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# INDIAN CENTRAL JUTE COMMITTEE

## Report on the MARKETING & TRANSPORT OF JUTE IN INDIA

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### FIRST REPORT

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## PREFACE

The Enquiry into the Marketing and Transport of Jute was one of the earliest investigations undertaken by the Indian Central Jute Committee. At the first meeting of the Committee held on the 10th of February, 1937, the scope of the proposed Enquiry was indicated in general terms; but it was laid down at the meeting of the committee held in February, 1939, that it should be divided into two parts, viz:—(1) the Marketing and Transport of Raw Jute and (2) the Utilization of Jute in India, and the Marketing of Manufactured Products. The present Report—described in the title page as the First Report—embodies the results of the first part of the Enquiry. The preparation of the Second Report has been recently taken in hand; and, according to the schedule to which the Marketing staff of the Committee are now working it is likely to be published before the current year is out.

The Table of Contents will show at a glance the amount of ground that the First Report has endeavoured to cover. Starting with a concise, but, it is to be hoped, complete description of the present system of crop-forecasting, the Report proceeds to examine at length the various stages through which the fibre passes from the grower to the manufacturer or shipper, as well as the details of the marketing organization and the methods of buying and selling that are followed at all these stages. While valuable assistance was received from such published material as exists on this subject, and in particular from the Reports of the Bengal Jute Enquiry Committees of 1934 and 1939, much the greater proportion of the information contained in this Report was based on the facts and statistics collected by the Committee's four Marketing Officers in course of their extensive tours all over the jute growing areas in 1938 and 1939. During this period they interrogated nearly 5700 cultivators and over 1100 *beparis*, *araldars*, *balers*, influential *zamindars* and Government officials, spread over 1500 villages and 168 primary markets and baling centres. These figures will give an indication of the efforts that have been made to obtain first hand information on some aspects of the trade in raw jute, in which, notwithstanding the recent striking growth of public interest in the jute growing provinces of India, adequate and precise knowledge has been hitherto singularly lacking. From the very beginning, one of the objects underlying the investigation of conditions

relating to the marketing and transport of jute has been the preparation of a comprehensive and authentic record of authoritative information on this subject. To what extent the present Report has attained this object it will be for its readers to judge.

Apart from purely descriptive matter, which covers much new ground in several important directions, attempts have been made to add precision to many of the findings contained in the Report by quantitative estimates on a number of subjects, which, for lack of reliable data, have hitherto lent themselves only to qualitative analysis. For instance, in regard to the problems connected with illegal deductions and allowances and the spread between village and Calcutta prices, the quantitative investigations undertaken in this Report will, it is hoped, be a positive aid to clear and accurate thinking on these subjects. Such researches on these and similar other points have not been easy to undertake. As the estimates have had to be based generally on the results of sample surveys, it is not to be expected that the figures set out in this Report will exactly fit in with the conditions prevailing in every part of the jute growing areas. The best claim that can be made for the estimates given in this Report is that they are broadly in accord with the law of averages, and that the deviations from them will not be found to be either widely dispersed or very asymmetrically distributed. In regard to other matters in the Report on which statistics already exist, considerable difficulty was often experienced owing to the discrepancies found between official and trade figures. Attempts have been made to reconcile them as far as possible, and, in rare instances it has been considered desirable to use the figures obtained from the Enquiry in preference to the generally accepted trade or official statistics. It is needless to add that this course has been followed only in those exceptional cases where the unreliability of trade or official statistics was palpably demonstrable.

There is another matter to which a brief reference is needed. Not only was the collection of the relevant information and statistics completed long before the coming of the present war, but the drafting of the Report itself had been already well-advanced when the war broke out. Consequently, it may *prima facie* appear that the information collected in this Report and the conclusion that they indicate may require revision in the altered circumstances of the present. While such an *a priori* view certainly appears more than plausible, in the event it has been found that very few changes on this account in the drafting of the present Report are called for. It is well to remember that, as yet, the visible effects

of the war on those aspects of the trade in raw jute, which form the subject matter of this Report, have been not so much on the structure of this trade itself as on the economic forces, which underly the processes of trading, and that the changes induced in these forces have hitherto affected mainly the Calcutta end of this trade. Some of the recent measures adopted or proposed to be adopted by the Government of Bengal may, however, affect the trade in raw jute to a much greater extent. But hitherto such action as they have taken has been admittedly of a tentative nature. In any case, it does not entail any important or far-reaching modifications in the findings of the present Report.

For the convenience of the general reader, as well as of those that are unable to devote adequate time and thought to the perusal of the Report, a summary of findings and recommendations has been set out in the concluding chapter of this Report. These will indicate, in a general way, the principal directions in which remedial or ameliorative measures are necessary. The Indian Central Jute Committee do not claim any originality for the views expressed in this Report or for the recommendations that they contain; nor do they pretend to believe that the prescriptions for some of the ills of the trade in raw jute that this Report contains will bring about their immediate cure. They would, however, claim that, in the existing order of economy, the recommendations that they have made constitute the only durable foundation on which a strong distributional structure can be built. It is as a contribution towards that end that the Indian Central Jute Committee undertook the preparation of this Report about three years ago and it is in the hope that it will facilitate the achievement of that object that they now present this Report to the various jute growing provinces, and the trade and business interests concerned.

D. L. MAZUMDAR,

*Secretary.*

*Indian Central Jute Committee.*

Calcutta, the 19th August, 1940.

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APPENDIX A.

*Complete List of Jute Mills in India (1940).*

BENGAL

Name of Mill	Year originally built	No. of Looms <sup>1</sup>			Remarks
		Hessian	Sacking	Total	
Adamjee	1929	703	208	911	
Albion	1910	339	159	498	
Alexandra	1905	296	150	446	
Alliance	1897	797	467	1,264	2 mills
Anglo-India	1917	1,589	972	2,561	4 "
Agarpara	1930	553	326	879	
Angus	1912	890	306	1,196	
Auckland	1908	450	360	810	
Bally	1908	659	300	959	
Bansberia	1925	1,001	708	1,709	2 mills
Barnagore	1859	1,199	690	1,889	3 "
Belvedere	1908	601	219	820	
Bharat	1935	164	56	220	
Birla	1921	982	391	1,373	
Bengal	1875	250	350	600	Old Ganges
Budge-Budge	1874	552	439	991	3 mills
Caledonian	1916	371	245	616	
Cheviot	1920	480	50	530	
Calcutta Jute Mfg.	1901	363	139	502	Old Narkeldanga
Champdany	1873	339	205	544	
Clive	1875	546	423	969	2 mills
Craig	1921	242	154	396	
Dalhousie	1905	448	318	766	
Delta	1899	458	321	779	
Empire	1913	295	205	500	
Fort Gloster	1873	1,098	786	1,884	3 mills
Fort William	1874	633	381	1,014	2 "
Gourepore	1862	962	432	1,394	2 "
Hastings	1875	661	417	1,078	
Hooghly	1883	466	254	720	
Howrah	1874	1,234	706	1,940	3 mills
Hukumchand	1922	1,524	748	2,272	2 "
India	1866	811	265	1,076	2 "
Kamerhatty	1877	1,250	547	1,797	2 "

1. cf. *Jute Statistics, (1940-41)* published by Messrs. J. Thomas & Co.

## Jute Mills in India.

BENGAL—(Contd.)

Name of Mill	Year originally built	No. of Looms			Remarks
		Hessian	Sacking	Total	
Kankinarrah	1884	1,239	288	1,527	2 mills
Kedernath	1932	219	1	220	
Kelvin	1908	394	309	703	
Khardah	1895	914	616	1,530	2 ..
Kinnison	1897	675	575	1,250	2 ..
Lansdowne	1898	488	443	931	
Lawrence	1907	456	384	840	
Lothian	1917	261	297	558	
Ludlow	1920	546	300	846	
Luxmi	1875	365	85	450	Old Belliaghatta
Megna	1922	840	168	1,008	2 mills
Mafatlal Gagalbhai	—	400	220	620	
Naihati	1907	414	401	815	
Naskarpara	1933	333	92	425	
National	1900	573	279	852	
New Central	1875	439	270	709	
Nafar Chandra	1937	92	53	145	
Northbrook	1908	352	215	567	
Nuddea	1921	644	448	1,092	2 mills
Orient	1920	551	50	601	
Prabartak	1941	50	—	50	
Premchand	1929	364	240	604	
Presidency	1921	238	162	400	
Reliance	1908	924	352	1,276	
Samnuggar	1874	1,485	528	2,013	3 mills
Societe Generale Industrielle de Chandernagore	1895	409	198	607	Old Gondolpara
Soorah	1874	201	200	401	
Standard	1896	367	283	650	
Sri Mahadeo	1937	136	34	170	
Sri Luchminarain	1936	375	125	500	
Sri Gouri Sanker	1935	152	24	176	
Sri Hanuman	1930	803	177	980	
Sri Ganesh	1932	1	35	36	
Tittagarh	1884	1,198	596	1,794	2 mills
Union North	1874	300	219	519	
Union South	1898	440	367	807	
Victoria	1884	998	333	1,331	2 mills
Waverly	1921	306	159	465	
Wellington	1855	448	408	856	
<b>Total</b>	—	42,596	22,631	65,227	

*Jute Mills in India.*

## OUTSIDE BENGAL

Name of Mill	Year originally built	No. of Looms			Remarks
		Hessian	Sacking	Total	
Nellimarla	1919	55	261	316	Nellimarla, Madras
Chitavalsah	1926	124	376	500	Vizianagram, ..
Krishna Jute & Cotton	1927	25	116	141	Ellore, ..
Sree Bajrang	1929	—	68	68	Guntur, ..
Katihar	1934	44	176	220	Katihar, Bihar
R. B. Hurduttroy Motilal Jute Mills	1934	50	400	450	Katihar, ..
Biratnagar	1935	—	169	169	Jogbani, ..
Rameswara	1935	—	305	305	Muckterpore ..
Raigarh	1925	25	125	150	Raigarh, Central Provinces
Mahabir	1935	—	150	150	Sahjanwa, United Provinces
Juggilal Kamlapat	1931	100	400	500	Cawnpore, ..
Mahaswari Devi	1934	29	191	220	Cawnpore, ..
<b>Total</b>	—	452	2,737	3,189	
<b>Grand Total</b>		43,048	25,368	68,416	

APPENDIX B.  
*Working Hour Agreements of Jute Mills in India.*<sup>1</sup>

Year	Working Hours	Limitation of Looms
1872	Up to 1872 mills worked between 6 A.M. and 5 P.M. with two breaks at 9 to 10 A.M. and 1 to 2 P.M., i.e. 10 hours a day.	—
1873 onwards	Mills worked throughout the day for 12 hours under a crude system of relieving squads.	—
1886 From 15th February onwards	The first agreement for six months dating from 15th February was subsequently renewed at intervals without a break for 5 years up to 15th February, 1891. During these 5 years the extent of the short-time varied between 4 days a week, 9 days a fortnight and 5 days a week. The exceptions to this agreement were Hooghly and Serajgunge Mills.	An important feature of the agreement was an undertaking by the parties not to increase their spinning power during the currency of the agreement. Beside short-time working, 10% of the sacking looms were shut down for a short period in 1890.
1895	Electric light came into general use from this year and regular multiple shift system of working was followed, machinery working for 15 hours per day.	
1899 1st April onwards	A six months' agreement came into force on 1st April 1899, but it lasted for 2 months only.	In some cases over 25% of the machinery was rendered idle for lack of workers owing to outbreak of plague.

1. Regular and detailed information is available since March 1921 only.

Note—Indian Jute Manufacturers Association was founded in 1884; the name was changed to Indian Jute Mills Association in 1902.

APPENDIX B (Contd.)

Year	Working Hours	Limitation of Looms
1906 From 1st January to 30th June	Mills agreed to curtail production by stopping the electric light, and worked from sunrise to sunset for 6 months, from 1st January 1906.	—
1908 15th March to 1909 30th September	Extension in some mills and establishment of new mills augmented productions to such an extent that it was found expedient to work 5 days a week.	—
1910 May to August	Due to absence of unanimity among members of the Association, short time working of 5 day week was postponed from January till April 1910. An agreement to work 5 days a week was in operation from May to August.	—
1910 1st September to 1912 30th June	The agreement to work five-day week was continued with some variations.	—
1921 1st April to 1929 30th June	Mills worked 54 hours per week (No restriction)	
1929 1st July to 1930 30th June	Mills worked 60 hours per week (No restriction)	
1930 1st July to 30th September	Mills worked 54 hours per week (No restriction)	

APPENDIX B (Contd.)

Year	Working Hours	Limitation of Looms
1930 1st October to 1931 28th February	Mills worked 54 hours per week but closed down for one week per month.	
1931 2nd March to 1934 3rd October	Mills, with certain exceptions, worked 40 hours per week.	15% of the total looms sealed up. The sealing was effected on Hessian looms of 40" reed space or over. In May 1932 the new mills were allowed to work 54 hours per week after the personal intervention of Sir John Anderson, the then Governor of Bengal.
1934 1st November to 1935 30th April	Mills worked 40 hours per week.	12½% of the total looms remained sealed.
1935 1st May to 4th August	Mills worked 40 hours per week.	10% of the total looms remained sealed.
5th August to 10th November	Mills worked 40 hours per week.	7½% of the total looms remained sealed.
1935 11th November to 1936 31st March	Mills worked 40 hours per week.	5% of the total looms remained sealed up to 16th February 1936, after which they were released.
1936 1st April to 30th June	Mills worked an average of 46.28 hours per week.	—
1st July to 3rd August	Mills worked 50 hours per week.	—

APPENDIX B (Contd.)

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Year	Working Hours	Limitation of Looms
1936 4th August to 1937 28th February	Mills worked 54 hours per week (No restriction)	—
1937 1st March to 1938 25th September	All other restrictions withdrawn and majority of mills worked 54 hours per week.	—
1938 26th September to 1939 19th February	Mills worked 45 hours per week with the excep- tion of those with 175 looms or under which were permitted to work 72 hours per week.	—
20th February to 30th July	Mills worked 45 hours per week but those having registered complements of looms not exceeding 220 worked 72 hours per week.	—
31st July to 12th September	Mills worked 40 hours per week.	Mills were required to seal the number of looms necessary to give the requisite number of loom hours on the basis of 45 hours per week with 20% hessian loom and 7½% sacking looms sealed.
13th September to 24th September	Mills worked 45 hours per week	All looms previously sealed were released.
25th September to 2nd November	Mills worked 54 hours per week (No restriction)	—

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APPENDIX B (Contd.)

Year	Working Hours	Limitation of Looms
1939 3rd November to 1940 7th April	Mills with more than 220 looms worked 60 hours a week—others 72 hours a week. Exemption granted from the provisions of Indian Factories Act.	—
8th April to 18th August	Mills worked 54 hours per week (No restriction)	—
19th August to 31st August	Mills worked 45 hours per week	—
1st September to 30th November	Mills worked 45 hours per week with one week closed in every four.	—
December.	Mills worked 45 hours per week with second week of December closed.	—

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- Sources—1. *Romance of Jute* by D. R. Wallace.  
 2. *The Jute Crisis* by B. D. Bhattar and L. Nemenyi.  
 3. *Reports, Indian Jute Mills Association, 1921 to 1940.*

APPENDIX C.

*No. 8775-Com. dated Calcutta, 12th August, 1935.*

FROM THE GOVERNMENT OF BENGAL, FINANCE, COMMERCE  
AND MARINE DEPARTMENTS,

To—The Indian Jute Mills Association.

I am directed to refer to your letter No. 1559 of 26th July, 1934. In that letter the Association drew the attention of the Government of Bengal to the very serious consequences that would follow any break-down in the existing arrangements for the restriction of jute manufactures and enquired whether Government would be prepared to support a proposal to give statutory force to the terms of the arrangement regarding working hours, extensions, etc., which exists at present between the members of the Association and between the Association and certain outside mills and to make them applicable to all jute mills situated in Bengal.

The Association's proposal has been most carefully considered by the Government of Bengal and the Government of India and the decision which has been reached is that Government are unable to support the proposal put forward by the Association for the restriction of the output of jute manufactures by legislative action. The reasons for this decision and the conclusions arrived at by Government are embodied in the enclosed memorandum.

\* \* \* \* \*

*Memorandum.*

1. The basic fact from which arguments both for and against restriction must start, is that the potential capacity of the jute mills for production is greatly in excess not merely of the present demand but of any possible demand that need be considered. The production of manufactured goods is at present somewhat below the figure for the years immediately preceding the war. In the interval, leaving out of account any increase in efficiency, the capacity has been increased by an addition of about 60 per cent. to the number of jute mills, of about 90 per cent. to the number of looms and about 60 per cent. to the number of spindles. Even in 1912-14 the mills were working for about half the possible weekly hours, and the machinery then in existence was capable of meeting a substantially higher demand than India had known before or has known since. To-day the disparity between actual and potential is immense. The existing demands could possibly be supplied by a quarter of the machinery now available, and the highest demand ever reached so far could probably be satisfied by a third of the existing mills.

2. This situation has been met not by any reduction in the number of enterprises, but by restricting production in such a fashion as to keep as many mills working as possible and to secure for them a price dependent for its maintenance on that restriction. The consumers of the goods are, in fact, being asked to provide profits on an amount of capital far in excess of the needs of the industry and at the same time to defray the extra charges involved in the maintenance of many unnecessary mills. Moreover, the level of profits so secured acts as a constant temptation to fresh enterprise, so that the threat of new mills or of a breakaway on the part of existing mills suffices to induce something approaching panic among many of those in the industry. The position is, in fact, completely unstable.

3. The solution proposed by the manufacturers, namely, imposition under statute of restrictions on the productive capacity of the mills, is designed to continue, temporarily or permanently, this state of affairs, and is open, in view of the Government of India, to serious objection. They regard it as opposed to the true interests of the community and not calculated to secure the best interests, in the long run, of even the jute industry itself.

4. So far as the jute mills themselves are concerned, the Government of India recognise that restriction, by securing an artificially high price for the manufactured product, produces much higher profits for the time being than would be secured by free competition, and that it probably enables a number of mills which would otherwise close down to continue in profitable operation. But in the long run the effects are less happy. The industry depends mainly on exporting its products, and is in competition abroad with foreign manufacturers who are not subject to the agreement and would not be subject to any Indian legislation. The effect, therefore, of measures which curtail Indian production and secure a higher price than free competition would yield, is to give a competitive advantage to manufacturers abroad. It is significant that between 1932-33 and 1934-35 there has been a big increase in the amount of raw jute exported and an extremely small increase in the amount of Indian manufacture, indicating that while Indian manufacture has been restricted foreign manufacturers have secured the bulk of the increased world demand. Further the maintenance of a high price for the product tends to encourage the use of and the search for substitutes ; this tendency is already evident.

5. The prime need of the industry, in the view of the Government of India, is better organisation. If the industry were prepared to rationalise itself by concentrating production in a limited number of mills securing adequate use of their machinery, and were content with reasonable profits on that amount of capital which is necessary to

meet the demand, the results would be far-reaching. The consequent reduction in the price should enable the industry to recapture a larger share of the foreign market for manufactured goods. It would provide the best possible insurance against the use of substitutes for jute products. It would afford a much-needed incentive to increased efficiency and technical progress. And it would remove the constant threat of a severe fall in prices, which might result from the starting of new mills or from a breakaway from the agreement. Entrepreneurs would be reluctant to enter a field consisting of established mills organised to face competition, for the possibility of gaining an advantage by a resort to long hours would have disappeared. Unfortunately, since the present agreement was reached in 1932, the industry appears to have taken no steps to place itself in a more stable position ; and the solution suggested by the industry so far from offering any guarantee of reorganisation, would tend to postpone it.

6. Passing to the effect on the cultivators, the Government of India believe that the existing agreement and the previous agreements have been directly opposed to their interests. They have always recognised the possibility that a serious disturbance of the market might have, for the time being, adverse repercussions on the cultivators' position. The cohesion among the jute manufacturers and the large stocks they carry place them in a strong position ; and a crisis which resulted in curtailing purchases from the cultivators might result in serious loss to them. But in the long run the latter stand to gain from an increased demand for their product, and even a time of resort to freer competition would not, in present circumstances, be likely to injure them. For the immediate effect would probably be a substantial rise in production, and the effect on the prices of raw jute of the increased demand for it would be enhanced by the recent reduction in the crop.

7. The Government of India recognise that if a period of keen competition was followed by a crisis involving the closing of some mills, the cultivators and other interests would probably suffer for the time being. For there would probably be a reduction in the demand for raw jute, and there would be other repercussions on the economic life of the presidency. But the cultivator is no better off under a policy of restricted production, which tends to reduce the demand for his product over the whole period of its operation. The price he receives for his crop is affected by the demand for jute and depend ultimately on the relation between the supply and the world demand. In the view of the Government of India, it is a fatal objection to the manufacturers' proposals that under them the interests of the cultivators and of the other parties affected would receive no statutory protection. If any legislation were undertaken for the benefit of the manufacturers,

provision for the safeguarding of the cultivators would have to be an essential element in it.

8. Nor are the cultivators the only class who would gain from increased production at more economical rates. Restriction of production means restriction of employment. The numbers employed in the jute mill industry have been greatly reduced in the last few years and only a part of this reduction can be attributed to the replacement of child labour by adult labour and other administrative improvements. Further, the reduced numbers employed have been obliged to work for reduced hours, and there is little indication of their having appreciably benefited from the improvement in the mills' position in the last two years. In short, the re-organisation of the industry on stable and healthy lines would be of advantage to all interested in it and to the community as a whole.

9. The question has hitherto been discussed as an isolated one ; but the Government of India cannot overlook the fact that if they agreed to restrict production for the jute manufacturers, those engaged in other industries could claim similar assistance. There are very few industries in which potential production is not greatly in excess of actual demand, and in which a measure of protection from internal competition would not result in temporary benefit to the capitalists concerned. Moreover, many industrialists could plead that they had a stronger case than the jute manufacturers, as they are virtually unorganised and it would be difficult to justify the limitation of such assistance to one of the most strongly organised industries in India. It is true that statutory assistance has already been given to restrictive schemes for certain primary products, but the restrictions have been designed solely with a view to exports and have been consequent to international agreement.

10. To sum up, the Government of India recognise that the present position of the jute manufacturing industry is unsatisfactory. If the industry were able to formulate a scheme for its rationalisation, and felt the need, for the satisfactory inception of the scheme, of legislation, they would be willing to consider the introduction of such legislation and the inclusion in it, if necessary, of temporary restriction on the erection of new mills or other activity. But their consent would in any case be subject to the following conditions:—

- (1) that the scheme of rationalisation had the approval of a substantial majority of the mills, and was regarded as satisfactory by Government, and
- (2) that the interests of the community in general and cultivators in particular were adequately protected.

\* \* \* \* \*

APPENDIX D.

*Different Sizes and Weights of Hessians.*

HESSIANS

Size & Weight	Porter & Shot	Packing
40" x 8 oz.	9/10	I/B. 2000 Yds.
40" x 7½ "	9/9	" " "
40" x 7 "	8/9, 9/8	" " "
40" x 8½ "	9/10	" " "
40" x 9 "	9/10	" " "
40" x 9½ "	10/11, 11/10	" " "
40" x 10 "	11/12	" " "
40" x 10½ "	11/12	" " "
45" x 11 "	11/12	" 1000 "
50" x 10 "	9/10	" " "
40" x 12 "	11/12	" 2000 "

HESSIANS BAGS

Size & Weight		Porter & Shot	Wgt. per bag i
56" x 28 Hd.	Ex. 8 oz./40	9/10	17.88
54" x 28 "	" 8 oz./40	9/10	17.26
54" x 27 "	" 8 oz./40	9/10	16.65
49" x 27 "	" 8 oz./40	9/10	15.15
59" x 30 "	" 8 oz./40	9/10	20.16
49" x 30 "	" 8 oz./40	9/10	16.83
47" x 30 "	" 8 oz./40	9/10	16.16
50" x 26 "	" 8 oz./40	9/10	14.87
48" x 26 "	" 8 oz./40	9/10	14.3
58" x 33 "	" 7½ oz./40	9/9	20 oz.
do "	" 10½ oz./40	11/12	28 "
49" x 27 "	" 9½ oz./40	11/10, 10/11	18 "
40" x 22½ "	" 8 oz./40	9/10	10.375

APPENDIX E.  
Different Sizes of Gunny Bags.

Name	Size	Weight	Porter & Shot	Packing	Stripe
A. Twill	44" x 26½"	2½ lb.	8/9	300/4 pc.	3 Blue stripes.
Liverpool Twills	do	2½ "	8/8	250/3 "	3 do do
No. 2 Twills	do	2½ "	6/8, 6/9	300/4 "	3 do do
B. Twills	do	2½ "	6/8	300/4 "	3 Blue dry sewn.
do	do	2 "	6/7	300 "	3 do do
Cuban Sugar Bags	48" x 29"	2½ "	7/9, 8/8	400 "	2" Blue dry sewn.
do do	50" x 30"	2½ wip.	7/9, 8/9	400 "	2" Blue T. S.
Egypt Sugar Bags	48" x 28"	2½ lb.	6/8	400 "	2" Blue or Magr. T. S.
Sugar Bags	do	3/3½ "	8/9	250 "	2" Blue or Pl. T. S.
Egypt Daira Twill Bags	42" x 29"	2½ "	8/8, 6/8	500 "	2" Blue red, P.
Coffee Twill Bags	45" x 30"	3½ "	6/8	250 "	Plain.
do do	40" x 28"	2½ "	8/8	300 "	2" B. 4 Red Blue.
do do	do	3 "	8/9	300 "	P. 2" bl. Seam sewn.
Australian Corn Sacks	41" x 23"	2½ "	8/9	300 "	Plain.
do Old do	44" x 26½"	2½ "	8/9	300 "	3 Blue.
New Zealand Sacks	48" x 26½"	2½ "	8/9	250/3 "	3 Blue.
English Twill Sacks	53" x 27"	3 "	8/8	250 "	3 Blue or plain.
Egypt Grain Sacks	60" x 30"	5 "	8/9, 6/8	200 "	2" Magt. Tar sewn.
do do	do	4/3½ "	8/9, 8/8	250 "	2" do do
do do	do	3½ "	6/8	250 "	2" do do
Wool Packs Dump	42" x 27" x 27"	11½ "	8/8	50 "	Plain ¼" Red.
Australian Wool Packs	54" x 27" x 27"	12 "	8/9	50 "	do do
Sydney do	do	11½ "	8/9	50 "	do do
do do	do	11½ "	8/9	50 "	do 2" Blue.
Cape Wool Packs	do	10 "	8/9	50 "	do ¼" Red.
Chaff Packs	do	5/5½ "	5/6, 5/7	100 "	do or 3 Blue.
do	do	6/6½ "	5/7	100 "	do do

Name	Size	Weight	Porter & Shot	Packing	Stripe
Twill One Pocket	27" x 19"	20 oz.	8/9	500/8 ..	do Tar Sewn.
do do	30" x 20"	24 ..	8/9	500/8 ..	do do
do do	do	28 ..	8/9	500/8 ..	do do
Cement Bags	33" x 23"	28 ..	8/8	500 ..	Plain.
do	36" x 22"	30 ..	8/9	500 ..	do
Onion pockets	40" x 26½"	12 lb.	9/10	1000 ..	3 Blue T. S.
Wheat Bags	38" x 22"	12 oz.	11/12	1000 ..	Plain.
Australian Bran Bags	49" x 30"	20 ..	11/12	600 ..	do
English do	49" x 27"	18 ..	11/11	1000 ..	do
Fiji Pockets	36" x 22"	16 ..	11/15	800 ..	do
Cotton Pack	85" x 45"	3 lb.	9/10	250 ..	do Tar Sewn.
Heavy C. Bags	40" x 28"	2½ ..	8/9	400 ..	Plain.
do do	do	2¼ ..	8/9	400 ..	2" Blue.
do do	48" x 29"	2¼ wip.	8/9	400 ..	2" Green.
C. Bags	40" x 28"	2½ lb.	8/9	400 ..	Plain or 2" Blue.
Light C. Bags	do	2 ..	7/9, 8/8	400/5 ..	do do
E. Bags	do	1½ ..	5/8	400/5 ..	do do
do	40" x 29"	1½ ..	5/8	400/5 ..	do do
Light E. Bags	40" x 28"	1½ ..	5/7	400/5 ..	do do
Nitrate E. Bags	35" x 26"	1½ wip.	5/8	500/6 ..	do do
K. Bags	40" x 28"	1½ lb.	6/8	500 ..	do do
D. W. Flour bags	56" x 28"	2½ ..	8/8, 7/9	300/4 ..	Plain Red, Blue.
do Salt Bags	45" x 26"	1½ ..	6/8	500 ..	3 Blue.
do do	do	2 ..	6/8	500 ..	3 do
do Nitrate Bags	33" x 24"	25 oz.	8/8	600 ..	Plain.
do Potato do	38" x 28"	2½ lb.	3/7	300 ..	do
Grass Seeds Bags	58" x 33"	1½ ..	9/9	500 ..	do Tar Sewn.
do do	do	1½ ..	11/12	500 ..	do do



APPENDIX F.

Amended 15th March, 1936

**CALCUTTA JUTE FABRICS SHIPPERS ASSOCIATION**

*Standard U. K. Jute Goods Contract Form, 1935*

.....193

Messrs.....  
.....

Dear Sirs,

We have this day ..... you, subject to the conditions endorsed hereon,

about ..... (Yards/bags) as under:— 1

Description .....

Size .....

Weight .....

Porter & Shot .....

Hemmed or Unhemmed .....

Stripped or plain .....

Packing, make up .....

Sewing .....

Price % Yds./bags .....

Quality at time of shipment guaranteed to be fair average Calcutta standard make, weight, size, porter and shot.

Shipment from Calcutta ..... by steamer and/or steamers and/or power vessel and/or vessels, direct and/or indirect, with or without transshipment to.....

Cost, Freight and Insurance (the latter to be with particular average, including sweat and fresh water damage, and to be for a sum representing gross invoice amount plus 10%.....average to be payable if amounting to 3% on each bale as if separately insured or on the whole). Insurance to include war risk. Any expense for covering war risk exceeding ½% to be on account of buyers' Export duty based on current rates ; any alteration to be on buyers' account.

Payment:—

.....  
.....

Upon the terms and conditions as detailed on the reverse:—

*(Terms and Conditions Item 1 to 20 not printed)*

## APPENDIX G.

### *Particulars relating to Consular Charges to vise Documents relating to the Exports of Goods to their Respective Countries.*

#### *America.*

The fee for a consular invoice issued either in triplicate or quadruplicate \$2.50 and for each certified extra copy a charge of \$1.00 is made. For certificate covering shipments of American goods returned to the United States a fee of \$1.00 is charged. There are a number of special certificates which are occasionally issued in connection with the shipment of such goods as seeds, fertilizers, hide fleshings, hides and skins, and a number of other commodities, and for these there is no charge if the merchandise is covered by a consular invoice. If the merchandise is not covered by an invoice there is, in most cases, a charge of \$1.00 for this service.

These are the only regular charges made in connection with the shipment of merchandise to the United States, though it sometimes happens that shipper wishes to make an affidavit regarding a particular shipment or the circumstances surrounding the same, and for administering an oath a charge of \$2.00 is made. All fees collected by this Consulate-General may be paid either in American currency or in rupees at the current rate of exchange.

#### *Argentine.*

It is necessary for shippers to present to this Consulate for legalisation before the sailing of the relative vessel the following documents in connection with all shipments to Argentine:—

1. Three stamped and two unstamped bills of lading signed by the steamer agents,
2. Four consular invoices signed by the shippers,
3. Four commercial invoices signed by the shippers. Consular fees payable:—

	Rs. As. P.
1. For legalising each set of 3 stamped bills of lading ...	18 0 0
2. For each set of consular and commercial invoices:—	
Up to £200 in value ... ..	3 0 0
From £200/£1,000 in value ... ..	6 0 0
From £1,000/£2,000 in value ... ..	9 0 0
Over £2,000/- in value ... ..	12 0 0
Additional copies:—	
Each additional stamped bill of lading ... ..	4 8 0
Each additional commercial invoice ... ..	12 0 0

Late fee.—Ordinarily documents are returnable on the day following the date of presentation. If, however, documents are required to be legalised and delivered on the same day, the extra fee per set is Rs. 10-12-0.

*Belgium.*

The consular fees for the vising of documents relating to exports of goods from India to Belgium are not necessary except the bill of health.

*Bolivia.*

Below are particulars of the respective Consular charges for vising of documents etc. in connection with this Consulate:—

Legalization of consular invoices—6% of the f.o.b. value of the merchandise.

Legalization of power, documents and account sales—Rs. 5-0-0 (7/6d.) each.

Consular invoice forms Rs. 8-6-0 (12/6d. set of 5).

For each consular invoice form Rs. 1-11-0 (2/6d.) each.

Legalization of other documents or extra copy of consular form Rs. 5-0-0 (7/6d.) each.

The consular fee for legalising consular invoices is 6% of the f.o.b. value of the merchandise, plus the cost of packing (but not including freight, insurance and shipping charges). 2½% of this 6% fee is collected by this Consulate.

Bolivian consular invoices are necessary in respect of all goods shipped to Bolivia also for goods despatched by parcel post when the value of the whole sending to Bolivia exceeds Bolivian 100.

*Brazil.*

The current fees charged by this Consulate for legalizing consular invoices in accord with the declared value of merchandise, excluding the freight and other charges, are as follows:—

Invoices of the value inferior to American \$25.00—Gratis.

Invoices of the value up to American \$1000.00—4\$000 (i.e. milreis gold).

For every additional \$500.00, or fraction thereof—1\$000 (i.e. 4. milreis gold).

Legalisation of Commercial invoices—Gratis.

Legalization of other documents for banking transactions—Gratis.

Exchange rate—Rupees 4/- per milreis—1\$000 gold).

Invoices will be accepted during working hours only and will be returned 24 hours after presentation.

Office hours—

10 A.M. to 3 P.M. week days.  
9 A.M. to 12 noon Saturdays.

*China.*

A Chinese Consular Invoice is required to accompany any shipment of merchandise to China the value of which exceeds Rs. 180 F.O.B. The fee of certification for such invoice is Rs. 9-14-0. This fee may be subjected to alteration every three months.

*Cuba.*

Particulars of the Cuban Consular tariff governing documents covering exports of goods to Cuba.

*Despatch of ships to Cuba.*

Art: 1.—For the despatch of any vessel national or foreign, destined to Cuba, the charge should be the following:—

(a) Vessels of less than 100 tons net	...	U. S.	\$ 10.00
(b) Vessels of 100 tons net or more	...	U. S.	\$ 15.00

When vessels take freight or passengers to Cuba, they should also pay:—

In the part of origin for each 100 tons net or fraction up to 5,000 tons	...	U. S.	\$ 1.00
In all others ports of schedule for each 100 tons net or fraction up to 5,000 tons	...	U. S.	\$ 0.50
There should also be paid for each 100 thousand Ks. or fraction of 100 thousands Ks. of cargo shipped to Cuba on each port; according to manifest of the same	...	U. S.	\$ 1.00

Visae of consular invoices and bills of lading:—

Art: 21.—The total value declared in the consular invoice is reduced to U. S. \$; and on this reduction	...	5% is charged.
Art: 22.—Any copy of consular invoice duly legalised	...	U. S. \$ 0.50
Art: 22A.—Visae of set of Bill of Lading corresponding to consular invoice	...	U. S. \$ 1.00

Administrative Proceedings:

Art. 30.—For attesting of the signature in any kind of documents to have an action in Cuba	U. S. \$ 3.00
--	---------------

*Ecuador.*

The following documents are required in the case of shipments to Ecuador.—

1. *Consular Invoices.*—One set consisting of one original and 5 copies for each B/Lading, the cost of which is As. 0-9-0 per set. Of these only the original is returned to the shipper. If additional legalised copies are required, a fee of Rs. 2-8-0 per copy is payable. The fee for legalising Consular Invoices is 5% of the f.o.b. value of the goods and is payable by the shipper on presentation of the documents.

2. *Consular Manifests.*—A set consisting of one original and 5 copies must be taken out by the Steamship Co. or their Agents which may cover the whole shipment going forward in one steamer. The cost of each set is As. 0-9-0. The fee for legalising the document is 1½% of the f.o.b. value of the goods and is payable by the Steamship Co. or their Agents on presentation of the documents.

3. *Certificate of Origin.*—One set consisting of one original and 2 copies must be taken out for each B/Lading which is to be certified by the Chamber of Commerce first and then by this Consulate. The fee for legalising this document is Rs. 6-0-0 only.

*Siam.*

The following is the list of the fees at present charged by this Consulate:

For the purpose of conversion, 2.22 Baht=1 W.S.A. dollar, and for the rate of exchange between U.S.A. Dollars and local currency the daily quotation may be taken.

*Table of fees levied at Siamese Legations and Consulates.*

Fees	BAHT	U.S.A. Dollars. Bt. 2.22 = \$ 1.
1. For legalising a document: The legalisation of more than one signatures on the same document shall be considered as only one legalisation	4.00	1.8
2. For certified copies of any kind of document for each document or for each page of at least 20 lines	1.50	.68
3. For making or verifying translations of documents of any kind: for each document or for each page of at least 20 lines	3.00	1.35
4. For attesting a Power of Attorney	4.00	1.8
5. For drawing up a Power of Attorney, if not exceeding 200 words	6.00	2.7
If exceeding that number, for every subsequent 100 words or fraction thereof	4.00	1.8

APPENDIX H.

*Jute Goods consumed in India, their uses and centres of distribution.*

Province	Commodities or articles for which jute goods are used as containers	Types of bag and cloth	Distributing centre
Assam	Rice, maize and pulses Tobacco Tea General packing	E. Bags, Heavy Ceas and B. Twills. B. Twills bags and E. Cloth bags. B. Twill and E. Cloth for wrapping chests. Withering cloth for drying leaves. Hessians as above. Tarpaulin and canvas.	Calcutta sends practically all goods required to the larger markets for distribution. In the case of cloth for tea gardens it is consigned direct. There is no larger distributing market in the province.
Bengal	Rice and pulses Tobacco and chillies Mustard Tea Salt General packing	E. Cloth, B. Twills and Heavy Ceas. E. and B. Twill cloth. D. W. Bags and B. Twills. E. Cloth and Withering cloth. D. W. Salts. Hessians of above sizes, tarpaulin and canvas.	Calcutta supplies direct to any market. Small stocks are held at many towns for retail sale in villages. Large consumers obtain their supplies direct from Calcutta mills or dealers.
Bihar	Sugar Wheat, maize and pulses Rice Tobacco General packing Cement	A. Twills and Sugar bags. B. Twills and Heavy Ceas. E. Bags and B. Twills. E. Cloth and B. Twill cloth. Hessians as above.	A fairly high percentage of the goods used are made by the mills in this province. Calcutta supplies cloth and certain bags but not in great quantity. The principal distribution point is Katihar at which two mills are located.
Sind and N. W. F. P.	Wheat and pulses Groundnuts Cotton seeds General packing Carpet packing	A. and B. Twills. Hessian bags and B. Twills. B. Twills. Hessians as above. Yarn of various weights.	Karachi is the main centre for the receipt and distribution of jute goods. Practically all supplies are sent by sea from Calcutta.
Punjab	Wheat and other cereals Oilseeds: linseed and cotton Sugar Fine rice Carpets and rugs General packing—piece goods Silk and small articles	D. W. Bags 40 to 48 x 28. B. Twills and Heavy Ceas. A. Twills and Sugar Bags. A. and B. Twills. Yarn 10 to 12 lb. Twine. Hessian 40" to 50" in 7½ and oz. 40. " 40" to 45" in 10½ oz. 40. Canvas.	Lahore is the principal market in this area, but a considerable quantity is despatched direct from Calcutta and Cawnpore to the smaller centres and mills.
United Provinces	Wheat, maize and other cereals Oilseeds: mustard, linseed & cotton Sugar General packing Carpets and Durries Tobacco	D. W. Bags—40 to 48 x 28. Heavy Ceas and B. Twills. A. Twills and Sugar bags. Hessian 40" to 50" in 7½ and 8 oz. 40". " 40" to 45" in 10 oz. 40". Hessian—size from 39" x 19" to 32" x 22". D. W. Bags 40" to 48" x 28" wide.	Cawnpore mills provide a fairly large percentage of this province's requirements. Calcutta supplies direct and through agents in the larger towns.
Bombay Presidency and South West India	Wheat, jowar, bajra, maize and other cereals Chillies Oilseeds: cotton, linseed, mustard Salt Sugar Tobacco Groundnuts General packing	A & B Twills. B. Twills and Heavy Cee bags D. W. Salt bag. A. Twills and Sugar bags. B. Twill cloth & bags & E. Cloth. Hessian bags. Hessian 40" to 40" 7½ and 8 oz. 40. " 40" to 45" 10½ oz. 40	Bombay is the centre for distribution. The bulk of goods being sent here from Calcutta by sea-route.
Madras Presidency and South East India	Rice Groundnuts (when bags used) Tobacco Salt General packing	E. Bags and Heavy Ceas. K. Bags and cotton packs. B. Twills, C. Bags and E. Cloth. D. W. Salt bags.	Madras is the principal point at which Calcutta made goods are imported and distributed. The mills in that area supply a fairly high proportion of the provincial requirements.
Central Province and Berar	Wheat, maize and other cereals Oilseeds: cotton, mustard, linseed Sugar General packing Cement	D. W. Bags and B. Twills. B. Twills and Heavy Ceas. A. Twills and Sugar bag. Hessians as above.	The bulk of jute goods consumed in this area sent direct to the small markets for sale and distribution or to the mills, by rail from Calcutta. Nagpur is the largest town and some stocks are held there by dealers.
<i>Indian States<sup>1</sup></i>			
Hyderabad	Wheat Rice Jowar Linseed Groundnuts Sugar Gur Cotton Cement	D. W. Flour bags. B. Twill bags. No. 2 Twill bags. Hessian cloth (60 in. wide).	Wholesale merchants, mills and factories receive their supplies from Calcutta through their own agents. Stocks are maintained at Hyderabad, Aurangabad, Jalna and Raichur by the wholesale merchants and distributed into other consuming centres from these places.
Baroda	Rice Sugar Cotton Tobacco products	D. W. Flour bags. Liverpool Twill bags. Heavy Cee bags Hessian cloth	There does not exist any direct business between the State and manufacturing centre and the required jute goods are imported from Bombay. Big stocks are maintained by the wholesale dealers in Baroda from where the goods are distributed.
Mysore	Rice Pulses Coffee Sugar Copra	D. W. Flour bags E. Bags B. Twill bags. Liverpool Twill bags	Gunny bags and cloth are imported from Nelliur, Vizianagram and Calcutta into the State and the wholesale dealers maintain their stock at Mysore and Krishnarajnar from where they are distributed into the consuming centres.
Patiala	Jowar Gram Mustard Chillies Sugar Cotton	D. W. Flour bags B. Twill bags A. Twill bags Liverpool Twill bags Hessian cloth (45 in. wide and weight 9 oz. per yd.)	Supplies are received from mills located in Calcutta and Cawnpore through agents and stocks are held by wholesale dealers at Patiala from where the goods are distributed.

1. Information for other States is not available.

Fees	BAHT	U.S.A. Dollars.
		Bt. 2.22 = \$ 1.
6. For attesting the execution of a will ...	6.00	2.7
7. For drawing up a will, if not exceeding 200 words ...	10.00	4.5
8. If exceeding that number, for every subsequent 100 words or fraction thereof ...	6.00	2.7
9. For certificate for a persons's identity ...	4.00	1.8
10. For uniting documents and attaching consular seal to the fastening ...	2.00	.9
11. For each consular seal affixed to a document, packed or article when no signature is required ...	2.00	.9
12. For issuing a certificate of origin and other certificate or declaration of a similar nature ...	4.00	1.8
13. For issuing or certifying a Bill of Health ...	5.00	2.25
14. For fixing consular signature and seal if required to a ship's manifest ...	8.00	3.6
15. For granting a provisional certificate or nationality to ship ...	10.00	4.5
16. For legislation or attestation, if required, for the clearance inward and outward of a vessel ...	2.00	.9

## For issuing:—

	Rs.	As.	P.
Ordinary Visa valid 1 year ...	...	...	5 5 0
Transit Visa valid 1 year ...	...	...	0 10 0

APPENDIX I.  
*Jute substitutes and competitors*

(a) VEGETABLE FIBRES

Scientific Name	Popular Name	Where grown and developed	Uses and other important features
1. <i>ABROMA AUGUSTA</i>	—	British Uganda	Experiments are in progress to make it suitable for commercial uses.
2. <i>ABUTILON AVICENNÆ</i>	Manchurian Jute	Manchuria (China)	This fibre is similar to Sisal, but as yet not produced in a form comparable to jute yarn, though experiments are proceeding.
3. <i>AGAVE FURCRÆ</i>	Fique or commonly known as Cabuya	Colombia	Resembles Sisal and used for making cordages, coffee sacks, packing cloth and the upper parts of shoes. An important competitor.
4. <i>AGAVE SPEC.</i>	Sisal	Dutch East Indies, Bahamas, Mexico, Haiti, Philippines, East Africa, New Zealand and Morocco.	Used for binder twines, all types of cordage, ropes and heavy bagging. An important competitor.
5. <i>AGAVE FOURCROYIDES</i>	Henequen	U. S. A., Canada.	Is used alone or mixed with Sisal to make all classes of ropes and twine. Very strong.
6. <i>ANTHISTIRIA GIGANTA</i>	Ulla grass	India (U. P.)	Replaces jute to some extent as a packing medium.



Scientific Name	Popular Name	Where grown and developed	Uses and other important features
7. <i>BEMERIA NIVES</i>	White leaved Ramie (China grass)	China, Formosa, Java, India, Italy, Brazil, Australia.	Ramie is stronger than jute or flax and is used for fine twines, tapestries, linings of many types, canvas, sail cloth and other fabrics.
8. <i>BEMERIA TENACISSIMA</i>	Green leaved Ramie or Rhea		
9. <i>CANNABIS SATIVA</i>	Hemp (Ganja in India) (Canapa in Italy)	India, Italy	Its use is limited in India to twine and rope-making. Produced on a large scale; is being used as a substitute for jute. A serious competitor.
10. <i>CEPHALONEMA POLYANDRUM</i>	Punga	Belgian Congo	Used commercially as admixture with other fibres including jute by Belgian spinners. May be developed and become a serious competitor to jute.
11. <i>COCOS NUCIFERA</i>	Cocoanut fibre	Indo-China	Used to manufacture bags to export rice and other cereals.
		India	Extensively used in making mats, ropes, carpets, etc.
		France	Attempts were being made to produce bags from this fibre which was imported from the West Indies and Dutch East Indies. It is reported that the bags produced were considerably stronger and very much cheaper than those made from jute. A serious competitor.

Scientific Name	Popular Name	Where grown and developed	Uses and other important features
12. CROTOLARIA JUNCEA	Sun Hemp	India	Used for cordage and ropes of many types.
HIBISCUS CANNABINUS	Kenaf	Manchukuo (China)	At present only heavy coarse cloth can be produced, but experiments are proceeding.
	Brown Hemp (Bimli Jute)	South Africa	Still under experiment and has not yet been used commercially.
	Canamo de la India (Indian Hemp or Bimli Jute)	Peru (South America)	It is understood that mills to manufacture twine and bags—may be erected in the near future. A serious competitor.
13. GOSSYPIUM SPEC.	Cotton	U. S. A.	The next serious competitor to jute amongst all fibrous plants. Attempts are continually being made to enlist Governmental aid in U. S. A. to promote the use of cotton at the expense of jute and recently, specially prepared fabrics were demonstrated showing the superiority of cotton over jute for such purposes as (i) lining and reinforcing materials for canals and ditches, (ii) covering for fruit during ripening period and curing processes, (iii) roofing and side wall materials in building construction, (iv) road surfacing fabrics and (v) as linoleum backing, in addition to ordinary containers for all classes of produce.

Scientific Name	Popular Name	Where grown and developed	Uses and other important features
14. HIBISCUS BIFARCATUS	—	Brazil (South America)	Cloth is prepared from this fibre and it is reported to be more resistant and hard wearing than jute.
15. HIBISCUS CANNABINUS	Mestha (Bengal) Java jute. (Java)	India, Java	Used in admixture with flax and hemp for the manufacture of cloth, ropes and cordage.
16. HIBISCUS ESCULANTUS	Hibiscus fibre	Salta (U. S. A.)	Has been used successfully in the manufacture of yarn and cordage.
17. HIBISCUS FEROX	—	Brazil	Is considered to have as good spinning qualities as jute. Extent of cultivation not known.
18. HIBISCUS KITAIBELIFOLIUS	—	British Uganda	Attempts to make it suitable for spinning are in progress. Results not known.
19. HIBISCUS SABBARIFFA	Roselle (Patwa in India)	India, Italian East Africa, Java	Used for rope and cord making. Has been developed during the last six years by subsidy from Dutch Government and is now one of the most serious competitors to jute. Two mills have been erected to manufacture sugar bags and their output in 1939 being approximately three million bags, representing a loss to the Indian trade of nearly 15% of the normal annual consumption in Java.

Scientific Name	Popular Name	Where grown and developed	Uses and other important features
20. HYPHAENE THEBAICA	'Dum'	Eritrea	Fibre extracted from the leaves of this plant is used to make twine, rope, packing cloth and bags. It is understood that this industry is being developed by the Italians.
21. —	Ixtle de Maguey	} Mexico	Belongs to the <i>Agava</i> family, the fibre from the leaves is largely used to meet the local demand for ropes and twine in place of jute twists.
22. —	Ixtle de Lechuguika		
23. —	Ixtle de Palma		
24. LUPINUS ALBUS	} Lupin	Italy	Used in the production of coarse cloth. It was claimed by Italians that sacks and awnings prepared from this fibre were comparable to jute. Good results were reported to have been obtained by mixing Lupin with cotton and hemp. Experiments in water-proofing fabrics prepared from it are in progress.
25. LUPINUS LUTENS			
26. LUPINUS VARIUS			
27. LYGEUM SPARTUM	Esparto grass	Spain	Being used as a substitute for jute in manufacture of bags, coarse cloth and rope-soled shoes. The extent of this industry is not known.
28. MUSA SPECIES	Musa fibre	Ethiopia	Up to now used only for domestic purposes but it is understood two Italian factories were being erected to manufacture packing cloth and sacks from this fibre.

Scientific Name	Popular Name	Where grown and developed	Uses and other important features
29. NEOGLAZIOVIA VARIEGATA	Caroa or Crowa	Brazil	A serious competitor. It is understood that the Brazilian Government are sponsoring the cultivation of this fibre so that it may replace all imports of Sisal, henequin or jute. According to reports Caroa does not require either softening or carding before spinning and it is claimed that it is better than jute for cloth making.
30. NIPA FRUITICANS	Attap or Lalang grass	Medan (Sumatra)	Replacing jute cloth for protecting tobacco during cultivation and as a carrier.
31. PHORUM TENAX	Formio	Argentine	Being used in increasing quantities for twines and twists, ropes, sacks and alpargatas (i.e. rope-soled shoes customarily made from jute).
	New Zealand Hemp or New Zealand Flax Cananio in Spain	New Zealand, Chile, Natal, Spain, Isle of Man	Small quantities of coarse bags are produced by the natives from this fibre. The industry is still in an undeveloped state, but in Chile and Spain its possibilities are being investigated.
32. PISUM SATIVUM	Pita	Colombia	This fibre which resembles Sisal is being used in the manufacture of yarn, twine, cloth and bags.
33. SANSEIERERIA SPEC	Bowstring hemp	Italy	Being used in admixture with jute. The extent to which it is being utilized is not known.

Scientific Name	Popular Name	Where grown and developed	Uses and other important features
34. <i>SIDA RHOMBIFOLIA</i>		Italian East Africa	Considered to be a good substitute for jute but extent of production not known.
35. <i>SPARTIUM JUNCEUM</i>	Broom fibre	Italy	Reported to be used as substitute for jute.
36. <i>URENA LOBATA</i>	Cadillo (Cuba), Punga (Belgian Congo), Palo Palo, Paka or Pacca (Madagascar) Aramina (Italian E. Africa) Ban Ochra (India)	Cuba, Belgian Congo, Madagascar, India, Italian E. Africa	This fibre appears to be receiving considerable attention from Foreign Governments, particularly Cuba, Italy, Belgium where its possibilities are being used in admixture with other fibres for cloth production.
37. <i>URTICA CHOICA</i>	Nettle	Germany	Used in the production of cloth suitable for making containers, but so far no report of any large scale development.
38. —	Macambira	Brazil	Experiments have demonstrated that when mixed with caroa this fibre can be used successfully for making bags, canvas and other fabrics generally produced from jute.
39. —	Venezuelan fibre	Venezuela	The exact nature of the fibre is not known but it is reported that coffee and cocoa bagging of good quality has been made from yarn prepared from a mixture of jute and Venezuelan fibre.
40. —	Raffia	Madagascar	Bags and other textile articles are manufactured from raffia but extensive development has not so far been reported.

(b) ARTIFICIAL FIBRES

Popular Name	Where grown and developed	Use and other important features
Canapafiocco (artificial hemp fibre)	Italy	Reported to be mixed with raw jute in the form of tow and blended with jute yarn in the manufacture of cloth.
Sniafiacco	Italy	A type of coarse artificial silk made into small bags for retail distribution of flour, grain, macaroni and chemical products, thereby reducing the number of jute bags used for these purposes.
Staple fibre	Germany	Produced from dried potato tops and wood cellulose is being used in increasing quantities for cloth production.
Straw fibres (zell jute)	Germany	A serious substitute. Artificially produced from straw, the German Government in 1938 passed a decree whereby all jute manufacturers had to include quantities of this fibre along with hemp and flax in their products.
Artificial wood fibre	Germany	Prepared by chemical treatment from certain types of wood bark ; it can be spun into a coarse but strong yarn, suitable for twine and cordage.
Willow bark	Germany	Fibre having good spinning properties is being extracted by chemical treatment from willow bark. It is reported that it mixes with flax, cotton, wool or jute and the fabrics produced from it are harder wearing than jute.

APPENDIX J.

**CALCUTTA BALED JUTE ASSOCIATION**

**HOME GUARANTEE FORM.**

(as provided for in Clause 9(c) and 16 of the Association's Contract Form)

*Calcutta*,.....19 .

*Messrs.* .....

Gentlemen,

With reference to Messrs. Contract No.....  
of ..... for ..... bales, subject to the conditions endorsed  
hereon, we hereby guarantee:—

- (a) To pay you all allowance including charges and/or penalty, if any, which may be awarded in arbitration, in respect of the above mark and description, as delivered or discharged at destination on the ground of quality and/or condition.
- (b) To accept the award or awards of arbitrators purporting to be made at the port of London in respect of such jute as evidence of the qualification and authority of the arbitrators, of the identity of the jute arbitrated on, and of the quality and/or condition of the jute on the delivery and discharge thereof at destination.

And we declare that signature of the arbitrators on any award in London shall for the purposes hereof be deemed to be sufficiently proved by the production of the award purporting to be signed by them.

- (c) To be bound by such award or awards as conclusive of our liability to you to pay allowances under our guarantee hereby given.
- (d) To indemnify you against loss incurred by you by reason of shortage in weight at port of destination and to be bound by certificates of outturn at port of destination.

And it is hereby expressly agreed that our liability for the quality and/or condition shall be limited to payment of allowances including charges and/or penalty, if any, and that under no circumstances shall you be entitled to invoice back the jute or to insist on our taking same back and that no provision in any award for invoicing back or rejection of the jute shall be binding on us.

This guarantee shall be incorporated in and form part of our contract with you above mentioned.

Yours faithfully,

(Balers.)



*Conditions to be implied in the Letter of Home Guarantee.*

1. All allowances for quality and/or condition shall be calculated on the basis that each bale weighs 400 lbs.

2. Any claim from home on account of quality and/or condition shall be notified to sellers within twenty-three days from the final date of discharge of the steamer at port of destination.

3. The result of the arbitration award shall be notified to sellers by the buyers immediately on receipt of telegraphic advice from home. If such information be not notified to the sellers in sufficient time to enable them to lodge an appeal, such award shall not be binding on the sellers,

4. If a parcel guaranteed at port of destination for quality and/or condition be passed by arbitration in Calcutta, then sellers' liability on such parcel shall cease and the letter of guarantee will be considered as cancelled.

5. Any sterling claims for quality and/or condition to be converted into rupees at the Bank's selling rate for demand Drafts ruling on the 10th day after the date of award ; and such rupee bills for allowance to be paid within seven days of presentation of your Bill to us. Bill to carry interest at Bank rate from date of presentation until date of payment.

6. (a) In the case of a parcel guaranteed for weight at port of destination, buyers may deduct short weight as per Licensed Measurers' certificate at time of shipment, and shall furnish weight certificates within twelve months from the date of shipment.

On receipt of these certificates, sellers shall pay to buyers for any short weight or receive payment for any excess weight calculated on the sterling price according to buyers' debit or credit notes from their home agents:—

(b) When buyers have received a weight guarantee and do not wish to avail themselves of same, they shall deduct short weight as per Licensed Measurers' certificate at time of shipment and shall also release sellers from their weight guarantee, notifying sellers to this effect within 15 days of the date of the Bill of Lading.

7. If buyers fail to present weight certificates within twelve months from the date of shipment, they shall pay on demand to sellers excess weight at the rate of 5 lbs. per bale, calculated on the contract price.

8. In cases where the buyers' claims have been settled amicably without proceeding to arbitration, sellers will pay such claims in terms

of this guarantee letter, and, in all cases where sellers have made an offer or offers for amicable settlement (whether such offer or offers are accepted or not) *sellers shall pay to buyers the actual telegraphic and other expenses up to a sum not exceeding rupees five on such parcel on which the baler has made an offer for amicable settlement.*

Buyers will, on demand from sellers, produce debit notes from their home agents, in confirmation of the amicable settlement.

In cases of arbitration balers will pay the actual cable charges up to a sum not exceeding Rs. 5 but if the goods are passed in arbitration balers will not pay any such charges.

\*Such liabilities to be limited to a sterling price not exceeding by £1 per ton the C. I. F. value based on the rupee price of the contract ; viz:—rupee price, plus export duty and charges, insurance, freight, commissions, etc.

## APPENDIX K.

(*Indian Central Jute Committee Bulletin, July 1940*)

### JUTE & FABRICS

#### Fixation of Minimum Prices

##### *Decision of Indian Jute Mills Association*

An Associated Press message of June 27 (1940) states that the Committee of the Indian Jute Mills Association held a special meeting to discuss the present market position and to devise methods by which they could best assist the market. After consultations with the Government of Bengal, the Committee have decided strongly and unanimously to recommend to members that they should purchase raw jute at their usual rate of buying but at prices which will not be below the following per maund:—

			Rs.	As.	P.
Indian	District	Middles	8	0	0
		Bottoms	7	0	0
Indian	Jat	Middles	8	8	0
		Bottoms	7	8	0
European	Packed	Middles	9	0	0
		Bottoms	8	0	0

The Committee also unanimously recommended that standard fabrics should not be sold at prices below:—

40" 8 oz. cloth Rs. 12-0-0 per 100 yds.

40" 10 oz. cloth and 40" 10½ oz. cloth Rs. 15-8-0 per 100 yds., this to be regarded as the basis.

Heavy Ceers and B. Twills Rs. 32-0-0 per 100 bags.

As regards fabrics other than standard, members have been requested not to sell these at prices below such as may be determined in strict relation to the above mentioned prices, for standard goods.

This position will obtain up the end of December of this year when the Committee have undertaken to place further proposals before Government designed to meet the situation as it then exists, although it may be necessary in the interim to consult with Government regarding these prices should circumstances necessitate.

Taking into consideration the stock of figures of the mills for 40" inches 8 oz. cloth the Committee unanimously recommended that until further notice, members should make no sales of this cloth either with or without guaranteed shipments. Further, the Committee are at one in appealing to members to afford all possible facilities to their bazar buyers in the present difficult position by such action as buying back-grounds or by the interchange of one fabric for another or by such other means as mills might by arrangement with their buyers, consider best in the circumstances.

## APPENDIX L.

(*Indian Central Jute Committee Bulletin, Dec. 1940*)

### DELHI CONFERENCE ON JUTE PROBLEMS

*Held on the 4th and 5th December, 1940*

The results of the Delhi Conference were as below:—

1. The mills will do their utmost to purchase jute according to the following programme:

15	lacs of bales by	January 15,
25	" "	February 15,
32.5	" "	March 15, and
37.5	" "	April 15, 1941.

2. This will be exclusive of any jute of quality lower than Bottoms other than cuttings. Jute thus excluded will be subject to no price agreement.

3. The basic minimum prices for loose jute in rupees per maund will be as follows:—

	Middles	Bottoms
European packed	8/8	6/12
Indian Jat	8/4	6/8
Indian District	7/12	6/-

Unassorted Daisee in Drums Rs. 6-0-0 per maund.

4. If in any of the four periods referred to in the above buying programme the mills are unable to purchase the full amount stipulated, and if prices have not risen by any more than 4 as. per maund above the agreed minimum prices the Association will arrange to purchase jute up to the stipulated totals on behalf of the Government on the following terms:—

- (i) The Association will act as agents for all Government purchase, ensuing that qualities are according to standard and such as can be utilised in mills' manufactures and therefore marketable.
- (ii) The Association will arrange for the mills to give storage facilities for the jute, for a period which will not exceed 18 months except by mutual agreement.
- (iii) Mills which give storage facilities will get a godown rent of 1 anna per maund per annum.
- (iv) The Government will be responsible for insurance against all risks, to the extent that they may wish to have this effected, and will take all responsibility for deterioration, wastage, loss of weight and risk of failure to recover under-seller's guarantees for defects.

(v) The Government will be responsible for actual inward and outward handling charges except in respect of jute sold to a mill in which it is stored on their behalf.

(vi) The mills make no buying charges.

5. The Government will be responsible for the financing of purchases effected on their behalf subject to any arrangement that may be made on a voluntary footing with mills under which they will participate in such financing or relieve Government of it altogether. The members, it is understood, will give their further consideration to the question of details regarding purchases on Government account should this become necessary.