Committee of the Emigrants' Information Office will be replaced by the new Committee, and the resignation of its members has accordingly been accepted by the Secretary of State as from the 11th instant, with an expression of his cordial appreciation of their services. Continuity of the work will be secured by the appointment of the Chairman of the Emigrants' Information Office as Vice-Chairman, and by the appointment of Lord Burnham

GOVERNMENT NOTICES AFFECTING TRADE.—continued.

to be a member of the new Committee, and also by the inclusion of the staff of the Emigrants' Information Office in that of the new Committee

THE ADMINISTRATIVE SERVICES.

The Secretary of the War Office makes the following announcement with reference to the retention of the men of the administrative services of the Army:—

It is now and has always been necessary to retain a number of men in proportion to the strength of the Army in order to carry out the vital administrative work of feeding, clothing, housing, and moving the troops, and it must be realised that the more rapidly demobilisation proceeds, the greater is the strain thrown upon the administrative services.

The demobilisation of the Army involves the continuous employment of men engaged in transportation, and it is on this account that it is impracticable to demobilise the administrative services as rapidly as the combatant branches. By transportation must be understood not merely the railway men, inland water transport men, dock employees, and mechanical transport drivers, but the men engaged in the repair and other shops connected with these services. Every endeavour is being made to keep down the numbers of the administrative services to the minimum compatible with speedy demobilisation, and a beginning has already been made with the dispersal of the

- Royal Army Ordnance Corps,
- Royal Army Service Corps,
- Army Pay Corps,
- Remounts,
- Transportation Royal Engineers,
- Royal Army Veterinary Corps.

who have received a percentage of allotments which is as high as it possibly can be at present, and which will automatically increase as demobilisation proceeds.

ORDERS CANCELLED.

SURGICAL NEEDLES.

The Secretary of the War Office notifies, under date 1st January, that the control exercised under the Defence of the Realm Regulations by the Army Council over the manufacture of Surgical Needles, ceases as from 1st January, 1919, and permits for manufacture are therefore no longer necessary

COTTON DUCK AND CANVAS SALES RESTRICTION ORDER.

The Secretary of the War Office announces that the Cotton Duck and Canvas Sales Restriction Order, 1918, has been withdrawn.

Under this Order no person whose business consisted wholly or partly of the manufacture of Cotton Duck or Canvas could, without a permit from the Director of Raw Materials, War Office, sell Cotton Duck or Canvas made on looms capable of producing material of a weight equal to or exceeding 12 ozs. to the square yard.

POSTAL AND NON-POSTAL RESTRICTIONS.

The Army Council has issued Orders dated 28th December, revoking as from 6th January the Orders of May 2nd dealing with Postal and Non-Postal Restrictions. These Orders were both published in our issue of May 16th last on page 608. They were entitled "Prohibition on Non-Postal Communications to or from the United Kingdom" and "Restriction on Transmission from the United Kingdom of Certain Printed or Pictorial Matter." Notes were also published explanatory of the Orders. For the convenience of those interested we reprint the Orders and Notes below:—

PROHIBITION ON NON-POSTAL COMMUNICATIONS TO OR FROM THE UNITED KINGDOM. (Revoked.)

On and after the 27th May, 1918, no person who has not previously obtained a permit for the purpose from the Chief Postal Censor, and complied with any conditions subject to which the permit has been granted, shall despatch by post—

1. To any foreign destination, packets containing newspapers, books, or other printed publications, manuscript, or typescript, or cuttings from any of the above;
2. To Russia, Roumania, Greece, neutral countries in Europe and islands off the West Coast of Africa, packets containing plans, blue prints, photographs, and other pictorial representations or stamps.
3. To any neutral country in Europe, or to any allied country in Europe for re-transmission to a neutral country

GOVERNMENT NOTICES AFFECTING TRADE.—continued.

in Europe, packets containing goods or commodities other than printed, written, or illustrated matter

This Order shall not apply to—

- (a) Postal packets addressed to and intended for British troops in the field and British or Allied subjects interned in enemy or neutral countries;
- (b) Patent specifications sent with the authority of the Board of Trade;
- (c) Letters and postal correspondence, trade circulars and catalogues, bills of lading, invoices, and similar trade documents, cheques, bills of exchange, and other negotiable or valuable securities, despatched in accordance with any Post Office Regulations for the time being in force.

NOTES ON THE FOREGOING ORDER.

(1) With reference to the above Order it should be noted that packets addressed to British territory are not thereby affected.

(2) The despatch of postal packets to Prisoners of War or interned persons in neutral and enemy countries is subject to the regulations notified by the Post Office from time to time.

(3) The term "correspondence" does not include matter already published or intended for publication, files of old letters, and similar articles or postcards bearing pictorial representations.

(4) The Order affects all methods of postal despatch, whether by letter, printed papers, parcel or sample post, or "insured box"; but persons who held permits under Regulation 24c (which has now been revoked) for the despatch of matter, other than written, printed or illustrated matter, by parcel post or by sample post, may continue to send such parcels or samples under the conditions stated in their permits.

(5) Applications for permits under the Order should be addressed to the "Chief Postal Censor" (M.I.9.D.), Strand House, Carey Street, London, W.C.2.

(6) Permits are issued subject to the fulfilment of prescribed conditions only to those whose normal business is affected.

Persons who wish for private purposes to send matter, the despatch of which by post to a particular destination is affected by the Order, should place an order with a firm in possession of a permit.

(7) Permits issued under this Order do not in any way affect the necessity of complying with all other formalities required in connection with the export of merchandise.

RESTRICTION ON TRANSMISSION FROM THE UNITED KINGDOM OF CERTAIN PRINTED OR PICTORIAL MATTER (Revoked.)

1. On and after the 27th May, 1918, no person shall despatch, otherwise than through the post, or convey from the United Kingdom to any foreign country, any printed or written matter (including plans, photographs, and other pictorial representation), unless he has previously obtained a permit for the purpose from the Admiralty or the War Office, and has complied with any conditions subject to which the permit has been granted.

2. This Order shall not apply—

- (i) To ship papers.
- (ii) To any letter, message, or memorandum, or any such written or printed matter as aforesaid, conveyed by any person if he proves that it is required for his own use and does not contravene the provisions of any other of these regulations and is otherwise lawful.
- (iii) To any class of letters, messages, and memoranda, or any written or printed matter for the time being exempted by a Secretary of State.

NOTES ON FOREGOING ORDER.

With reference to the above Order:

(1) It is unnecessary to obtain a permit to transmit, consign, or export otherwise than through the post, or to convey from the United Kingdom, certain classes of printed and written matter, of which the following alone concern the general public—

- (i) Written or printed matter conveyed by any person who proves that it is required for his own use.
- (ii) Ship papers.
- (iii) The following documents exempted by an Order of one of His Majesty's Principal Secretaries of State; that is to say: Shipping documents despatched by a shipping company or business firm, provided that the document—
 - (a) Relates to the cargo or charter of the vessel in which it is conveyed;
 - (b) is placed for conveyance in the ship's box;
 - (c) is handed over on demand in an open cover for inspection to any competent naval or military authority or to any person authorised by him or

GOVERNMENT NOTICES AFFECTING TRADE—continued.

to any alien officer or officer of police unless it can be shown that it has already been examined and passed by an officer of the Postal Censorship.

(2) It is *useless* to apply for a permit to transmit otherwise than through the post or convey from the United Kingdom, any printed or written matter in the form of a *letter, written message, or memorandum*. Such matter may be so transmitted or conveyed without a permit if it falls within one of the classes specified under (i) (ii) (iii) above, and may in no circumstances be so transmitted or conveyed if it does not fall within one of these classes.

(3) Applications for permits under this Order should be addressed to the Chief Postal Censor (M.I.9.D.), Strand House, Carey Street, London, W.C.2.

(4) Permits are issued, subject to the fulfilment of prescribed conditions, only to those who require them for the purpose of their normal business.

Printed or written matter contained among the personal effects of individuals leaving the United Kingdom should, if not included under (i) of paragraph (1), be stored in this country for the duration of the war.

(5) Permits issued under this Order do not in any way affect the necessity of complying with all other formalities required in connection with the export of merchandise.

OXYGEN ORDER, 1917.

The Admiralty have cancelled the Oxygen Order made on 17th December, 1917, which regulated the sale and supply of oxygen in the United Kingdom. The Order provided that oxygen might be sold or supplied only in accordance with directions given by the Director of Material and Priority, Admiralty, who was also authorised to call for returns from persons and companies manufacturing or supplying oxygen, whether for sale or for their own use.

JUTE (RESTRICTION OF CONSUMPTION) ORDER.

The War Office announce that the Jute (Restriction of Consumption) Order, 1918, has been withdrawn.

Under this Order no person could, without a permit issued by or on behalf of the Director of Raw Materials, War Office, put into any process of manufacture any Raw Jute, or any yarn or other article or material, wholly or partly manufactured therefrom.

TOBACCO RESTRICTION ORDERS.

The Board of Trade give notice that the Tobacco Restriction Order (No. 2), 1917, the Tobacco Restriction Order (No. 3), 1917, and the Tobacco Restriction Order (No. 1), 1918, will cease to have effect as from 11th January, 1919.

ORDERS SUSPENDED.**BALL BEARINGS ORDER, 1917.**

The Minister of Munitions has suspended the operation of the Ball Bearings Order, 1917, dated the 1st November, 1917. This suspension took effect on the 7th day of January, 1919, and remains in force until further notice.

POSTAL SECTION.**PARCEL POST TO GREECE AND SALONIKA.**

With reference to the notice appearing on p. 762 of the "Journal" of 19th December, the Postmaster-General announces that arrangements have been made for the despatch of parcels to Greece by transport from Taranto to Salonika, *via* Port Said to Salonika, and also by sea direct from London once a month.

INDIAN MAILS.

The Postmaster-General announces that the Indian Mail will again be sent overland, beginning on the 9th inst. The Mail will close at the General Post Office at 5 p.m. each Thursday, and will be due at Bombay in 21 days.

In the homeward direction there will be regular weekly arrivals about the end of the week, beginning about the 24th of January.

PARCEL POST SERVICES.

The Postmaster-General announces the resumption of the Parcel Post Services by the all-sea route to the Azores, Canary Islands, Cape Verde Islands, Madeira, Portugal, and Portuguese West Africa.

GOVERNMENT NOTICES AFFECTING TRADE—continued.**FOOD SECTION.****RATION BOOKS.**

It has been decided not to issue a new National Ration Book to take the place of the present book when it expires on 3rd May next. The Ministry of Food, however, announce that it will probably be necessary to use some of the spare spaces in the present book for rationing at least of meat and sugar after that date. The public should therefore keep their ration books carefully. It is also probable that the registration of customers with their retailers for certain other articles will be continued after 3rd May.

THE DISTRIBUTION OF MILK.

To enable Food Control Committees to secure, as far as is practicable, that the available milk supplies in their districts shall be distributed amongst consumers as equitably as possible, the Food Controller has issued an Order, the Milk (Local Distribution) Order, 1918, which confers further powers on Food Control Committees.

The Order is in two parts. The first part, which supercedes similar provisions in the Milk (Winter Prices) Order, 1918, gives to Food Committees extended powers to enforce a priority scheme of milk distribution. At the same time the Ministry of Food has slightly modified the scale of priority hitherto laid down.

The second part of the Order enables a Committee, with the consent of the Food Commissioner, to put into force a scheme for the registration of customers with their milk retailers and for controlling supplies of milk to establishments.

GENERAL SECTION.**LAUNDRY WORK: COLLECTION AND DELIVERY.**

The instruction dated 13th September, 1918, issued by the Road Transport Board pursuant to paragraph 1 of the Road Transport (No. 2) Order, 1918, limiting the collection and delivery of laundry work will be revoked as from the 6th January, 1918. The text of the instruction was as follows:—

LAUNDRY WORK.

Instruction issued by the Road Transport Board pursuant to paragraph 1 of the Road Transport (No. 2) Order, 1918.

Where laundry work is collected or delivered by a vehicle to which Regulation 2333 of the Defence of the Realm Regulation applies, such work must be collected and delivered on the same day, and no customer may be visited on more than one day per week without leave of the Divisional Road Transport Officer. This instruction does not apply to laundry work for hospitals.

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

NOTE.—Regulation 2333 applies to all vehicles capable of being used for road transport which are not used wholly or mainly in agriculture].

ENEMY MERCHANT SHIPS.**GENERAL LICENCE FOR THE REPAIR OF ENEMY MERCHANT SHIPS UNDER THE CONTROL OF THE ALLIED MARITIME TRANSPORT COUNCIL.**

Whereas by Royal Proclamation relating to Trading with the Enemy, dated the 9th day of September, 1914, it was, amongst other things, declared as follows:—

"The expression 'enemy country' in this Proclamation means the territories of the German Empire and of the Dual Monarchy of Austria-Hungary, together with all the Colonies and Dependencies thereof."

And whereas it was also declared by the said Proclamation that from and after the date of the said Proclamation the persons therein referred to were prohibited from doing certain acts therein more specifically mentioned:

And whereas it was further declared by the said Proclamation as follows:—

"Nothing in this Proclamation shall be taken to prohibit anything which shall be expressly permitted by Our Licence, or by the licence given on Our behalf by a Secretary of State, or the Board of Trade, whether such licences be especially granted to individuals or be announced as applying to classes of persons."

And whereas by Proclamation dated the 5th day of November, 1914, it was declared that the provisions of the Proclamations and Orders-in-Council then in force issued with reference to the state of war with the Emperor of Germany and the Emperor of Austria, King of Hungary, should be extended to the war with Turkey, subject to the exception in such Proclamation mentioned, and it was

GOVERNMENT NOTICES AFFECTING TRADE—*continued.*

declared that the words "enemy country" in any of the Proclamation or Orders-in-Council referred to in Article 1 of the said Proclamation should include the Dominions of His Imperial Majesty the Sultan of Turkey, other than Egypt, Cyprus, and any territory in the occupation of Us or Our Allies:

And whereas by Proclamation, dated the 16th day of October, 1915, it was declared that the Proclamations and Orders-in-Council then in force, issued with reference to the state of war with the German Emperor, or with reference to the state of war with the German Emperor and the Emperor of Austria, King of Hungary, or with reference to the state of war with the German Emperor and the Emperor of Austria, King of Hungary, and the Sultan of Turkey, should be extended to the war with Bulgaria, subject to the exception in such Proclamation mentioned, and it was declared that the words "enemy country" in any of the Proclamations or Orders-in-Council referred in Article 1 of such Proclamation should include the Dominions of the King of the Bulgarians and the words "persons of enemy nationality" in any of the said Proclamations and Orders-in-Council should include subjects of the King of the Bulgarians:

And whereas certain enemy merchant ships are or may be under the control of the Allied Maritime Transport Council:

Now, therefore, the Board of Trade, acting on behalf of His Majesty, and in pursuance of the powers reserved in the said Proclamations and all other powers thereunto them enabling, do hereby give and grant licence to all persons residing, carrying on business or being in the United Kingdom to negotiate regarding the repair and fitting out of, and to repair and fit out, any enemy merchant ship that is for the time being under the control of the Allied Maritime Transport Council.

SALE ABROAD OF FOREIGN, COLONIAL AND INDIAN SECURITIES.

The Lords Commissioners of His Majesty's Treasury announce, under date of 1st January, that they have given general permission under the provisions of the Defence of the Realm (Securities) Regulations of 24th January, 1917, for the sale abroad until further notice of any Foreign, Colonial, and Indian Securities to which the Regulations relate (whether or not the securities have remained in physical possession in the United Kingdom since 30th September, 1914), and the shipment abroad of the securities in completion of any such sales subject to the following limitations and conditions:—

1. Such permission shall apply only to securities which have not at the time of sale been included in any order issued by the Treasury under the Regulations.

2. The proceeds of any such sales shall be remitted to this country forthwith and retained here.

3. The proceeds of drawn securities or maturing securities collected abroad shall be remitted to this country forthwith and retained here in the same manner as the proceeds of any sales of securities.

4. All existing Regulations in regard to dealing with securities which have not been continuously in physical possession in the United Kingdom or which have been in enemy ownership, or in which any enemy interest is concerned, will continue to apply in full force to all dealings under this permission.

5. Before any securities are sent abroad for registration and return, a form of permit for the re-import of such securities under the terms of the Prohibition of Import (No. 21) Proclamation, 1917, must be obtained from the American Dollar Securities Committee, 19, Old Jewry, E.C. 2.

6. The notice issued by the Lords Commissioners of His Majesty's Treasury, under date 30th January, 1917, is revoked.

TRADING WITH PALESTINE AND SYRIA.

GENERAL LICENCE.

Whereas by Proclamation dated the 5th day of November, 1914, it was declared that the Proclamations and Orders-in-Council then in force issued with reference to the state of war with the Emperor of Germany and the Emperor of Austria, King of Hungary, should be extended to the war with Turkey subject to the reservations in such Proclamations:

And whereas the Proclamations so extended to the war with Turkey included the Trading with the Enemy Proclamation No. 2, dated the 9th day of September, 1914, and the Proclamation relating to Trading with the Enemy dated the 8th day of October, 1914:

And whereas by Proclamations dated the 7th day of January, 1915, and the 14th day of September, 1915, the Provisions of the aforesaid Proclamations were extended as therein more specifically set forth:

GOVERNMENT NOTICES AFFECTING TRADE—*continued.*

And whereas it was declared by the said Trading with the Enemy Proclamation No. 2 as follows:—

"Nothing in this Proclamation shall be taken to prohibit anything which shall be expressly permitted by Our licence, or by the licence given on Our behalf by a Secretary of State, or the Board of Trade, whether such licences be especially granted to individuals or be announced as applying to classes of persons."

And whereas it is desirable to grant the licence hereinafter appearing:

Now, therefore, the Board of Trade, acting on behalf of His Majesty, and in pursuance of the powers reserved in the said Proclamations and all other powers thereunto them enabling, do hereby give and grant licence to all persons and bodies of persons resident carrying on business or being in the United Kingdom to trade and have commercial and financial transactions with persons or bodies of persons resident or carrying on business in the following territories, namely, Palestine and Syria as far north as a line from Alexandretta to Aleppo inclusive and as far east as the Hejaz railway inclusive:

Provided always that any licence which may be necessary in respect of any transaction under any prohibition of export or prohibition of import for the time being in force in the United Kingdom or in respect of any remittance of money out of the United Kingdom covered by Regulation 4(b) of the Defence of the Realm Regulations is first obtained:

Provided also that this licence shall not permit any person or body of persons to pay to any person or body of persons resident or carrying on business in the said territories any sum of money which by the terms of the Trading with the Enemy Amendment Acts, 1914 and 1915, or either of them, is required to be paid to the Custodian appointed under the Trading with the Enemy Amendment Act, 1914, but such sums of money must be paid to the said Custodian:

Provided further that this licence shall not permit any person or body of persons to pay or deliver to any person or body of persons resident or carrying on business in the said territories any sum of money or property of which notice is required to be given to the said Custodian under the said Acts or either of them.

INCREASED RATINGS OF GAS AND ELECTRICITY.

The following official announcement has been made by the Coal Controller, under the Household Fuel and Lighting Order, 1918:—

1. The Controller of Coal Mines, in exercise of the powers conferred upon him under Clause 7 of the above Order, hereby gives notice that the conversion equivalent for gas in terms of fuel shall be increased to 18,750 cubic feet to the ton, and for electricity to 1,000 Board of Trade units to the ton, as from the meter readings taken for the close of the quarter ended 31st December last (except in those cases in which a higher conversion equivalent has already been specially agreed).

2. Further, the Controller of Coal Mines determines that the allowances for lighting under Clause 8 or the special assessments for lighting agreed under Clause 12 of the above Order shall from such meter readings be likewise increased by 25 per cent.

3. Such variation in the conversion equivalent for lighting allowances shall be without prejudice to any action taken or to be taken in connection with excess consumptions of gas or electricity in the quarter just closed.

4. Further, under the powers conferred upon him by Clause 4 of the above Order, the Controller of Coal Mines agrees to the suspension of Clause 99 referring to the restrictions on gas and electrical fittings as from the date of this notice.

SALE OF COAL (IRELAND) ORDER, 1919.

The Sale of Coal (Ireland) Order, 1919, dated the 3rd day of January, 1919, which has been made by the Board of Trade under Regulations 2F, 2c, and 2J of the Defence of the Realm Regulations, is as follows:—

The Board of Trade, deeming it expedient to make further exercise of their powers under the Defence of the Realm Regulations as respects coal, hereby order as follows:—

1. No person shall on any sale or proposed sale of coal for shipment to Ireland or on any sale or proposed sale of coal in Ireland, impose or attempt to impose any condition as to the sale of any other coal than that demanded by the purchaser or of any other article whatsoever.

2. Every person who sells coal in Ireland shall keep accurate records showing (a) the person, firm or company from whom he purchased the coal; (b) the description under which the coal was sold to him; (c) the price which he paid

GOVERNMENT NOTICES AFFECTING TRADE—*continued.*

for the coal; (d) the price at which he sold the coal, and the person to whom he sold it and the quantity sold to each person; and (e) unless the coal was sold at the retail price agreed upon with and published by the local authorities under the Retail Coal Prices Order, 1917, the amount added to the cost for cost of handling and delivery.

3. Every person who sells coal in Ireland shall give inspection of such records and of all invoices, contracts and documents relating to any coal referred to therein to any person authorised by the Controller of Coal Mines, and shall make such returns as to his business as the Controller may from time to time require.

4. No person shall offer or agree to sell coal for shipment to Ireland without disclosing to the purchaser before the contract is completed the pit price or the price f.o.b. charged by the Owner of the colliery from whom the coal is obtained.

5. Where coal is sold for shipment to Ireland the seller shall deliver to the purchaser an invoice and shall state therein the quantity and precise description of the coal, the name of the colliery from which the coal, or from which each description if more than one, was supplied, the pit or f.o.b. price of the coal, or of each description thereof, the insurance, transport and shipping charges, and the merchants' or factors' profit, if any. The seller shall also state on the invoice whether the coal is sold for bunkering or for consumption in Ireland.

6. No person shall re-sell for consumption in Ireland coal which has been sold for bunkering, or shall re-sell for bunkering coal which has been sold for consumption in Ireland.

7. Infringements of this Order are summary offences against the Defence of the Realm Regulations.

8. This Order may be cited as The Sale of Coal (Ireland) Order, 1919, and shall have effect from the thirteenth day of January, 1919.

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:—

COLONIAL

Commercial, Financial, and Economic.

Canada: Annual Report of the Department of Trade and Commerce for the years ending 31st March, 1917-18.

New South Wales: Public Accounts Prepared by the Treasurer for the financial year ended 30th June, 1918. And the Report of the Auditor General.

Nigeria: Nigerian Railway Administrative Report for year 1917 with Appendices.

Metals, Mining, Machinery.

Commerce and Gold Production.

"The South African Mining Journal and Engineering Record," 21st September, 1918.

Hardware Trade and Motor Accessories.

"Australasian Hardware and Machinery," Vol. XXXIII, No. 11, 1st October, 1918.

Chemicals.

Analysis of Sulphate Acid.

"Pulp and Paper Magazine of Canada," 21st November, 1918.

Poison Gases used in Chemical Warfare.

"The Chemist and Druggist and Pharmacist of Australasia," Vol. XXXIII, No. 9, 1st August, 1918.

FOREIGN.

Commercial, Financial, and Economic.

Alsace-Lorraine—Industrial Report.

"Le Bulletin des Halles" (Paris), 12th December, 1918.

Brazil: Financial Situation of the Municipality of Sao Paulo.

"Le Messager de Sao Paulo," 21st September, 1918.

Japan: The Eighteenth Financial and Economic Annual of Japan, 1918.

Mexico: Development of Industry.

"Boletín de Industrias" (Mexico City), July, 1918.

Spain: Produce Quotations at Barcelona.

"Vida Financiera" (Madrid), 30th October, 1918.

Chemicals and Oils.

Petrol in Alsace.

"Le Bulletin des Halles" (Paris), 12th December, 1918.

Agriculture, Dairy, and Forest Products.

Carbonate of Soda in Vine Cultivation.

"Le Bulletin des Halles" (Paris), 25th December, 1918.

Cultivation of Tobacco in Tunis.

"Le Bulletin des Halles" (Paris), 12th December, 1918.

Forest Cultivation.

"Le Bulletin des Halles" (Paris), 20th November, 1918.

The Price of Straw and Fodder.

"Le Bulletin des Halles" (Paris), 12th December, 1918.

Textile and Textile Materials.

Cotton Cultivation in Spain.

"Boletín de Agricultura Técnica y Económica" (Madrid), 30th October, 1918.

Shipping and Transport.

Compagnie de Navigation Sud Atlantique: Full Report of Annual General Meeting.

"Le Messager de Sao Paulo," 21st August, 1918.

Acceleration of Transport.

"Le Bulletin des Halles" (Paris), 12th December, 1918.

Commercial Returns.

COTTON IMPORTS.

Return of the Number of Bales of Cotton Imported at the Various Ports of the United Kingdom during the week ended 2nd January, 1919. There were no exports during the week.

	Week ended 2nd Jan., 1919
	IMPORTS
	Bales.
America	117,033
Brazilian	—
East Indian	—
Egyptian	15,642
Miscellaneous	9,327*
Total	142,002

* Including 145 bales Foreign East African

CORN PRICES.

Statement showing the Average Price of British Corn, per quarter of 8 bushels Imperial Measure,* as received from the Inspectors of Corn Returns in the week ended 4th January, 1919, and corresponding weeks of the seven previous years, pursuant to the Corn Returns Act, 1882.

	Average Price.					
	Wheat.		Barley.		Oats.	
	s.	d.	s.	d.	s.	d.
Week ended 4th January, 1919 ..	72	2	62	3	48	8
Corresponding week in—						
1911	33	1	33	0	20	8
1912	30	3	28	4	19	2
1913	30	11	25	11	18	4
1914	46	2	29	7	26	5
1915	55	8	47	8	31	5
1916	76	0	66	4	47	1
1917	71	2	58	0	45	5

* 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.

NOTICE.

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Commercial Returns.

UNITED KINGDOM.

FOREIGN TRADE IN DECEMBER, 1918.

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

	Month ended 31st December					
	Imports (Value C.I.F.*).		Exports (Value F.O.B.†).			
	1917.	1918.	PRODUCE AND MANUFACTURES OF THE UNITED KINGDOM.		FOREIGN AND COLONIAL MERCHANDISE.	
	1917.	1918.	1917.	1918.	1917.	1918.
	£	£	£	£	£	£
I.—Food, Drink, and Tobacco—						
A. Grain and Flour	7,460,931	13,808,042	32,554	48,109	223,102	28,123
B. Meat, including Animals for Food	8,094,091	15,393,569	8,490	16,118	13,560	816,795
C. Other Food and Drink :						
(1) Non-dutiable	5,376,327	12,017,354	787,854	792,975	107,971	76,581
(2) Dutiable	5,603,182	6,504,978			71,149	59,262
D. Tobacco	504,301	1,363,852	262,047	221,683	4,182	5,980
Total, Class I.	27,038,832	49,087,795	1,090,945	1,078,876	419,964	986,741
II.—Raw Materials and Articles Mainly Un-manufactured—						
A. Coal, Coke, and Manufactured Fuel	4,596	—	3,411,276	3,779,375	—	—
B. Iron Ore, Scrap Iron and Steel	860,962	951,114	2,975	8,063	—	—
C. Other Metallic Ores	1,396,229	1,635,734	6	102	33,275	58,726
D. Wood and Timber	2,633,524	3,667,746	56,124	99,109	6,260	172
E. Cotton	10,817,964	15,304,195	—	—	3,260	—
F. Wool	1,981,353	2,496,895	161,933	102,960	347,537	211,949
G. Other Textile Materials	2,712,405	3,047,809	15,341	914	167,614	191,477
H. Oil Seeds, Nuts, Oils, Fats, and Gums	5,897,758	11,268,561	592,468	95,190	166,773	68,277
I. Hides and Undressed Skins	2,023,256	2,243,139	96,666	46,044	186,483	271,277
J. Paper-making Materials	773,283	1,422,795	27,359	19,272	—	—
K. Miscellaneous	2,070,876	3,248,399	118,174	129,592	508,716	338,776
Total, Class II.	31,172,206	45,286,387	4,483,322	4,280,612	1,509,858	1,140,654
III.—Articles Wholly or Mainly Manufactured—						
A. Iron and Steel and Manufactures thereof	809,298	669,094	2,446,334	2,890,332	18,240	124,257
B. Other Metals and Manufactures thereof	4,930,740	3,133,824	675,691	554,331	507,356	88,920
C. Cutlery, Hardware, Implements (except Machine Tools), and Instruments	337,267	441,274	313,047	351,197	33,334	63,885
D. Electrical Goods and Apparatus (other than Machinery and Uninsulated Wire)	99,542	59,122	187,785	244,379	8,814	1,121
E. Machinery	690,399	782,892	1,219,694	1,174,320	15,297	10,747
F. Ships (new)	—	—	6,025	1,528	—	—
G. Manufactures of Wood and Timber (including Furniture)	173,978	167,514	44,470	34,239	16,779	1,081
H. Yarns and Textile Fabrics :						
(1) Cotton	350,944	408,089	12,045,146	13,975,607	47,786	50,357
(2) Wool	7,928	11,5064	4,140,606	4,336,595	4,595	50,291
(3) Silk	823,983	1,318,647	146,401	190,148	123,300	108,563
(4) Other Materials	458,948	331,801	1,082,097	738,358	40,359	54,153
I. Apparel	67,730	94,247	956,003	847,471	4,862	8,552
J. Chemicals, Drugs, Dyes, and Colours	3,195,357	2,436,035	1,948,818	1,993,201	216,538	188,863
K. Leather and Manufactures thereof (including Gloves, but excluding Boots and Shoes)	1,262,902	1,204,100	181,150	129,310	7,579	9,013
L. Earthenware and Glass	31,898	26,145	257,649	283,089	5,637	1,127
M. Paper	428,334	404,463	269,408	243,899	4,935	2,703
N. Railway Carriages and Trucks (not of Iron) ; Motor Cars, Cycles, Carts, &c.	669,314	1,697,647	437,673	325,908	7,097	7,734
O. Miscellaneous	11,854,876	7,713,931	3,430,146	3,233,315	179,971	212,866
Total, Class III.	26,192,538	20,903,889	29,788,143	31,547,227	1,242,479	984,333
IV.—Miscellaneous and Unclassified (including Parcel Post)	366,146	913,780	1,778,104	1,375,320	7,286	979
TOTAL	84,769,722	116,191,851	37,140,514	38,282,035	3,179,587	3,112,707

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

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

Commercial Returns.

UNITED KINGDOM.

FOREIGN TRADE IN THE YEAR ENDING DECEMBER, 1918.

The following table shows the value of the external trade of the United Kingdom during the twelve months ending 31st December, 1918, compared with particulars for a year earlier:—

Year ended 31st December.

	Imports (Value C.I.F.*).		Exports Value (F.O.B.†).			
			PRODUCE AND MANUFACTURES OF THE UNITED KINGDOM.		FOREIGN AND COLONIAL MERCHANDISE.	
	1917.	1918.	1917.	1918.	1917.	1918.
I.—Food, Drink, and Tobacco—	£	£	£	£	£	£
A. Grain and Flour	175,600,319	154,404,011	861,633	449,439	925,600	355,190
B. Meat, including Animals for Food	162,398,081	174,088,292	268,630	120,157	412,597	1,600,358
C. Other Food and Drink :						
(1) Non-dutiable	96,400,478	128,409,338	11,904,047	8,013,704	3,213,445	1,087,845
(2) Dutiable	76,988,123	97,515,242				
D. Tobacco	3,923,954	18,242,807	3,297,043	3,483,413	276,762	52,301
Total, Class I.	454,710,955	572,659,690	16,331,833	12,066,713	7,438,957	4,030,027
II.—Raw Materials and Articles Mainly Un-manufactured—						
A. Coal, Coke, and Manufactured Fuel	6,419	430	51,341,487	52,416,330	—	—
B. Iron Ore, Scrap Iron and Steel	12,138,373	13,435,171	111,868	85,734	1,135	—
C. Other Metallic Ores	15,328,513	17,656,390	20,964	10,271	610,306	692,667
D. Wood and Timber	25,645,897	29,181,919	495,491	923,838	189,820	74,472
E. Cotton	110,590,634	150,286,308	—	—	7,683,002	23,550
F. Wool	51,729,188	39,659,797	3,185,522	1,706,669	3,599,598	2,409,806
G. Other Textile Materials	28,014,754	31,369,591	264,111	89,155	3,060,762	2,032,518
H. Oil Seeds, Nuts, Oils, Fats, and Gums	75,773,198	116,643,336	8,032,047	2,755,975	4,944,633	943,227
I. Hides and Undressed Skins	18,382,830	18,844,011	1,317,375	1,201,842	3,793,395	2,034,903
J. Paper-making Materials	10,358,876	13,149,931	489,656	262,881	2,214	7,409
K. Miscellaneous	36,829,759	28,632,277	1,903,274	1,385,531	19,489,474	6,106,352
Total, Class II.	384,798,441	458,859,041	67,161,795	60,838,226	43,374,339	14,324,904
III.—Articles Wholly or Mainly Manufactured—						
A. Iron and Steel and Manufactures thereof	10,782,609	9,709,523	44,828,253	36,731,455	503,837	1,143,443
B. Other Metals and Manufactures thereof	43,627,977	46,694,463	10,281,611	9,069,620	4,822,265	1,671,001
C. Cutlery, Hardware, Implements (except Machine Tools), and Instruments	4,983,026	5,785,871	4,750,777	4,388,946	485,476	509,619
D. Electrical Goods and Apparatus (other than Machinery and Uninsulated Wire)	1,334,719	1,048,828	2,926,222	2,152,482	193,527	54,236
E. Machinery	8,863,465	10,700,916	19,482,924	16,062,593	361,075	222,308
F. Ships (new)	125	1,226	1,087,307	607,083	—	—
G. Manufactures of Wood and Timber (including Furniture)	1,326,242	2,077,047	859,923	469,801	209,237	84,735
H. Yarns and Textile Fabrics :						
(1) Cotton	3,862,050	4,938,279	145,924,711	180,103,022	809,086	725,113
(2) Wool	251,804	149,171	52,847,674	49,735,844	209,477	257,309
(3) Silk	11,420,296	17,220,607	2,018,056	2,102,318	1,621,798	1,567,612
(4) Other Materials	8,130,391	6,440,849	16,943,970	11,048,545	1,704,263	697,091
I. Apparel	1,365,793	1,288,442	15,762,497	11,637,387	149,327	70,282
J. Chemicals, Drugs, Dyes, and Colours	28,927,543	38,543,957	23,583,139	22,740,983	3,312,544	2,887,865
K. Leather and Manufactures thereof (including Gloves, but excluding Boots and Shoes)	11,095,586	10,337,083	4,968,007	1,545,714	1,678,149	117,470
L. Earthenware and Glass	655,440	311,775	3,893,117	3,968,006	69,004	45,247
M. Paper	4,189,314	5,131,810	3,194,672	3,163,995	78,869	34,440
N. Railway Carriages and Trucks (not of Iron) ; Motor Cars, Cycles, Carts, &c.	7,506,114	12,309,828	6,878,309	6,504,595	534,989	101,526
O. Miscellaneous	71,142,352	107,474,122	63,380,029	41,748,531	2,051,180	2,395,735
Total, Class III.	218,564,896	280,163,797	423,614,198	403,720,920	18,794,103	12,585,032
IV.—Miscellaneous—and Unclassified—	6,090,386	7,656,063	19,974,900	21,847,206	70,062	16,066
TOTAL	1,064,164,678	1,319,388,591	527,079,746	493,473,065	69,677,461	30,956,029

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