

REPORT
ON THE
AIR-BORNE TRADE

OF THE
BOMBAY PRESIDENCY
(EXCLUSIVE OF SIND)



OFFICIAL YEAR 1921-1922

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TABLE OF CONTENTS.

	PAGES.
1. Forwarding letter and Review of the Trade for the year	i—vii
2. Explanatory Note	1-2
3. Statement II (a) showing the Imports by rail into the Bombay Presidency ..	3—19
4. Statement II (b) showing the Exports by rail from the Bombay Presidency ..	20—36
5. Statement III showing the Local Trade by rail between the different blocks of the Bombay Presidency	37—52
6. Appendix A showing the Value Rates of the different articles	53—55

From

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To

THE SECRETARY TO GOVERNMENT,
Revenue Department, Bombay.

Poona, 23rd April 1923.

Sir,

I have the honour to submit the Annual Returns of the Railborne Traffic of the Bombay Presidency (exclusive of Sind) for the year ending 31st March 1922.

2. The Registration of the Railborne Trade was, as usual, carried out by the Government Examiner of Accounts, B. B. & C. I. Railway, Bombay, and its review and publication by this Department.

3. *Railway Extensions*.—During the year under report there have been two additions to open mileage of railway in the Presidency aggregating 34·37 miles. A new line was opened from Botad to Tagdi extending to 22·75 miles on the Bhavnagar State Railway. Another was a small addition of 11·62 miles on the Chhoranda Korsol section in the Baroda State.

4. *Season*.—The indifferent and even capricious character of the *rabi* rains of 1920 was reflected in the partial to almost total failure of the *rabi* crops throughout the Presidency, except in the favoured tracts in the vicinity of the Sahyadris, where the crops managed to maintain themselves on the strength of the previous moisture, and in the areas commanded by irrigation. The gloomy outlook was not relieved till the start of the monsoon in July 1921 when copious and well-distributed rainfall gave a good impetus to all agricultural operations and brightened the situation. Even after this, however, an anxious period prevailed for two months, for, while continuous rain hampered agricultural operations in many places in Gujarat, a spell of dry weather caused considerable anxiety in the East Deccan and Karnatak and it was only in the Konkan that the Kharif rains could be said to be upto the requirements. Some useful showers occurred in places in the Deccan and Karnatak in the first half of October but the relief they gave was neither general nor substantial. As may be expected the out-turn of crops attained the normal level only in the Konkan and in portions adjoining the Western Ghats and fell below it everywhere else. After the poor *rabi* season of the previous year, however, which had left the Presidency with a deficient supply of food, fodder and water, this out-turn, subnormal though it was, was very useful in ameliorating the agricultural condition of the Presidency in general.

5. *Prices*.—The subjoined table exhibits the variations in prices of the principal articles of trade as obtained in the Bombay market. It will be seen therefrom that the prices of all the articles showed a drop below those of the previous year except food grains and cotton seed.

Prices.

Articles.	Percentage rise (+) or fall (—) as compared with last year's prices.	Articles.	Percentage rise (+) or fall (—) as compared with last year's prices.
Cotton, raw	— 3·94	Linseed	— 20·67
European { Cotton, twist and yarn ..	— 33·24	Rapeseed	— 7·37
{ Piece-goods—all sorts ..	— 20·52	Sesame	— 23·69
Indian { Cotton, twist and yarn ..	— 16·45	Castor seed	— 8·69
{ Piece-goods—all sorts ..	— 9·13	Cotton seed	+ 15·16
Sugar	— 49·64	Wool, raw	— 33·84
Wheat	+ 19·68	Copper	— 14·86
Rice without husk	+ 4·32	Iron and Steel	— 33·34
Jowar and Bajra	+ 22·12	Kerosene
Gram and Pulse	+ 19·29		

The chief causes which tended to effect a rise or fall in the prices of the several articles are noted below :—

Food-grains.—As already remarked in paragraph 4 above the season of 1920-21 was in no way satisfactory and the ill-effects of the poor monsoon of the year still made themselves felt and were not counteracted to any appreciable extent by the conditions arising from the fairly good monsoon of the year under report. The situation was further aggravated by shortage of the Northern India Wheat crop and these two factors combined, mainly tended to keep the prices of food grains generally at a high level.

Oil-seeds.—Owing to the general unfavourable conditions and the limited purchasing power of the principal European markets, the demand for these abroad fell far short of anticipations. The depression in the British oil-seed crushing industry, the bumper crop in Argentine and the increased demand for West African palm-kernels, also contributed to the decrease in demand for the Indian article. And this limited demand was the main cause of keeping down the prices of all oil-seeds except cotton seed which had in fact a better demand than in the previous year.

Cotton Manufactures.—The prices of both the European and Indian sorts showed a downward tendency. The decrease in the price of the former is mainly attributable to overstocking of goods during the previous year and a falling off in its demand on account of the campaign in favour of Indian-made piecegoods reinforced by further development in favour of the wearing of homewoven goods made from Indian handspun yarn. Owing to the absence of serious labour trouble such as a general strike of operatives, ample supply of textile machinery from abroad and drastic reduction in the price of English coal, the Indian mills were able to keep on working steadily, without any hitch and the out-turn thus out-reaching the local demand tended to bring down the prices of the Indian Cotton manufactures.

Sugar.—The cessation of control on Mauritius sugar combined with the bumper crop of that place, greater imports from Java, heavy stocks in America and the over-stimulated production in Cuba, which, not only flooded its normal markets but found its way into markets further afield, account, when taken together, for the striking fall in the price of the article.

Metals.—Accumulation of considerable quantity of war scrap available for remanufacture, automatic falling off in prices owing to depreciation of the German mark and better output of Central Europe were reasons mainly responsible for reducing the prices of copper and iron and steel.

Wool-raw.—Poor demand from the United Kingdom which absorbs almost the whole of India's exports of Wool chiefly for the carpet trade, resulted in the reduction of the price of the article.

Of the remaining two articles the price of kerosine oil remained stationery while that of raw cotton showed only a negligible decline.

TOTAL TRADE.

(L. M. = Lakhs of Maunds ; 00,000 omitted.)

6. The following statement summarises the external and local trade of the Bombay Presidency for the year under review, and includes the corresponding figures of the previous year and the average for the quinquennium ending 1920-21 :—

Total Trade.

Description of Trade.	Quantity in Lakhs of Maunds.			Valuation in Lakhs of Rupees.		
	*Average.	1920-21.	1921-22.	*Average.	1920-21.	1921-22.
1	2	3	4	5	6	7
Imports from External Blocks	1,451	1,258	986	8,440	7,426	7,845
Exports to External Blocks	279	328	314	5,767	8,307	8,008
Total	1,730	1,586	1,300	14,207	15,733	15,848
Internal or Local Trade	589	628	784	6,402	8,304	8,119
Grand Total	2,319	2,214	2,084	20,609	24,127	23,967

*The average is for the five years ending 1919-20.

The aggregate traffic carried by rail declined by 130 L. M. or by 5·9 per cent., in volume and by 160 lakhs of rupees or by 0·6 per cent. in value below the previous year. As compared with the average it also showed a marked decrease of 235 L. M. or of 10·1 per cent., but an appreciable increase of 33·6 crores of rupees or 16·3 per cent. in value. The decline is mainly in imports from outside provinces which formed about 47·3 per cent. of the total traffic. These are mainly for export abroad but are also partly used in the Presidency. The exports from the Presidency showed a set back of 14 L. M. below the previous year though when compared with the average it exhibited a substantial expansion of 35 L. M. The local transactions advanced by 156 L. M. and by 195 L. M. over the previous year and the average respectively.

IMPORTS.

7. Of the total imports of the year 47·3 represented the receipts into Bombay Port. Of the rest Gujarat and Deccan took up slightly over 20 per cent. each and the remaining was distributed among other blocks of the Presidency. The principal transactions of the year are noted below and compared with the previous year and the average.

Imports.

No.	Articles.	Quantity in thousands of maunds.						Valuation in thousands of rupees.		
		Bombay Port.			Presidency (excluding Bombay Port).			Bombay Presidency.		
		*Average.	1920-21.	1921-22.	*Average.	1920-21.	1921-22.	*Average.	1920-21.	1921-22.
1	2	3	4	5	6	7	8	9	10	
1	Coal and Coke ..	40,539	24,225	8,337	32,155	36,481	20,719	39,020	47,805	20,248
2	Cotton, raw ..	7,037	7,861	10,325	650	835	672	2,94,884	2,61,285	3,62,285
3	Dyes and Tans ..	461	283	273	90	67	60	7,608	3,162	3,666
4	Wheat and wheat flour.	6,806	3,734	2,417	2,032	2,655	1,691	47,989	35,498	31,472
5	Other food grains ..	8,861	5,534	4,682	8,734	6,345	7,000	90,023	81,941	86,073
6	Hemp ..	266	92	43	19	12	10	2,621	935	665
7	Hides and Skins ..	349	113	148	46	32	41	17,770	6,300	9,021
8	Jute ..	813	268	91	135	193	120	10,435	8,799	4,183
9	Metals ..	7,433	10,371	5,894	288	1,031	681	32,749	30,424	14,214
10	Mineral substances ..	985	1,600	1,655	2,443	4,206	3,224	1,983	3,313	2,786
11	Oils ..	226	287	317	334	458	360	10,548	15,432	12,051
12	Oilseeds ..	8,773	7,146	7,438	1,032	958	1,082	58,506	55,828	57,227
13	Opium ..	5	1	..	1	1	1	3,221	668	792
14	Provisions ..	874	430	271	799	874	584	41,133	47,763	33,157
15	Railway Plant and Rolling Stock.	1,738	179	150	927	1,031	1,004	25,737	15,674	12,528
16	Spices ..	358	314	340	164	185	205	12,888	10,903	12,252
17	Sugar ..	380	153	79	1,264	1,470	1,267	17,709	25,583	17,104
18	Tobacco ..	35	21	9	58	68	66	2,274	2,351	1,855
19	Wool, raw ..	200	55	134	4	1	2	11,312	3,454	8,414
20	Others ..	4,556	3,410	4,052	2,689	2,833	3,185	95,684	85,445	94,053
	Total ..	91,345	66,077	46,655	53,844	59,726	51,073	8,30,184	7,42,572	7,84,544

*The average is for the five years ending 1910-20.

Coal and Coke.—The trade in this article showed a considerable falling off, the amount being only 60 per cent. of the last year and half of the quinquennial average. The decrease was mainly due to the fact that foreign coal was imported in considerably larger quantities as the Indian market was hampered by shortage of waggons and the consequent difficulty of transport, while at the same time the imports of foreign coal were further encouraged by cheap freights, favourable shipping opportunities and unrestricted import. Almost the whole portion of the Indian article was as usual received from Bengal, Bihar and the Central Provinces.

Cotton Raw.—The receipts of this article into Bombay Port, which claimed 94 per cent. of the total, rose by 23 L. M. over last year owing to greater receipts from

the United Provinces, the Punjab, the Central Provinces and the Nizam's Territory. The supplies from Madras and Mysore on the other hand were much restricted.

Food-grains.—The transactions in food-grains including wheat and wheat flour were 8·1 per cent. and 36·7 per cent. respectively below the previous year and the average of the preceding five years. The fall is mainly attributable to the shorter receipts of wheat from Central Provinces, Punjab and Rajputana and of wheat flour from the last two places. The imports of gram and pulse also receded. Imports of jowar and bajra however showed some expansion as takings from other provinces were necessary to supplement the meagre local supply.

Metals.—These showed an enormous decrease of 48·3 L. M. below the dealings of the previous year and of 11·4 L. M. below those of the average. The bulk of the receipts as usual consisted of metallic ores (59·9 L. M.) for export abroad, the supplies of which were derived almost wholly from the Central Provinces.

Among metals proper the imports into Bombay Port of iron and steel unwrought and wrought including machinery, mill-work and other manufactures showed a considerable set back in all descriptions of trade partly due to larger receipts of foreign articles. The imports of copper unwrought and manufactured into Bombay Port, fell, to less than half of the quantity taken during the last year. The imports of brass also showed a similar decline.

Oil-seeds.—The trade in oil-seeds, the bulk of which consists of receipts from other provinces into Bombay Port for export abroad and which had received a sudden check during the war and sometime after, showed a slight improvement of 2·9 L. M. when compared with the previous year but it still fell far short of the quinquennial average (13·3 L. M.). The receipts of cotton seed into Bombay Port rose from 30·4 L. M. to 33·9 L. M. probably due to better freight facilities and greater demand from abroad. The imports in sesame showed a very appreciable expansion due to greater consignments from the United Provinces, the Central Provinces, Central India, and the Nizam's Territory. The receipts of poppy also showed a slight improvement. Rape and mustard, linseed and groundnut, on the other hand exhibited a considerable set back. Reduced supplies from the United Provinces were responsible for the shrinkage in the receipt of the first, *viz.*, rape and mustard. The decreases under linseed is attributable to smaller receipts from Bihar, the United Provinces and Central India, while restricted supplies from Madras almost wholly contributed to the considerable falling off under groundnut.

Among other articles, the most marked increase was apparent in the larger receipts of hay, straw and grass (+3·8 L. M.) from Madras, United Provinces, Central Provinces and Central India, whence they were imported into the Presidency to strengthen the supply available here, which was naturally poor due to the indifferent character of the season during the year under report. Spices also showed a general improvement over the last year, chillies being responsible for the greatest share in the increase. These were received in larger quantities than during the last year mainly from Madras, Central India and the United Provinces. The only other article under this head which showed an appreciable extension was cardamom, the imports of which from Madras were nearly doubled. Better supplies of castor-oil from the United Provinces and the Nizam's Territory, of cocoanut oil from Madras and its seaports, and of kerosene oil from Bengal, Madras and Mysore effected an appreciable expansion under the trade in oils. There were extended transactions in skins of sheep owing to the increased consignments from Madras, United Provinces and Central Provinces. In chemicals, Madras contributed a substantial share of increase though this was partly counterbalanced by a noticeable decline in the supplies from Bihar and Orissa. The transactions in raw wool more than doubled, larger supplies from Rajputana mostly contributing to the increase.

Of the articles which showed a decline the most striking shrinkage was under Sugar. The major portion of the decrease under this head was attributable to restricted consignments of Gul mainly from the United Provinces, the Punjab and Central Provinces, of sugar unrefined from Calcutta and Rajputana, and of sugar crystallised from the United Provinces, Central Provinces and Calcutta. Poor supplies of gunny bags and tea from Bengal, of dried fruits and nuts from Madras and of bones, oil cakes, bran and crushed food from the United Provinces and Central Provinces account for the decline under the dealings of these articles.

▼

EXPORTS.

8. The total quantity of exports fell from 328 to 314 L.M. or by 4·3 per cent. below the previous year and the value from 831 to 800 thousands of rupees. Bombay Port contributed more than 57 per cent. to the total exports.

No.	Articles.	Quantity in thousands of maunds.						Valuation in thousands of rupees.		
		Bombay Port.			Presidency (excluding Bombay Port).			Bombay Presidency.		
		*Average.	1920-21.	1921-22.	*Average.	1920-21.	1921-22.	*Average.	1920-21.	1921-22.
1	Coal and Coke ..	47	33	1,142	165	190	216	229	255	1,962
2	Cotton, raw ..	250	311	245	157	173	148	16,267	24,882	14,217
3	Cotton manufactures—European ..	1,647	244	158	12	4	2	116,722	20,888	15,958
4	Cotton Manufactures—Indian ..	734	1,908	2,252	1,366	1,329	1,489	191,937	417,369	423,615
5	Wheat and Wheat flour ..	407	364	855	451	619	556	6,259	8,036	13,387
6	Other foodgrains ..	851	3,610	2,637	961	1,966	587	10,480	41,376	27,183
7	Hides and skins ..	78	37	27	95	82	89	8,691	6,119	6,319
8	Gunny bag and cloth ..	201	94	132	78	70	89	7,206	3,657	4,739
9	Liquors ..	33	70	57	1	1	1	2,356	5,170	5,028
10	Metals ..	1,495	2,827	3,102	184	172	247	31,090	68,232	59,748
11	Kerosene ..	1,433	1,343	1,557	70	131	181	10,395	11,602	14,003
12	Oilseeds ..	202	106	227	1,296	1,332	1,160	6,897	7,216	10,119
13	Dried fruits and nuts ..	721	624	566	139	100	112	28,969	40,268	40,616
14	Railway Plant & rolling stock ..	659	783	981	451	513	417	6,553	7,190	8,363
15	Salt ..	390	372	273	6,332	6,067	5,336	18,724	16,623	14,535
16	Spices ..	399	432	394	162	168	177	9,404	10,828	10,690
17	Sugar ..	721	280	632	464	311	349	14,997	14,454	16,601
18	Tobacco unmanufactured ..	1	1	3	311	354	383	6,674	13,883	14,068
19	Others ..	2,758	3,119	2,700	2,122	2,689	1,944	88,185	112,649	99,186
	Total ..	13,027	16,558	17,935	14,817	16,271	13,483	582,125	830,697	800,337

*The average is for the five years ending 1919-20.

Coal and Coke.—The most noticeable feature in the Export Trade was the very substantial advance exhibited by this article over the previous year and the average. As already stated under the “imports” of this article, difficulty of securing the Indian Coal and favourable prices of the foreign article induced larger imports from abroad. The United Provinces, Central India, and the Nizam’s Territory took up the major share of the article.

Food grains.—Under this head the most noticeable increase occurred under wheat and wheat flour which came in larger quantities into the Bombay Port from foreign countries. Existing conditions tended to encourage the importations of these articles from abroad. Prices were favourable in Australia, cheap freight was offering freely, high prices, due mainly to a genuine shortage in India consequent upon the partial failure of the Northern India wheat crop, were ruling in this country. All these factors contributed to induce larger imports from foreign countries which were then sent out from Bombay Port to different blocks of the Presidency and India.

Cotton manufactures.—Of these the dealings in the European article considerably receded, as owing to the “Khadi” movement there was a large demand for the coarser kind of Indian cloth and a corresponding falling off in the demand for the article from abroad. As may be expected the Indian piece-goods naturally took a larger share in the export trade which increased by about 20 per cent. over the last year and was nearly double the average.

Sugar.—Bombay Port sent out appreciably larger consignments due to very heavy importations from Mauritius and Java. During the previous year supplies of Mauritius sugar were controlled by the Royal Commission but this control ceased from February 1921, and with its cessation Mauritius sugar began to arrive in larger quantities. Besides this, the condition of the local market at the commencement of this year was favourable to large imports. Supplies from Java had been short in the previous year and local stocks were, in consequence, poor. A market thus sadly depleted was naturally prepared to take full advantage of the bumper crop in Mauritius and Cuba and the favourable prices and conditions prevailing in the sugar import trade.

Metals.—The movements of metals including machinery and mill work made a striking advance. Of this increase cotton spinning and weaving machinery

shared a considerable portion, as a large demand, necessitated by the increased production of both yarn and cloth in the Indian Mills, existed for it. The fact that the factories in the United Kingdom were reviving and working again under more or less normal conditions and could thus keep pace with the increased demand and could meet outstanding orders also accounts for a substantial portion of the general increase under the item.

Among other articles kerosine oil showed some improvement due to larger receipts from foreign countries especially from the United States and British Borneo. The other item worth notice was railway plant and rolling stock, heavy consignments of which were despatched from Bombay Port to the United Provinces, Central Provinces, Central India and the Nizam's Territory. The trade in salt exhibited some decline when compared with the previous year and the average. This was mainly due to smaller consignments to the United Provinces and the Nizam's Territory, mostly from Gujarat and Kathiawar. Hides and skins, liquor, dried fruits and nuts and spices showed a set back but it was only slight and deserves no detailed mention.

6. LOCAL TRADE.

9. This branch of trade consists mainly of transactions between the Bombay Port and the rest of the Presidency which formed about 79 per cent. of the total traffic. The remaining 21 per cent. represented the interchange of commodities between the different blocks of the rest of the Presidency.

No.	Articles.	Quantity in thousands of maunds.			Valuation in thousands of rupees.		
		*Average.	1920-21.	1921-22.	*Average.	1920-21.	1921-22.
1	Coal and coke ..	1,849	3,525	14,491	1,955	4,223	20,685
2	Cotton, raw ..	4,401	4,763	4,201	176,716	244,608	154,791
3	Cotton manufactured (European) ..	355	64	70	25,584	7,462	8,484
4	Cotton manufactured (Indian) ..	571	648	859	54,176	77,360	88,825
5	Dyes and tans ..	940	905	668	6,863	7,243	7,638
6	Wheat and wheat flour ..	1,623	958	959	11,579	8,054	9,118
7	Other food-grains ..	8,331	10,046	10,021	56,300	80,601	85,247
8	Hemp ..	65	38	23	549	335	200
9	Hides and skins ..	191	88	118	8,790	3,969	5,803
10	Gunny bags and cloths ..	379	290	359	9,828	6,460	7,617
11	Liquors ..	84	97	109	3,992	6,662	8,205
12	Metals ..	2,465	4,648	3,913	26,504	55,569	56,838
13	Mineral substances ..	3,998	2,986	3,528	2,278	1,752	2,052
14	Oils ..	2,142	2,089	2,635	20,261	21,117	25,713
15	Oilseeds ..	3,430	1,959	3,293	19,121	13,274	27,010
16	Provisions ..	1,130	1,122	961	35,632	47,630	42,390
17	Railway Plant and Rolling Stock ..	1,586	1,476	2,858	8,644	8,547	15,571
18	Salt ..	1,597	1,199	1,266	4,495	3,091	3,268
19	Spices ..	514	457	493	7,441	7,266	8,426
20	Sugar ..	2,719	1,878	2,649	33,758	44,846	45,371
21	Tobacco ..	278	309	227	5,874	11,737	8,103
22	Others ..	20,304	23,219	24,797	144,064	177,626	180,591
	Total ..	58,952	62,764	78,498	664,404	839,432	811,946

* The average is for the five years ending 1919-20.

The statement shows the principal fluctuations. Generally it may be remarked that except cotton raw, dyes and tans, metals, provisions and tobacco which show some decline, the trade movements in this branch show on the whole a considerable improvement.

I have the honour to be,

Sir,

Your most obedient servant,

HAROLD H. MANN,

Director of Agriculture.