



REPORT OF THE SECOND SILK-RAYON DELEGATION

ADEN
ETHIOPIA
ZANZIBAR
BRITISH EAST AFRICA
MAURITIUS
IRAQ
IRAN
LEBANON
SUDAN



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: Mr. Ganeshnarayan Podar (Leader)

Middle (L to R) : Mr. Vrajlal Radia, Mr. Haridas Motilal Parikh,
Mr. Vadilal C. Gandhi.

Bottom : Mr. Chinubhai Kalidas Patel.

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THE SILK & RAYON TEXTILES EXPORT PROMOTION COUNCIL,
Resham Bhavan, 78 Veer Nariman Road,
BOMBAY-1

P R E F A C E

The Second Council-sponsored Delegation visited some of the West Asian and African markets during April-May 1960 and submitted its Report to the Committee of Administration on its return.

The Report embodies useful information about the markets visited. The recommendations made by the Delegation should help the Industry and Trade to develop a pattern of export business in accordance with requirements of these countries. The Report, as submitted, is being published in its entirety. The Committee feels that the views as stated by the overseas buyers are exaggerated, and therefore, it is not in full agreement with these.

The detailed study made by the Leader of the Delegation and the other Delegates is appreciated.

D. N. SHROFF
Chairman

CONTENTS

PART I

	Page
Introduction	1
Iran	37
Iraq	49

PART II

Lebanon	63
Sudan	69
British East Africa	79
Zanzibar	97
Mauritius	109
Ethiopia	119

PART III

Appendix "I" : Itinerary of the Delegation	127
Appendix "1A" : Particulars about Bookings and Enquiries	134
Appendix "2" : Table Showing country-wise imports by respective countries	136
Appendix "3" : List of Importers & Commission Agents in Teheran	138
Appendix "4A" : Exports of Art Silks and Rayons from Japan to Iran	141
Appendix "4B" : Exports of Art Silks and Rayons from West Germany to Iran	142
Appendix "4C" : Exports of Art Silks and Rayons from Italy to Iran	143
Appendix "5A" : Indian exports to Iran in 1958	144
Appendix "5B" : Indian exports to Iran in 1959	145
Appendix "5C" : Japanese exports to Iran in 1959	146
Appendix "6" : List of Silk & Rayon Textiles Importers etc., in Baghdad	148

	Page
Appendix "7A" : Value of Artificial Textiles imported into Iraq, countrywise from 1955-59	152
Appendix "7B" : Indian exports to Iraq in 1958	153
Appendix "7C" : Indian exports to Iraq in 1959	154
Appendix "7D" : Japanese exports to Iraq in 1959	155
Appendix "8" : Rates of Customs Duties on Art Silk Textiles levied in Iraq	156
Appendix "9" : Names and Addresses of Merchants and Importers in Beirut	157
Appendix "10" : Man Clothing in Artificial Silk Subject to Special Duty (Beirut)	159
Appendix "11A" : Indian Exports to Lebanon in 1958	160
Appendix "11B" : Indian Exports to Lebanon in 1959	161
Appendix "11C" : Japanese Exports to Lebanon in 1959	162
Appendix "12" : List of Silk & Rayon Textile Dealers, Commission Agents in Sudan	163
Appendix "13A" : Country-wise imports of Art Silk Fabrics into Sudan during 1956, 1957, 1958	165
Appendix "13B" : Imports into Sudan during first eleven months of 1958-59	167
Appendix "13C" : Imports into Sudan	168
Appendix "14A" : Indian Exports to Sudan in 1958	169
Appendix "14B" : Indian Exports to Sudan in 1959	170
Appendix "15" : Import Duties in Sudan	171
Appendix "16" : Exports of Selected Items for 11 months of the Year 1958 and 1959 from Sudan	172
Appendix "17" : Rate of Freight by Rail and Motor Trucks in East Africa	173
Appendix "18A" : Silk & Rayon Textile Importers and Manufacturers' Representatives in Nairobi	174

	Page
Appendix "18B" : List of Merchants, Commission Agents and Retailers in Mombasa	176
Appendix "18C" : Names and Addresses of Importers and Merchants of Silk and Rayon Textiles in Dar-es-Salaam ..	180
Appendix "18D" : List of Textile Importers known to the Chamber in Kampala	182
Appendix "19A" : Imports of Silk and Rayon Fabrics into British East Africa during 1957, 1958 and 1959 (Kenya) ..	184
Appendix "19B" : Indian Exports to Kenya in 1958	185
Appendix "19C" : Indian Exports to Kenya in 1959	187
Appendix "19D" : Japanese Exports to Kenya in 1959	189
Appendix "19E" : Imports of Silk, Rayon Fabrics into B.E. Africa during 1957, 58 and 59 (Tanganyika)	191
Appendix "19F" : Indian Exports to Tanganyika in 1958	192
Appendix "19G" : Indian Exports to Tanganyika in 1959	193
Appendix "19H" : Japanese Exports to Tanganyika	194
Appendix "19I" : Imports of Silks & Rayons into B.E. Africa during 1957, 1958, 1959 (Uganda)	196
Appendix "19J" : Indian Exports to Uganda in 1958	197
Appendix "19K" : Indian Exports to Uganda in 1959	198
Appendix "19L" : Japanese Exports to Uganda in 1959	199
Appendix "19M" : Direct Imports into East Africa in 1959 (Synthetic Textiles)	200
Appendix "19N" : Direct Imports into British East Africa in 1959 (Silk Fabrics)	201
Appendix "20" : Rates of Customs Duties levied in East Africa ..	202
Appendix "21" : List of Importers, Merchants of Silk & Rayon Textiles in Zanzibar	203
Appendix "22A" : Indian Exports to Zanzibar during 1958	204
Appendix "22B" : Indian Exports to Zanzibar during 1959	206
Appendix "22C" : Japanese Exports to Zanzibar during 1959	208

	Page
Appendix "23" : Textile Imports into Zanzibar from Principal Textile countries during 1957, 1958, 1959	209
Appendix "24" : Domestic Exports from Zanzibar during 1957, 1958 and 1959	210
Appendix "25" : Importers of Art Silk Textiles and Commission Agents in Mauritius	211
Appendix "26A" : Imports into Mauritius during 1957-58 ..	213
Appendix "26B" : Indian Exports to Mauritius in 1958 ..	215
Appendix "26C" : Indian Exports to Mauritius in 1959 ..	217
Appendix "26D" : Japanese Exports to Mauritius in 1959 ..	218
Appendix "27" : Form of Invoice for goods exported to Mauritius	219
Appendix "28" : Importers of Silks and Rayons in Addis Ababa	232
Appendix "29A" : Country-wise Imports into Ethiopia during the period 1957-58	223
Appendix "29B" : Indian Exports to Ethiopia in 1958 ..	225
Appendix "29C" : Indian Exports to Ethiopia in 1959 ..	226
Appendix "29D" : Japanese Exports to Ethiopia in 1959 ..	227
Appendix "29E" : Imports into Ethiopia during 1957, 1958 and 1959	228
Appendix "30" : Rates of Customs Duty on Imports levied in Ethiopia	229
Appendix "31" : List of Importers in Aden	231
Appendix "32A" : Import Statement for the years 1955-59 (Aden)	233
Appendix "32B" : Imports of Silk Fabrics into Aden	234
Appendix "33A" : Indian Exports to Aden in 1958	236
Appendix "33B" : Indian Exports to Aden in 1959	239
Appendix "33C" : Japanese Exports to Aden in 1959	241

INTRODUCTION

The Silk and Rayon Textiles Export Promotion Council, in concurrence with the Ministry of Commerce and Industry, Government of India, sponsored a Five-Member Delegation to West Asian and British East African countries. The composition of the Delegation was as under :—

1. Shri Ganeshnarayan R. Podar (Leader of the Delegation) of Shree Shakti Mills Ltd.
2. Shri Vadilal C. Gandhi of Ashok Silk Mills.
3. Shri Haridas M. Parikh of Shree Laxmi Silk Mills.
4. Shri V. J. Radia of D. V. Industries.
5. Shri Chinubhai K. Patel of Jaifabs Rayon Industries Pvt. Ltd.

The Terms of Reference for the Delegation were as under:—

1. To study the general economic conditions.
2. To study the indigenous industry, if any, engaged in the production of silk, rayon and synthetic textiles and other manufactures.
3. To assess the requirements of the market and to find out ways and means to increase India's share in that.
4. To study the duties and other charges levied on silk and art silk manufactures — both standard and preferential — import regulations, procedure and documents required.
5. To study the consumer preference — samples with c.i.f. prices may be procured, if possible.
6. To study the Trade Agreements which the country may have entered into which might affect her off-take of Indian manufactures.
7. To explore possibilities of Trade Agreement between India and the country visited.
8. To assess the need of appointing Council's own Representative and if so, to find out a suitable person for the same.
9. To enter into provisional contracts wherever possible.

The Delegation left Bombay on 11th April and arrived back, after completion of its tour, on the 25th May 1960. To save time, the Dele-

gation bifurcated into two groups for visits to Kampala (capital of Uganda) and Zanzibar where the two groups of the Delegation spent 3 days and 2 days respectively. At the rest of the places, members of the Delegation moved together. The detailed itinerary of the Delegation was as per Appendix No. 1.

Places visited by the Delegation were:—

Teheran—Capital of Iran;

Baghdad—Capital of Iraq;

Beirut—Capital of Lebanon;

Khartoum & Omdurman—Capital and principal town respectively of Sudan;

Nairobi, Mombasa, Dar-es-Salaam, Kampala and

Zanzibar—Capitals and principal towns of British East African countries;

Port Louis and Curepipe—Capital and principal town respectively of Mauritius.

Addis Ababa—Capital of Ethiopia; and
Aden.

A questionnaire, which was prepared for the study of the Delegation, was sent in advance to the Indian Embassies. They kept ready the answers to the questionnaire and also many other valuable bits of information which helped the Delegation in understanding the problems and the peculiarities of each country. The Indian Government representatives in the countries visited rendered valuable assistance in fixing interviews with the ministers, local Government Officials, leading merchants, Chambers of Commerce and other important persons concerned.

At the meetings with the Chambers and leading merchants, it had made it a point to explain the growth of the Rayon Weaving Industry in India and its desire to export and the eagerness to solve difficulties that are faced by the overseas merchants and the role assigned to the Council.

The Delegation visited a large number of importers, wholesalers and retailers at their shops to assess their requirements individually. The Delegation also entertained the leading importers and the Government Officials at most of the important places visited.

The Delegation has prepared its report in three parts. The General Observations and Recommendations are contained in Part I. A factual study, with country-wise details has gone into in Part II. The itinerary, a list of provisional contracts entered into, (Appendix IA) and the statistics will be found in Part III. The prices of the varieties mentioned in our report are the prices prevailing at that date. The names of importers and other merchants as well as the statistics and connected details, have been obtained from different sources. These seem to be correct to the best of our knowledge but no responsibility for their correctness can be accepted by the Delegation.

We request the members of the Council to study the reports mainly from the following points of views:—

Today, to earn raw material, exports have become imperative. As such all steps, necessary to export in a way which would command better prices and ensure better distribution, require our attention. At present there are thousands of exporters in the industry. In such a highly competitive overseas market, we have to stand competition by coming up to the level of other foreign exporters. Japan is our main competitor and is exporting through established Export Houses. The industry, therefore, must devise ways and means to step up our exports and to build up a sound reputation.

We strongly feel that the Council should take every step to standardise at all levels of export. But no measure of standardisation can ever succeed, unless an exporter is made to feel that he will lose a certain measure of incentive, in case he fails to follow the standardised methods.

Besides many other recommendations which we have submitted, there are three basic measures to be undertaken by the Government and Industry to form the basis of standardisation.

Firstly, we have to gain the much needed confidence of the overseas buyer by standardising the quality of our product. For this, not only minimum standards and general inspection of fabrics is to be enforced rigorously, but the industry should also standardise the construction, with their Brands or Numbers or at least some of the varieties, which are in vogue largely in the overseas market. This would enable the Importer to buy these varieties with full confidence.

Secondly, our present methods of execution of Export contracts require re-orientation. The overseas buyer, today, is very sceptical about

the way goods are received by him. Deliveries are late, goods do not conform to samples, packing and markings on the cases are defective. Methods of export are equally important as they cause not only monetary loss, but also cause many other difficulties to the overseas buyer. This discourages him from undertaking the distribution of our goods. We have suggested a Standard Contract Form which should contain full instructions about all these methods of export and will form a part of the Contract. These methods of export, contained in the Standard Contract Form, should be made compulsory for the industry to follow. In the event of any dispute or non-compliance with the same, there should be some measures through the enforcement of which the exporters themselves would feel compelled to honour the terms of the contract.

Lastly, the Government must see that raw material, i.e., rayon yarn, which is indigenously manufactured and made available to the Rayon Weaving Industry, is really of a high grade. The Government should also see that the continuity of the supply of foreign yarn is also maintained to make it possible for the manufacturer to produce standard fabrics. A break in supplies of yarn forces the manufacturer to buy whatever quality is available in the market, which in turn affects the quality of the fabric. Today, licences for yarn against exports of fabrics are issued so late that the continuity of supply of foreign yarn is not maintained. Besides, to procure import licences for yarn, manufacturers have sometimes to make forced sales of fabrics in the overseas markets. The Delegation feels that the Government should realise the difficulties of the manufacturers and issue adequate advance licences in lieu of exports.

We are afraid that the visits of various Delegations to the overseas markets shall be futile unless the Government and the Council work together in enforcing the various standardisation measures suggested in the report.

Acknowledgement

The Delegation wishes to express its sincere thanks to the Governments of the countries visited by the Delegation for the courtesy extended to it and the valuable assistance rendered through their Officials. The Delegation also thanks the various Chambers of Commerce and the leading merchants of the overseas markets for their hospitality, co-operation, and for the assistance rendered in the study of the markets.

The Delegation is also grateful to the Indian Government representatives in those countries who helped us in fulfilling our mission.

Total Demand

A table showing, country-wise, the total imports of rayon fabrics into the various countries visited by the delegation appears as Appendix No. 2. The total imports of rayon fabrics into these countries may be estimated to be of the order of Rs. 25 crores per year. These imports can be classified under two categories—viz. (a) Staple Fibre fabrics (normally termed as Spun Rayon fabrics) and (b) Filament Rayon fabrics made of Viscose, Acetate or Bemberg Filament and Synthetic fabrics (mainly Nylons etc.) This demand is being met mostly by Japan. India is next to Japan in the exports to most of these countries.

Out of the total imports of Rs. 25 crores per year, according to our estimate the imports of Spun Rayon fabrics have been of the order of Rs. 15 crores, i.e. 60 per cent. Filament and Synthetic fabrics make up the remaining 40 per cent.

Spun Rayon Fabrics

Spun Rayon fabrics are very popular in all these countries for a variety of reasons. Firstly, Japan is the sole supplier of such fabrics and is able to supply them at very low prices. These fabrics are in fact, able to compete with cotton textiles, even after meeting a higher customs duty which is levied on them by the importing countries.

Secondly, these fabrics satisfy the taste of the consumers who prefer to buy the fabrics with bright finish and in attractive prints. Japan supplies Spun Rayon fabrics mostly in 4-5 varieties, such as:— (i) Muslin No. 9, the construction being 30s x 30s in 89 Reeds x 60 Picks in 36" width; (ii) Muslin No. 1 in the construction of 30s x 30s in 68 Reeds x 60 Picks in 36" width; (iii) Shirting No. 4 in 20s x 20s with certain variations in the construction; (iv) Serge in the construction of 2/40s x 2/40 in 74 Reeds x 64 Picks in 36" width; and Fujette, which are also popular. These varieties are supplied mainly in prints and very little in plain form.

Thirdly, these fabrics for all practical purposes look like cotton fabrics. The consumer is unable to differentiate between cotton fabrics and Spun Rayon fabrics and is tempted to buy the latter on account of their attractiveness and general superiority over cotton fabrics.

India does not as yet manufacture in large quantities, 100 per cent Spun Rayon fabrics of a quality which would appeal to the overseas buyer. India will have to start manufacturing these varieties with the

correct finish and in attractive prints, before she is able to capture a sizable share of the imports of Spun Rayon fabrics in these countries. Japan has been supplying Spun Rayon fabrics mostly in resin finish. By giving this finish, the fabrics become fuller and heavier without affecting the feel.

Filament & Synthetic Fabrics

Of the Filament fabrics, Viscose Crepes, Satins and Taffetas are being demanded in slightly different constructions from those that are being presently produced in India. The main qualities in vogue are Lady Hamilton Crepe, plain and printed, Satin No. 3600, No. 4000 and No. 8000.

Of the Acetate and Bemberg Filament, varieties such as Taffetas, Crepes, Satins, Voiles, etc. are popular. Japan has started giving Nylon finish to these fabrics. By this means the fabrics can be made to feel like Nylon. This places the fabrics within the reach of average consumer, who looks for the Nylon feel along with the low prices. In Synthetic fabrics, Glass Nylon which was very popular not so long ago is now fast disappearing and is being replaced by superior varieties like Nylon Crepe, Nylon Taffeta, Nylon Satin, Nylon Georgette, Plain 30/30 Nylons and Shear Sucker Nylon. These varieties and others (which have been dealt with separately in this report by countries) should now be manufactured by India to develop their exports in appreciable quantities. The samples of all the above varieties have been collected by the Delegation and are available for study at the Council's office.

Colours, Prints & Designs

Japan has been supplying plain fabrics in three different types :

- (i) Washable, which could stand a number of washes,
- (ii) Commercial dyes, which could similarly stand a number of washes, and
- (iii) Fast dyes, which are fast to bleach.

There is a growing preference, however, for the second and the third types of colours which stand many washes. India should endeavour to provide similar fast colours.

It is a pity that we are not able to produce uniform shades as Japan does. Unlike Japan, we have no standard shade cards of our own. We are unable to make available to the commission agents our shade

cards. They send us their own shade cards which we are not in a position to reproduce. As a result the shades are not as demanded or else the goods are not delivered punctually as the mills take time to ensure the exactness of colours. The buyers consequently find it difficult to fulfil their commitments, have to sell at lower rates or else have to pay compensation as there is difference in shades. The Delegation feels that it would help if shade cards are evolved and standardised. The exporters could send those shade cards to the overseas buyer before entering into a contract.

Having discussed the types of dyestuffs required, we now discuss the type of prints in demand. On Spun Rayon fabrics, the prints are mostly machine roll prints which are fast in colour and exact. The demand for printed Spun Rayon fabrics is in the proportion of 70 per cent. to 30 per cent. for plain fabrics. In Filament Rayon fabrics, save for Satins and Crepes where the demand for printed fabrics is comparatively less, prints are also becoming popular. Japan supplies not only machine prints but also screen prints called "Hand Prints." These can be had in 2-6 colours. The prints are so attractive that even 2 or 3 colour designs satisfy the demand of the average consumer. What really matters is not so much the number of colours in the designs, but the attractiveness and the matching of designs that would appeal to the eye of the consumer.

Vat and Pigment prints are generally very popular. A certain amount of flock printing on glass nylon and other synthetic fabrics are also in demand. The fabrics are supplied mainly in screen prints. In Filament fabrics, the ratio of demand for printed fabrics and dyed fabrics is estimated by the Delegation at 40 per cent. to 60 per cent. respectively. On a total assessment of the demand for Rayon fabrics, the Delegation feels that the present demand for printed and plain fabrics is in the proportion of 50 : 50 per cent. This marked shift towards printed varieties is likely to continue and may become more pronounced in the years to come, a point which should be taken note of by the Indian manufacturers.

The designs in vogue differ from country to country. Tastes are fast changing towards the western style prints which can be attributed to the influence of Western illustrated magazines and other literatures, the improvement in communications resulting in greater contact with the outside world, etc. Indian prints are also appreciated but our prints require certain changes and improvements to be able to compete with

Japan. The designs should be clear and attractive. In Africa, certain designs called "African Designs" are popular in the interior, the samples of which are available at the Council office.

Japan accepts a minimum quantity of 7,500 yards for machine print. The minimum quantity accepted for screen print is 3,000 yards. Their prices are different for different types of colours, finish and prints. The charges for fast to bleach dyes are higher. If any special shade is demanded, the minimum quantity prescribed is 500 yards. The charges for machine prints are 2½d. to 6d. per yard, on Viscose Filament fabrics. The charges for screen print on Nylon vary from 10 to 15d. per yard. About ½d. per yard is charged for giving an extra colour over 4 to 5 colours in a design. The charges for special finish are also extra. They charge 3 to 4d. per yard for resin finish on Spun Rayon fabrics.

Printing is a highly specialised job. It calls for a high degree of technical knowledge, experience, creative skill for designs, colour matching and foresight for producing the correct material in anticipation of the changing fashions.

It is felt that our designers and artists should be sent to these markets for studying the preferences of the people for designs. Japan is sending paper sketches to these markets for approval and also prepares an experimental roll in one design. This roll is sent to two or three markets for approval.

It is axiomatic that in printed goods it is the design that sells, and not the cloth. Designing and matching should, therefore, receive top priority.

Consumer Preferences and Dress Habits

One of the complaints against Indian manufacturers is that they are not keen to manufacture fabrics according to the buyers' requirements. In a highly competitive buyers' market, it goes without saying that sales can be promoted only by offering what the buyer wants. India's export target can be reached by a greater realisation of this aspect by our manufacturers.

Consumers are desirous of purchasing more and more fabrics of varieties that give richness of look to the fabric. This can largely be met by supplying printed fabrics.

The consumer in these countries likes cheap and attractive fabrics though the durability of the fabric is also a consideration. But price is the most important factor.

Consumer preferences of individual markets are thus very important and it is imperative to see that our people keep a close watch over the consumer preference to be able to cater to the requirements of the overseas market.

The dress habits of people in almost all the countries visited by the Delegation have changed considerably during the post-war period and the process continues. The indigenous population in towns has adopted the Western styles of dress and the practice is spreading to the rural areas.

No doubt, price is the vehicle for selling a product. It would be unrealistic to assume that it is the sole stimulant to demand. There are other criteria, such as fashion, climate and the general dress habits of the people. By and large, fashion is an expression of the people's taste at any given time. A study of the people's tastes and dress habits is very important in anticipating demand. Millions of yards are being imported in British East Africa for Kikoies, Khangas, Lungis and Bui-Bui for traditional dresses. In Iraq and Iran and in countries where Muslim faith is followed, millions of yards of black crepe are being imported for Burkhas called Abbas. It is therefore essential to know and meet their needs of the most popular dresses for developing exports.

Minimum Standards

Minimum standards constitute an important factor affecting exports. It was gratifying to note that in general our qualities were improving, yet much remains to be done towards that end. There appears to be a tendency amongst Indian manufacturers to reduce the reeds and picks to suit the prices. Reducing of reeds and picks to a very low standard ultimately makes the fabrics go out of market, as such low standards of construction reduce the durability of the fabrics considerably. The Glass Nylon is a glaring example of the same. It is very cheap in price and yet it is fast disappearing from the market. Even our competitors, it was noted, supply fabrics of lower reed and picks, but they do not usually manufacture fabrics of such low grades.

In India, we have to take a long range view of this problem. It would be in the interest of the industry if the temptation to lower the grade of construction is resisted even though it is often done at the

instance of the overseas buyer who wishes to have the fabrics at the cheapest possible price. For this purpose we strongly feel that minimum standards should be fixed for all the varieties.

Standardisation of Brands and Distinguishing Numbers

In the overseas market, Japan supplies fabrics with fixed Brands or Numbers, which have become popular. Japan has standardised the constructions of some popular varieties and has assigned Brands or Numbers for these varieties. For illustration, Satin No. 3600, No. 4000, No. 8000 or in Spun Rayon, Muslin No. 9 or Muslin No. 1, are qualities which have got standard varieties and can use the Brand or Number fixed therefor. Any importer who wishes to buy Muslin No. 9 is free to buy from any manufacturer, who is at liberty to use that Number only if he supplies that particular construction. When the importer buys Muslin No. 9, he is confident that this fabric is of a particular standard construction. We should try and standardise the constructions of a certain number of varieties in each weave, like crepe, Taffeta, Satin, etc. Once these Brands or Numbers and the constructions thereof have been standardised, any manufacturer in India could manufacture them and put the Brands or Numbers along with his own Mills' name and sell them as such in the local as well as at overseas market. This would generate confidence in the overseas market which could ask for certain varieties from India which will be of specified standard construction. The Brand or Number will have to be registered with the Council and will have to be publicised in the overseas markets. The varieties which should be standardised should be those which are in vogue in the overseas market, looking to the competitors' quality. To start with, some 3 to 4 varieties may be standardised in each weave.

This suggestion of standardisation should become helpful to the Industry. The Industry will soon come to know what are the most popular varieties in the overseas market and the constructions of the same. This would also help the overseas Importer.

Inspection

Having standardised a number of varieties for export, with their Brands or Numbers and the minimum standards prescribed, another important consideration would be the quality of fabrics from the defects point of view. Though Japan is also supplying fabrics in lower reeds and picks and at cheap prices, those fabrics are comparatively defect-free compared to Indian fabrics. The consumer is also becoming more quality-conscious. It is high time that the Indian Industry started get-

ting quality-conscious too. Suitable machinery may have to be devised to ensure that fabrics which are defective are not allowed to be exported. The ultimate objective of the Council and the Government should be to see that the Industry is able to produce and export fabrics as defect-free as possible. The approach should be realistic looking to the present conditions under which the Industry is working and to the quality of the fabrics produced. The inspecting authorities should see that the standards of inspection are enforced in the initial period with a liberal mind to prevent a dislocation of the export trade which is slowly gaining ground.

Production of Various Types of Staple Fibre

To manufacture the varieties discussed above and to maintain the standard of quality, some help from the Government and other sister industries would be necessary. Without it, it will not be possible to offer standard quality. The Government may, for instance, persuade indigenous manufacturers of staple fibre to undertake production of full dull and half-dull staple fibre. This is essential, if production of Spun Rayon fabrics is to be encouraged. The weaving industry should be supplied different types of good quality spun rayon yarn in different forms and combinations. Doubled yarn of all counts and varieties should be also made available. Further, the spinning industry should also be induced to spin staple fibre yarn in different blends, e.g., Acetate and Viscose Staple blends, Nylon and Viscose, or Nylon and Acetate Staple blends. If the indigenous industry cannot supply these staple fibres, the Government should allow the import of such fibre or yarn as are not being locally manufactured.

It is felt that at the prevailing prices of staple yarn and with the existing incentives for staple fabrics, it is not possible for the Industry to compete in foreign markets with Japan whose prices for staple fabrics are much lower. Therefore, the Government will have either to give more incentives for staple fibre fabrics or continue the existing incentives and ensure that the weaving industry gets the staple fibre yarn at cheaper rates for export of Spun Rayon fabrics. We have to remember the fact that the demand for spun rayon fabrics is 60 per cent. of the total demand for rayon fabrics.

Continuity of Supply of Yarn—Advance Licences

In the interest of exports, it is necessary that the quality of fabrics is standardised and to make sure that yarn, which is used in manufacture, is available in standard qualities without any break in its supply.

For this purpose the Government should grant licences for the import of yarn in anticipation of actual exports. As present, the Government grants licences to import yarn after the exports have materialised. However, this creates two basic difficulties in the production of good standard quality fabrics and in its sale in the overseas market.

Firstly, exports may be low during a particular period due to the slackness in overseas markets. As a result of this, either the manufacturer exports less, or he is forced to reduce his prices in the overseas market, to maintain his sales somehow. He is obliged to do so to obtain import licences for yarn in order to run his factory.

Alternatively, he runs short of his supply of yarn and to be able to keep up the production and exports, he buys whatever type of yarn is available in the local market. This process spoils the standard of his product and ultimately the export market itself.

Secondly, as a substitute for this, he may have to make a forced sale in the overseas market by reducing his prices. It becomes very difficult for any manufacturer to raise once again the prices once he has reduced them. The country also loses valuable foreign exchange. Keeping these points in view and the long delays involved in getting yarn licences from the authorities concerned, the Delegation is of the considered opinion that the manufacturer should get the yarn licences in anticipation of exports. The advance licence should be issued after taking necessary Bond of proper fulfilment, with a penalty Clause added in it. This licence may be granted for six monthly requirements and it should be reissued thereafter only if the exports are completed against the previous licence. We feel this will greatly help the industry in producing standard quality fabrics and their sale in the overseas market.

Quality of Indigenous Yarn

In the manufacture of fabrics of fair and good standard, the quality of the raw material used, i.e. rayon yarn, plays an important part. The present quality of the 1200 and 1500 of indigenous yarn, which is also used in the manufacture of fabrics exported, cannot be said to be of the required standard. To enable the Rayon Weaving Industry to compete successfully in the overseas markets, suitable standards should also be laid down for the first quality indigenous rayon yarn. The rayon spinning industry at present supplies 2nd and 3rd quality yarn on a large scale. This deteriorates the quality of fabrics, which causes a fall of exports and also creates other difficulties to the Rayon Weaving Industry.

At present the differentials between the 1st, 2nd and 3rd quality rayon yarns are only nominal. If the said differentials are widened, it may make it necessary for Rayon Spinning Industry to adopt measures which may step up the production of first quality yarn.

Contribution towards the Export Drive

Industries generally are experiencing difficulty owing to the shortage of foreign exchange. Exports have therefore become a question of life and death for them and the rayon industry is no exception to that rule. The Rayon Weaving Industry is earning a major part of its foreign exchange requirements through exports and is trying hard to build up export market for its fabrics. The cost of indigenous rayon yarn is high which makes ultimately the price of the fabrics uncompetitive in the foreign markets. It would, therefore, be in the interest of all, that the spinning industry should also contribute towards the export drive.

Continuity of Market

It has been found that even after we are able to establish one quality in foreign markets as per their requirements, its supply is suddenly discontinued. This happens because we either switch over to a more paying quality, or to another better paying market. This attitude needs correction. It must be realised that exports are to capture the foreign market, which provides not only the raw material but also an opportunity for expansion and for reducing costs of production. It should not be forgotten that buyers prefer to purchase their requirements from a source which is both regular and dependable in order that their business earnings may not be adversely affected by sudden cessation of supplies. Any interruption in supplies disturbs and displeases the buyers. Once a given quality of goods is pulled out of a market, it becomes difficult to reinstate it. Exports also act as a stabilising factor in the internal market, as many more and bigger markets are available for the consumption and sale of our goods.

Method of Selling

Broadly speaking, organised methods of sale would always help to increase exports. The thing that requires our attention is the **method of quoting**. The prices in most of the countries are quoted primarily in Sterling and/or American Dollars. We suggest that the Council should guide the industry as to the currencies in which the exporters should quote for different countries. The Council should also inform exporters that in case of countries like Iran and Iraq, the weight of fabrics should be given specifically because the customs duty is levied on the basis of

weight in these countries. The purpose is to facilitate the calculation of landed cost by the overseas buyer.

The Indian exporter is not aware of the rates quoted by competitors in the foreign markets. It is necessary for developing exports that our prices are more or less on parity with the prices quoted by our competitors, even though the prices offered to us in the beginning may quite likely be less in comparison with those offered to our competitors. In the absence of proper knowledge of the competitors' prices, the Indian exporter either over-quotes or under-quotes which create confusion. Foreign suppliers regularly get the competitors' prices from their representatives abroad. It is necessary that the Indian exporter is also kept informed of the prices prevailing in the world markets. The feasibility of collaborating with certain agencies in different zones, for collection of price data at various centres may be considered. This could be circulated by the Council to its members in a monthly bulletin.

In addition to prices, the collection of samples of varieties which are popular for one reason or another is equally important as the industry can be kept regularly in touch with not only the qualities in demand but even the type of finishes and prints popular in the overseas markets.

It is suggested that the Council should associate itself with certain agencies which can collect regularly (at least at an interval of two months), the samples of all varieties of fabrics, on sale in the foreign markets.

Information should also be collected regularly regarding the total imports by varieties of rayon fabrics in each overseas country, mainly from Japan. This information can be had directly from Japan itself. This information would be very useful and should be circulated to the industry in a monthly bulletin.

No useful purpose is served by the Council if it publishes the statistics in the form in which these are received. The Council should add its own findings, remarks, summaries and conclusions, which may be of more use to the industry.

Distribution Channel

The Delegation feels that the exporter may undertake to sell in the overseas market through such people who can act as a liaison between the overseas importer and the Indian exporter. For this pur-

pose, it is desirable to appoint some agencies both in India and abroad. These may be commission agents, who may book orders for the Indian exporters and may also keep the exporters regularly informed of the popular varieties in demand, prices, tastes and habits of the people, etc. They should also regularly furnish samples which will give an idea of the designs, matching and finishes. Moreover personal contacts are likely to build up better relationship. (For detailed lists of commission agents and importers in different countries, see appendix in Part III).

The appointment of commission agents is necessary to compete with Japan who has got big Export Houses which control the entire export business of Japan. These Export Houses have got their regular representatives and offices in all the countries, and have got commission agents as well in each country through whom they collect all the afore-said information, book orders, and generally cater to the demands of the importing countries.

Methods of Export

After discussing the steps necessary for the manufacture of goods and for selling them we may reflect on the "Methods of Export." By "Methods of Export," we mean execution of export orders or contracts. There was a general complaint regarding the "Methods of Export," even for other industries. The Delegation concentrated on the "Methods of Export" in rayon industry which are so defective that many overseas buyers are not inclined to undertake the distribution of our rayon textiles. This is so, because the overseas market is completely a buyers' market. The importers naturally buy from such countries who offer the best prices and margins of profits and after the least amount of difficulty. In this respect Japan scores over all other countries. As regards Indian fabrics, apart from the prices, importers confront so many other difficulties that they avoid dealing in Indian fabrics. This also reduces the number of distributing channels, and makes possible the sale of fabrics at lower prices than the competitors' prices. About 8 to 10 per cent prices are lost just because of our "Method of Export" being creaky. There are a number of small and big points which together make up the "Methods of Export." In the highly competitive market all the points should be looked into in the order of their importance. Briefly these may be classified into :—

1. Lack of Confidence.
2. Defective Export Procedure.

1. **Lack of Confidence:** The overseas buyer has no faith in our export procedure and hardly any confidence in the Indian products. Lack of confidence is due to:

(a) **Goods not being as per sample:**—Shipments are not exactly as per samples shown to the buyers and approved by them. The exporters show the sample of one construction and ship the fabrics of a slightly different denier or construction. The finish too does not tally with the samples.

(b) **Variance in colour, assortments and designs:** The colour assortments and designs are not often according to contract. In such cases, the importer has either to sell the goods at lower prices, or if the goods have already been sold, to settle the claim with the wholesaler or the retailer by paying compensation.

(c) **Deliveries not in time:** The overseas buyers complained to us as well as to the Indian embassies that the Indian exporters fail to fulfil the contract within the agreed delivery period and ask for extension of Letters of Credit which involves heavy and unnecessary expenditure to the foreign buyers and their money gets blocked. Besides, they lose their normal business profits of the season. The exporter also at times ask for many amendments to be made in the Letters of Credit. This happens because proper instructions are not sought for in the beginning.

(d) **Settlement of claims:** It was also complained by the foreign buyers that the claims were not settled quickly. Speedy disposal of claims is imperative for maintaining better business relations. It would, therefore, be good if in the event of a dispute, some representative of the Council were asked to survey the goods and furnish a report to the exporter and to the Council to enable speedy disposal of the claim. This matter merits detailed consideration. We have further suggested in our report that a standard Contract Form be drafted by the Council, and a Committee be appointed under its auspices to settle disputes. Whatever machinery is set up, it should be so empowered to not only to settle the claims expeditiously but also to enforce its decisions. In case, the claims involve very small amounts, it is desirable that the buyers' word be accepted and the claims are settled without an argument.

(e) **Wide price fluctuations in Indian fabrics:** It has been noticed in the past that the prices of Indian fabrics had become very speculative and, as such, the importers refrained from buying. Moreover, abrupt stoppage of supplies has given an impression that supplies from India

are not certain. They, therefore, like to buy Indian goods only if the prices are very competitive because, then, they have to establish the goods once again against our competitors. The Delegation tried to dispel their fears about the future. Government has its own share of responsibility for the state of affairs and should see that the exports are not dislocated abruptly from any particular country. In our opinion, confidence will have to be restored by stabilising the quality of Indian fabrics in the foreign markets, which is possible only if the Indian exporter quotes prices which can compare favourably with the foreign competitors' prices.

(f) **Ignorance about good exporters:** The foreign buyer does not always know the party he is dealing with. Sometimes, Indian exporters ship sub-standard goods, which involve the foreign buyer into heavy losses. The Council should prepare a list of Indian manufacturers and exporters, suitably grade them and publicise it overseas. This list should also be made available to our embassies.

2. **Defective Export Procedure:** Foreign buyers complained that they faced more difficulties with Indian goods than with goods from other countries, including in some cases monetary losses. Their difficulties are enumerated below:

(a) **Packing of cases and pieces:** A common complaint was that the wooden cases were received badly damaged in transit. The Delegation itself noticed that the packing was deplorably poor generally. It was observed that this was on account of the inferior quality and the thinness of the planks used. Because of this, the cases broke in transit, resulting in pilferage and damage to the fabrics, causing losses to the buyers. It was further observed that the cases were nailed carelessly, causing damage to some pieces inside.

The construction of the wooden cases itself was defective. The complaint about the cases is so genuine and important that, in the Delegations' view, a standard should be laid down immediately by the Government and the Council, in consultation with the Indian Standards Institution or some other expert body. This standard should prescribe the quality of wood, the thickness of planks, the size of the case, and the weight of goods which can be supplied in each type of case. However, till the Government lays down the minimum standards in this behalf, and the manufacturer is able to prepare the cases on the Japanese lines, he must immediately start using thicker planks and better quality of wood, with hessian wrapping over the case to avoid

the breakages in transit. To add strength to the cases, 3 to 4 bailing hoops should be used around each case.

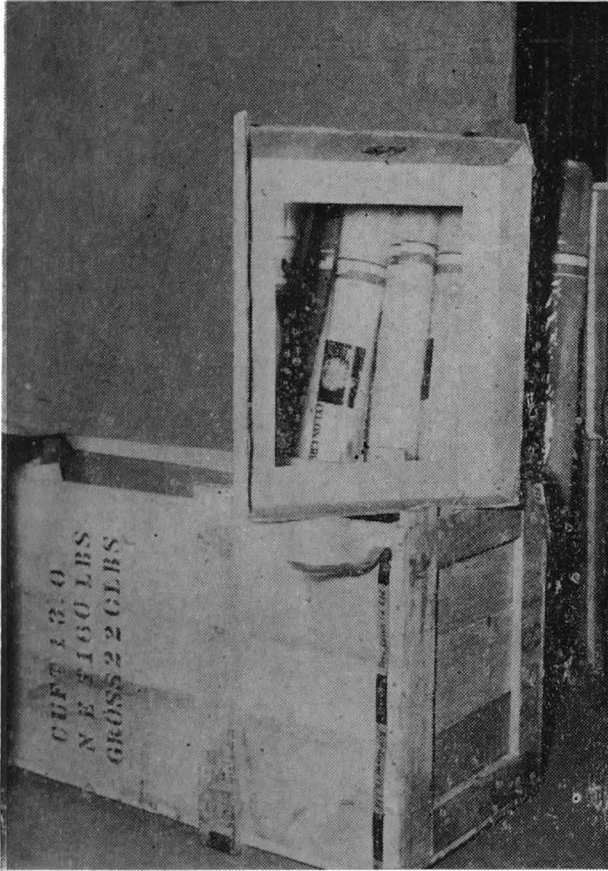
To give an idea of the standard case packing adopted by Japanese exporters, the Delegation has taken a few photographs of these cases, which can be seen at the Council's premises.

It should also be seen that the pieces are packed in such a way that no loose space is left inside the case, which causes shaking of the pieces and consequently damage to the fabrics as well as to the cases. The exporter should, therefore, take particular care to pack the pieces up to the top so as not to leave any loose spaces inside the case.

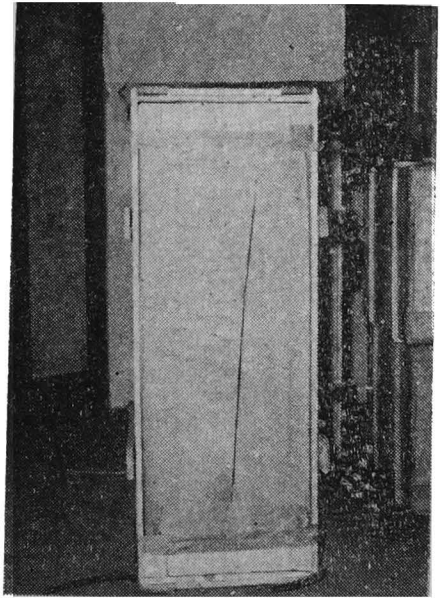
(b) **Packing inside the case:** The Council should standardise the quality of craft paper and the number and size of sheets to be used. Proper care should be taken to see that no nails are driven into the cases so as to damage the fabrics. If sufficient packing space is left on all the sides inside the case and corrugated card board pieces are used to fill in these gaps, damage to actual goods, in the event of nails protruding inside the cases, can be avoided. We would recommend that waterproof paper be used invariably as seasons vary from country to country. Waterproof paper should not be used in small strips or pieces, but only large sized single sheets, so that it gives proper protection on all the four sides of the case. It should also be seen that the two ends of the waterproof paper overlap sufficiently. This will protect the goods against moisture and water.

(c) **Piece Packing:** The piece packing should be made very attractive. First of all, the frames and tubes should be of sufficient strength. Japan uses frames with rounded heads; and paper tubes, instead of wooden sticks used by rayon industry in India. The tubes are of hard paper and do not form dents or break, even after rough handling. In case paper tubes are not used, even wooden sticks may be used, but it has to be made certain that the first few yards of the fabric do not get crumpled. The stick should be sufficiently thick and covered with good brown paper. The sticks and frames should also be treated with insecticides. Though the frames may not be necessarily of rounded edges, they should be strong enough, and should have attractive paper stripes on both sides.

(d) **Cellophane packing:** The paper stripes used on the piece packed on frames or rolls should also be attractive and used at even distance. Pieces packed in polyethylene look very shabby, as the semi-

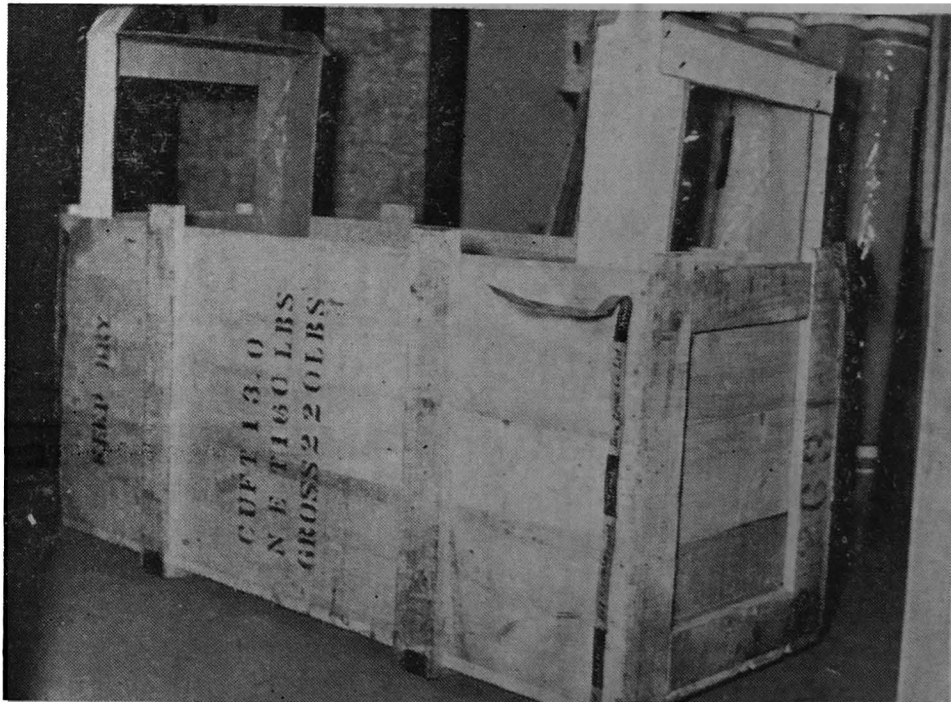


JAPANESE
PACKAGING





JAPANESE PACKAGING



transparency of polyethylene tones down the brightness of fabrics. Our competitors use thicker cellophane which is tightly wrapped around the piece to give a brilliant transparency, thereby making the piece look attractive. Polyethylene should be used only in the event of a shortage of cellophane. But polyethylene, in roll form and the pieces should be tightly packed. With polyethylene, gum tapes should be used.

The Delegation recommends that the Government should allow the import of cellophane paper more liberally if the demand of the industry cannot be met from indigenous production. The use of cellophane paper for packing adds visual appeal.

In case of more costly fabrics, Japan provides still better packing. An additional covering is provided on top of the cellophane wrapper. Attractive box packing is not uncommon. Special care is taken in the case of such packings.

All these aids to appearance impress the importer and explain his preference for the better packed goods of our competitors, which India cannot afford to ignore. The Delegation feels that the Indian manufacturer must immediately think seriously of packing on the lines discussed above. Simultaneously, the standard of packing should also be laid down by the Government and the Council, and every exporter must adhere to such standards.

(e) Stamping and Brand Numbers: It was also pointed out to the Delegation that some of the pieces are marked in a very shabby manner. On many pieces, the yard lengths of the pieces were marked in pencil which are erased. It is suggested that the yardage of the pieces should be marked in bold letters by rubber stamping. It is noteworthy that our competitors use shining gold lettering for marking the name of the manufacturer, the quality of the fabrics, the length of the piece, the speciality of finish, etc. The Indian Industry should also give the markings on the pieces in brilliant gold lettering. The stampings should be as minimum as possible on the front end and back end of the pieces so as to avoid wastage of fabric.

Further, the exporters should give a number or brand to each fabric, so that it becomes popular and known as such in the overseas market and may be demanded by that number or brand only. It was felt that the goods sell more by brands or numbers. This brand or number should be in gold letters on the pieces, in a prominent position, and that brand or number should not be discontinued or changed unless

it becomes absolutely necessary to do so. The competitors not only give a brand or number but also seek to popularise their products by a photograph of some beautiful object, which becomes a part of the standard marking in course of time. As such, it would be in the interest of the industry to use photographs in addition to the brands or numbers. The photographs may be on glossy paper. Two to three small round or square labels pasted on the piece will enhance the beauty of the packing.

(f) **Marking:** The markings on the cases should be done in a legible manner by stencil using indelible ink only, and not as it is done at present. The markings should be so clear that the overseas buyer has no difficulty in getting the goods released. It was reported that at times the markings were illegible, thereby creating avoidable difficulties in getting the goods released promptly on arrival.

(g) **Sampling:** The Delegation observed that there was a severe criticism of and dissatisfaction with the samples supplied by Indian manufacturers and exporters. Our samples are unattractive and drab and do not give any idea of the variety and packing which the manufacturer wants to offer. The size of the samples is generally too small, whereas our competitors furnish full size samples, freely and liberally made out in an attractive and impressive way.

It should be recognised that it is the sample that forms the basis of all business. The sample represents what one wants to sell. It must, therefore, accurately represent the product and should do so in an impressive manner. Unattractive and poor samples prejudice the minds of the prospective buyers and lack sales appeal. The importance of first rate samples cannot be over emphasised. All the manufacturers must make it a point to supply the overseas customers with attractive samples in book form preferably, as is being done by Japan. A sample book should contain at least one piece of sufficient length in full width, of one shade or design, nicely folded, together with a number of other small pieces of other shades, uniformly bound together in a glazed, good lettered, sample book. The full sample piece must bear all the markings, also in gold lettering as a full piece would normally have. In addition to this, Japanese sample books not only contain samples of the fabrics that are shipped, but also represent the mode of packing done on the fabrics. The first sample piece in the book is packed exactly as a replica of the packing of the piece to be shipped. We should also prepare sample books in a similar way. The sample cuttings should have uniform finish without any defects—weaving, dyeing or printing—in them.

Apart from the individual sample books, collective sample books containing samples of different varieties, or one variety in different designs should be sent to the commission agents and overseas buyers for booking orders. The sample book should contain the following details:—

1. Trade Number
2. Description of the fabric
3. Brand, or Number, if any
4. Deniers used in warp and weft
5. Width
6. Rate per yard
7. Packing details such as number of pieces in the case, and yardage thereof, together with the gross weight of the case, and the nett weight of the contents therein.
8. Percentage of different fibres, if used, in the manufacture of the fabric.

The same particulars should appear in the shipment sample book also.

The designs should be approved by the overseas buyers, by sending them the sketches thereof before the sale materialises.

It may interest the Indian manufacturers or exporters to know that the Japanese exporters send a number of paper sketches of their designs which enable the buyers to select the exact designs required by them. Where the buyer wants any changes in the designs sent to him, he returns the paper sketches to the exporter with his suggestions. The exporter modifies the designs accordingly without much loss of time. The Indian manufacturers and exporters should follow this method to attract buyers.

The importers further complained about delays in sending the shipment samples by our exporters. They insist on at least two sets of shipment samples being invariably sent by air-mail to the importer, so that they reach the destination sufficiently in advance of the arrival of the steamer, to enable the importer to effect as much forward sales of the goods as possible. A further set of samples must accompany the shipment by Sea Mail.

(h) **The Standard Piece Length:** Japan and other continental countries are supplying goods in fixed piece lengths of say, 25 or 30 yards. It may be added that out of every 10 cases sold by a Japanese Exporter, 8 to 9 cases contain fixed length pieces and only the remaining

one or two cases contain odd length pieces. On the other hand, an Indian exporter supplies most of his goods in odd lengths, and many pieces have fractions of a yard. Some of the overseas buyers explained to us that they quote the rates in the local markets not on the basis of yards, but on the basis of pieces on account of the illiteracy of the people in the upcountry markets. In case, a piece is more by a few yards than the standard length of 25 to 30 yards, the price quoted by the wholesaler will, naturally, be higher. The consumer being illiterate, feels that he is being unnecessarily asked to pay higher price and so refrains from buying. The importer therefore likes to avoid odd length pieces.

It was also brought to our notice that certain fabrics are being sold in the market in certain fixed multiple lengths only. For example, 44" cloth is sold in 5 to 6 yards length, with the result that if the pieces are supplied in odd lengths, cut pieces are left out.

The industry should endeavour to give the standard piece lengths or multiple piece lengths which are preferred by the overseas buyers. In no case should the Indian exporters ship piece lengths in fractions of a yard.

(i) Preparation of Documents: There is a recurring complaint that the requisite number of copies of documents necessary for import are not sent to the foreign buyers. It is imperative that as many copies of the documents as are required by the foreign buyers, are sent. Two negotiable copies of documents should be sent through the bankers. Two additional copies of the said documents have to be sent with shipment samples, by air-mail immediately after the shipment is effected. These should reach the importer sufficiently in advance of the arrival of the steamer. Due to proximity of these countries to India, the steamer reaches their ports within 10 to 15 days. Even the bankers should be requested to negotiate the documents immediately, and forward them to their branches and/or correspondents by the first available air-mail. Delay in negotiations by the bankers entails late deliveries to the foreign parties, resulting in demurrage charges, which are obviously resented. To avoid delays, the particular days of air-mail to each country should be noted.

(j) Credit Facilities: One of the other ways of promoting sales is to attract the buyer by giving credit. In Iran, long term credit is in vogue. Indian exporters and manufacturers may consider giving credit there. The main advantage in giving credit is that the rate of interest

is as high as 15 to 24 per cent. This higher rate of interest becomes a part of the price, the prices obtained being better.

(k) **Standard Form of Contract:** The above-mentioned are the main defects that are prevalent in our "Methods of Export." If suitable steps were taken to enforce these methods on the industry, it is felt that not only will there be a great scope for the distribution of Indian fabrics in the overseas market, but they would also definitely fetch 8 to 10 per cent better prices in time to come. This little extra cost that may be incurred will be well repaid in due course of time. The enforcement of the methods suggested above is, therefore, very necessary for the benefit of the industry. Keeping this in view, we strongly recommend that the Government and the Council should draw up a **Standard Form of Contract**, (the broad outlines of which have been discussed later) and enforce it upon every exporter. The Standard Contract Form may be given wide publicity, even in the overseas markets. Our Embassies should intimate to the Council where the "Methods of Export" as defined in the Standard Contract Form are disregarded.

Simultaneously, a committee under the auspices of the Council, consisting of one representative of the Government, two representatives of the industry and two representatives of the Trade, should be formed to arbitrate in the disputes that may arise under the contract. A clause to that effect should be incorporated in the Standard Form of Contract. This committee should recommend to the Government penalties such as the reduction of incentives in case where the claims are not settled as per its findings.

We suggest that the Council may work out the details of the Standard Contract Form in collaboration with the members of the Delegation. A broad outline of the form is as follows:

The Standard Contract Form should contain all the "Methods of Export." It should also contain all the instructions the importer wishes to give to the exporter together with all the terms and conditions relating to the Contract. For example, it must contain the full name and description of the variety ordered with its Trade Mark, Brand or Number; particulars of the lengths of the pieces, the delivery period; instructions regarding case and piece packing and the necessary information about opening of Letters of Credit and other documents. Currency for disclosing the prices and other necessary details. The shade cuttings, design cuttings, with their matchings and assortments should also form a part of the contract.

A foreign buyer entering into a Contract on the Standard Contract Form will deal with greater confidence about the quality, shades, finish and shipment etc. This will not only promote sales considerably, but should bring the standard of our quality in line with that of Japan and thus fetch better prices for our products.

(1) **Customs Procedure:** There was a complaint that the Indian Customs authorities also cause some difficulties, some of which have been listed below:

Complaints were made that from each consignment of sarees, a small piece is cut from one saree. Whatever may be the routine requirements of our inspecting authorities, this renders that saree useless to the overseas buyer. The same is said to be the case where cloth is supplied in multiple lengths of 5 or 6 yards. This multiple length is also used for a standard type of dress. In case even half yard is torn from the multiple lengths, the full multiple length becomes useless and entails a loss to the overseas buyer. It is, therefore, suggested that the Customs authorities should avoid cutting sarees or saree materials and should find out a way to avoid causing loss to the exporter or to the importer.

Secondly, when the inspecting authorities stamp their seal, on the fabrics, they do it in such a way that the impression of the seal appears on more than one layer of the fabrics. This could be easily avoided by placing a card board or some still impervious substance below the portion of fabrics to be stamped, so that the impression is not transmitted to the other layers. Further, the stamp should be put at the extreme off end of the piece.

Thirdly, the goods inspected at the docks reach the overseas buyers in bad form, because they are re-packed crudely.

Lastly, it may be of interest to note that the stamp "passed" affixed by the inspection authorities in India is taken by the overseas buyers as the equivalent of the Japanese stamp of 'Passed'. They believe that the Government of India has been playing an active role as in Japan, in seeing that the goods are exported in a proper way and are also of good standard. The Delegation explained the position to the overseas buyers that the meaning of the stamp 'passed' is that the industry and the Government are both becoming quality conscious. The industry is gradually improving its standards for export. Such steps reassure the overseas buyers.

Continuity of Adequate Incentive Scheme

The Government knows that the cost of production of rayon fabrics in India is much higher than the prices prevailing in overseas markets. No exports are possible unless adequate incentives are provided. It is reported that even Japan, where cost of production is low, has been giving incentives for exports. As such, besides the cost of production which must be low, incentives also play an important part in determining the manufacturing cost, and sale price of the fabrics. The present prices quoted by our manufacturers are slightly higher compared to the Japanese prices. It may be emphasised in the context that Indian manufacturers obtain prices overseas which are about 8 to 10 per cent lower than the Japanese prices because of our present Methods of Export. As our quality is not of the same standard as of Japan, the prices obtained should be still lower (to the extent of 8 to 10 per cent). In the aggregate, the prices should be lower by 15 to 20 per cent. If the present incentives cannot be revised upwards, these should at least be left as they are. In the case of staple fabrics we feel that the incentives given for exports are not encouraging enough and should be raised.

Incentive for Colours and Chemicals

Just as continuous supply of yarn is essential, likewise the availability of standard dye-stuffs and chemicals plays an important part by enabling the manufacturer to provide proper and uniform shades, regular finish, and fastness of colour and print. The Government should see that proper incentives are granted for supplying in adequate quantities of dye-stuffs and chemicals to the industry. Otherwise it would not be possible to standardise shades, finishes and designs. It will also not be possible to give finishes to compete with Japanese standards.

The cost of dye-stuffs and chemicals constitute an important part of the total cost of production of Rayon fabrics. These are available in Japan at cheap rates and in sufficient quantities. If India has to compete with Japan successfully, the Government should issue Actual Users' licence to the manufacturers or licences for processors for dyes and chemicals. As an alternative, it should increase the percentage of dye-stuffs and chemicals to be imported to 10 per cent of the value of yarn licence issued against exports. The existing restrictions on the import of certain items of dye stuffs and chemicals which are not available locally should be relaxed.

Packing Materials

Good quality packing material e.g., glazed gold lettered sample folder books, cellophane etc. are not available in India. The Government should examine the possibility of following a certain percentage of imports of such items against yarn licences.

Rationalisation and Modernisation

It would soon become difficult for India to compete in the near future with countries where factories are equipped with modern machinery. There is an urgent need for immediate rationalisation of the rayon industry, if India wants to retain its present share of exports, disregarding for the time being the question of further expansion. Rationalisation should be a continuous process which should keep pace with technical developments in the country and abroad. With the modernisation of mill equipment, the objective of quality at a competitive price can be achieved. In view of the need to export, this factor will, it is hoped, receive the attention it deserves in the appropriate quarters.

Simultaneously, our methods of processing and the finishing technique have to be improved. Other countries have made big advances in this field. Rayon is a chemical yarn and as such processing is the life blood of the fabric. In the Delegation's opinion processing is going to be one of the most important points in promoting exports of rayon fabrics. Modernisation of Indian processing houses is a vital necessity and it must be attempted as quickly as possible. This can be done with the active assistance of the Government, which could issue licences liberally for the import of up-to-date machinery, preference being given to processing machinery.

Publicity

Publicity is a powerful medium for introducing and popularising any products to the largest number of potential buyers — traders and consumers. The Delegation feels that at this stage, when Indian products are unknown in foreign markets, publicity at consumer's level is not very necessary, and will not serve much purpose. Even the trader who handles business is not yet fully aware of Indian products. The publicity at trade level is more important at the moment than at consumer level. In our opinion, the Council should invite samples of larger lengths from various Indian manufacturers and make a representative collection thereof. This collection should be shipped to overseas markets. Arrangements may be made in collaboration with our Embassies for exhibiting these samples at our trade centre. We found show rooms at most of

the places visited by the Delegation. Elsewhere these are under preparation. It is gratifying to note that the embassies showed their readiness to display such samples at regular intervals.

The method of sending such samples is very important. The samples should be in 2-3 yard length pieces, and not $\frac{1}{2}$ yard or 1 yard, and these should be attractively packed in cellophane so that they may not get spoiled and unpresentable. Our embassy and representatives abroad should invite traders to tea etc. to show them the samples and also provide other details such as the names of manufacturers, prices etc. This kind of personal publicity should serve its purpose if undertaken twice a year. The exhibition should be open to the public.

Having displayed the samples at one place, they should be re-packed and transmitted to another centre to get there in time for a similar display. As such one set of samples can be exhibited at 6 to 8 places. The display should not last more than 8 to 10 days at any one place. On the opening day of the display a "Supplement" should appear in one of the local newspapers styled 'Indian Rayon Week'. This will ensure publicity to consumers as well as to traders and will bring prestige to the Indian products.

Special care should be taken in packing these samples, in steel trunks preferably to make them last longer. Expert advice may also be taken as to packing and shipping of such samples for display purposes.

Freight and the cost of entertainment overseas at the time of the display will have to be borne by the Council. This cost is not expected to be high. The cost of the "Supplement" in the press also will have to be borne by the Council. However, in this case, it is possible to get many Indian Manufacturers, Exporters and Local traders to contribute to the advertisements which may appear in that "Supplement." Similarly advertisements may be collected from leading importers in the overseas markets. This will reduce the cost of the "Supplement" to the minimum.

This type of publicity may be undertaken only twice a year to start within countries where the potentiality of Indian exports are the highest. With this, the literature for washing should also be provided as it is necessary to educate the overseas consumer about the ways of washing the Rayon fabrics.

The most economical method for individual advertisers would be to send attractive calendars. The Delegation feels that the best way of

publicity, at this stage for an individual manufacturer is the man on the spot who can become the real salesman and can offer automatically the best publicity.

The present rayon magazines and the press publicity which is being carried on in some small way, is not very productive.

If it is decided to continue the bulletins, these may in future carry more samples, in smaller cuttings, of fabrics which we are seeking to export.

Salesmanship

An impression prevails in some of these countries that India manufactures only grey and cheap varieties. The Delegation tried to dispel this notion by acquainting them with our fancy and finer qualities, plain and in prints. This lack of information, however, stresses the need for, and importance of publicity and aggressive salesmanship on the part of both the manufacturers and the exporters. It would be well to remember that good salesmanship is the instrument of selling goods under present day conditions. Representatives of manufacturers and shippers from other exporting countries regularly visit foreign markets to push the sale of their products. They stay on at each centre for days together studying in detail their various requirements, sources of supply and the changes in consumer preferences. Personal contacts thus established remove misgivings and provide first-hand knowledge and information about the requirements of local markets which go a long way in fostering goodwill and cultivating confidence and better understanding among the buyers.

It is important that Indian manufacturers and exporters should follow the practice of sending abroad their representatives, including technicians to study those markets. The manufacturers could then make a determined effort to meet the requirements of the consumer.

Export Houses

It is necessary to consider some aspects of the working of Export Houses in Japan. Japan possesses a number of big Export Houses. These Export Houses play a very vital role in furthering export trade by undertaking to export not only textiles but many other commodities manufactured by Japan. They sell textiles in particular. They may sell them on commission basis, or may buy them on their own account in the finished or the grey form. They get them processed and resell under

their own brands or numbers which are already known abroad. By having large turnover these Houses are able to maintain their offices all over the world and also have their representatives and commission agents working for them, through whom they are able to cater to the demands more effectively. They also study the market preferences, the taste for designs and also the difficulties which the overseas buyers experience. They act as useful links between the Japanese exporters and overseas buyers. As a result of this, they are able to standardise their methods of production and sale, whereby they enjoy an advantage over any other competitors.

In India, in rayon textiles for example, there are thousands of exporters. It is difficult for them to cater to demands on them in the same scientific manner as it is done by the Export Houses of Japan. We have suggested certain methods of standardisation and of export. The usefulness of such Export Houses cannot be under-estimated. We feel that the establishment of similar Export Houses would be in the interests of the rayon industry.

Market Research

The need for and the importance of market research cannot be overemphasised. It is indispensable under the existing conditions of intensive competition. Any market research in foreign countries should necessarily include a study of the present demand and a reliable forecast of future trends, in addition to scrutiny of special characteristics of the goods in popular demand, standard of designs, performance and prices, methods of distribution, extent and strength of competition from other sources, consumer preferences by brands, types, prices, and qualities, etc. The report should include suitable recommendations. Such a systematic and thorough market research calls for men with special training, experience, and aptitude. Indian manufacturers and exporters have yet to undertake such vigorous market research.

The Silk and Art Silk Mills' Research Association can play a very prominent and useful role in market research. They should make a proper study of the samples which may be sent to them by the Council, or by the exporters, and analyse them with a view to assisting and guiding the manufacturers to produce similar qualities at competitive prices. As SASMIRA gains experience, it may be able to give new designs, styles and finishes with sales appeal for foreign markets. It is suggested that a separate section, exclusively for export enquiries and market research, be set up to help the industry in this direction.

The Council should appoint such agencies which would keep a continuous watch over the markets under their jurisdiction and collect samples of new and popular varieties for analysis by SASMIRA.

Registration of Trade Marks or Labels and Designs

The world today is very conscious of standardisation. As such people prefer to buy the goods bearing a Trade Mark or a label with which they have become familiar through constant use. They decline to purchase goods which do not bear popular Trade Marks or labels. Trade Marks or labels are a powerful media for popularising one's product and for stimulating and sustaining exports. Once a product is popular under a particular Trade Mark or label, no change should be made without the express approval of the buyers. Our earlier suggestion of standardising the Brands or Numbers is different from the registration of Trade Marks. Trade Marks are registered by individual manufacturers with the Registrar, of Trade Marks whereas Brands or Numbers are not so registered.

Registration of Trade Marks is necessary for other reasons too. There is always a tendency to copy a popular Trade Mark or label. If the Trade Mark is not registered, others can copy it freely. This will result in a loss of business as well as of reputation as other products could be sold under an unregistered Trade Mark. Once the Trade Mark has been registered no other party can infringe it.

Japan and the continental countries are also getting their designs registered so as to avoid copy and infringement by others. This avoids unhealthy competition. We suggest that the Council should impress upon the manufacturers and exporters the desirability of registering Trade Marks, labels and designs.

Readymade Garments

Another important feature which came to our notice was the increasing demand for readymade garments in these countries. The people are tempted to purchase readymade dresses rather than to pay frequent visits to their tailors. Readymade garments are cheaper and of good workmanship. For instance, Spun Rayon shirts are available for 2½ shillings and upwards. More detailed study is necessary on this point. The Delegation suggests that some representative or delegation should be sent out to study this factor as the demand for readymade garments is expected to increase disproportionately in comparison to fabrics.

Nylon and Terylene are also getting popular as materials for readymade shirts. Readymade bush-shirts are being imported only on a small scale as wearing of bush-shirt has not become so common.

Council's Office in Iraq

The Delegation observed during its tour that no officer or correspondent is working in these countries, excepting Mombasa (British East Africa) where a correspondent is working as a part time officer for the Council.

The Delegation feels that West Asian markets are very important not only because there is a very big demand for the rayon fabrics, but because the demand is increasing and India can play an important role as the supplier country. Selling textiles has become a specialised job, particularly as the printed fabrics constitute a more important item of demand. Further, it is necessary to have some liaison arrangements on behalf of the Council. The individual concerned could act as the representative of the industry in the overseas market and send the necessary information to the Council.

It would be in the interest of the Rayon Weaving Industry to open an office for the Middle-Eastern market. The best place to locate this office would be Baghdad, the capital of Iraq, where the demand for rayon fabrics is the highest. The representative should be asked to move about from Baghdad to other countries like Iran, Lebanon, Saudi Arabia and other neighbouring countries. This would place at the disposal of the industry very valuable information as the representative shall provide close liaison between the overseas buyers and the Council.

For British East Africa, the present correspondent may continue till business develops on an appreciable scale. The possibility of developing the business here would largely be in the marketing of spun rayon fabrics, which upto now India has not been manufacturing in a big way. Once, we start manufacturing spun rayon fabrics, and our exports go up we may consider the possibility of extending the Council's representation in the whole of British East Africa.

Offices may be opened, wherever possible, in collaboration with the Cotton Textiles Export Promotion Council who already have their establishments in the various countries. This will not only expedite the opening of the offices of our Council but would be to the mutual advantage.

Pure Silk

The Delegation has observed that demand for pure silk fabrics is very limited except in Lebanon. In Iran, protective duties are imposed on pure silk to protect the home industry. At other places it has gone out of fashion with the advent of nylon and other synthetic fabrics and it being more expensive. In Lebanon, pure silk chiffon and satins are being imported from France.

Velvets

As the people in these countries specially in cities and towns are becoming accustomed to Western style of dresses, Velvets are also in demand. In Iraq and Lebanon, better quality of velvets are preferred whereas in Iran, Aden and other countries, lower quality Velvets are in demand. At present the main supplier of velvets, too, is Japan. Velvets of lower quality manufactured by us can have a good demand at almost all these places, the possibilities of which should be explored.

Summary of Recommendations

1. The Indian manufacturer should produce the varieties that are in demand in the overseas markets, and must make a continuous objective study of the changing tastes of the consumers in those markets.
2. India must manufacture 100 per cent. spun rayon fabrics in resin finish, both plain and in prints. The filament and synthetics fabrics should also be produced with slight variations in construction plain dyed and in prints, suitable to the overseas market.
3. The Government should impress upon the indigenous staple fibre manufacturers to produce full Dull and Semi-Dull fibre and allow the import of Acetate and such other staple fibre which are not being manufactured in India to make diversification of production possible.
4. Minimum standards for all varieties should be introduced to avoid lowering of reeds and picks abnormally.
5. Some specifications should be standardised in certain qualities by the Government and Brands or Numbers should be fixed for them, so that the overseas buyer could be assured of standard qualities under these Brands or Numbers.
6. The Government should undertake inspection of fabrics to ensure that very defective fabrics are not shipped to overseas markets. The

quality standards should, however, be enforced gradually to avoid undue hardship and dislocation of exports.

7. The Government must issue in advance sufficient import licences for yarn to enable the Indian exporter to produce standard qualities. This is very necessary, first, to avoid manufacturing the same variety with variations in constructions, and even in shades and finishes, due to shortage of proper yarn. Secondly, it is necessary to avoid forced selling in the overseas market at lower prices in slack season merely to procure supplies of yarn regularly. A proper Bond may be executed as a precaution against malpractices.

8. The issue of advance licences for the import of necessary dyes and chemicals in an increased percentage of the total import licence is equally necessary, as the entire exports are of dyed and printed fabrics.

9. The Government must see that the quality of the indigenous rayon yarn is improved failing which, it will be too much to expect defectless fabrics from the industry. It is a matter for consideration how far a larger difference between the prices of First and Second grade will discourage production of second and third quality yarn.

10. The manufacturer and exporter both must see that the regularity of the supplies of fabrics is maintained in order to retain their overseas market. The Government also should not enforce abruptly and without due warning measures which are likely to dislocate exports to a particular market.

11. The Council should obtain samples of varieties which are popular overseas together with their international prices to let the Indian manufacturer know what they could sell and at what prices. This information should be published by the Council in a bulletin.

12. The Council should collect statistics of exports of rayon fabrics by varieties, specially from Japan; that country being the main supplier to various countries. This information should be circulated to the Council members to indicate the types and varieties that are popular in those countries.

13. The minimum standards should be laid down for packing for exports, which will include the standard for wooden cases, and also the packing inside the cases. All markings of the cases should be in stencil, and indelible ink should be used for this purpose.

14. The pieces should be packed in an attractive manner. As far as possible, cellophane packing should be used instead of polyethylene. The markings should be brilliant, preferably in gold lettering. If polyethylene is used, it should not be in the form of bags, but in rolls as cellophane is used.

15. It would be in the interest of the rayon manufacturers to see that confidence is created in the overseas markets by supplying goods within the period stipulated in the contracts.

16. Documents, viz., Invoices, Bill of Lading and full packing list together with shipment samples, should be sent to the overseas buyers by air.

17. Samples should always be in the form of booklets which should be attractive having large sized cuttings instead of small ones. The sample booklets should disclose full particulars.

18. The overseas buyer prefer standard piecelengths and the industry should endeavour to provide the same. However, fractions of a yard should not be shipped or charged for.

19. The Customs authorities should avoid cutting Saris or Sari materials, and should devise means whereby the importers may not have to lose a Sari or a Sari piecelength of fabrics.

20. Stamping should be done carefully so that impressions do not appear on the other layers of the fabrics.

21. Care should be taken to see that re-packing is not shabby, after the examination by the Customs authorities.

22. For enforcing proper methods for exports, a Standard Form of Contract should be introduced without delay and made compulsory for use by the export trade. In this Contract Form, Methods of Export should be well defined by which the manufacturer will be forced to export in the prescribed manner. The Contract Form should be drafted to contain full and clear instructions to the manufacturers on all points of export. This contract should be publicised in the overseas markets through our embassies who should see that the methods of export mentioned in the contract are being followed.

23. There must be an Arbitration clause in the Standard Contract Form. In the event of a dispute arising between the shipper and the overseas buyer, the same could be taken up for disposal as prescribed. A committee is recommended for appointment under the auspices of the Council, on which could serve one representative of the Government, two representatives of the industry and two representatives of the trade. Such a committee could settle all claims and disputes. In case, the exporter does not abide by the decisions of this Committee it could recommend to the Government appropriate action for penalising the offender.

24. SASMIRA should conduct scientific study for the economic manufacture of fabrics and should assist by suggesting to manufacture varieties for exports, both plain and in prints. The association should undertake to analyse samples received from overseas, and supply information to the Council regularly which should be circulated to the members.

25. Rationalisation of the industry is of utmost importance in the form of replacement of the existing weaving machinery.

26. It is also necessary to renovate and modernise the processing machines to give the products superior finish. Licences for import of machinery for processing should be granted on a priority basis.

28. Publicity at the trade level will be more fruitful for the time being. Such publicity should be done by arranging for the display of larger length samples for the benefit of the trade and the public alike in the countries concerned. Such exhibitions should be organised by our embassies at Display Centres twice a year. A supplement called "Indian Rayon Week" could appear in the local newspapers on the eve of the exhibitions, to acquaint the public fully with the type of fabrics available.

29. It is suggested that an office be opened in Iraq. At the same time possibility of having common offices with Cotton Textiles Export Promotion Council may be considered.

30. There must be proper liaison between the exporter and the overseas buyer. Appointment of agencies in India as well as in the overseas markets is needed by the export trade. The agency may be in the form of commission agents, representatives, exporters, or Export Houses as in Japan.

31. There is a good demand for readymade garments made of rayon fabrics. It is recommended that a study is made by the Council of the possibilities of export of such garments from India.

CONCLUSION

In conclusion we feel that there is a good potentiality of export to these markets. If proper efforts are directed towards this end, our exports can touch a satisfactory level.

The Delegation booked orders for the supply from India of about 9½-lakh yards of rayon fabrics during its tour, out of which approximately 6-lakh yards have been executed the value of which comes to about Rs. 7½ lakhs. This is quite encouraging, especially as the Delegation was more on a study mission than on a sales tour.

Sd/- G. R. Podar

Sd/- Chinubhai Kalidas Patel

Sd/- Haridas Motilal

Sd/- V. J. Radia

Sd - Vadilal C. Gandhi

I R A N

General

Like its western neighbour Iraq, oil rich Iran is one of the Middle Eastern Islamic Nations bordering on the Soviet Union.

With a total area of 620,000 sq. miles, the population of Iran is estimated at a little over two crores, comprising Iranians, Asians, Kurdish and Azarbaijanis. About 70 per cent. of the population are engaged in agricultural pursuits. But, of late, people have been migrating in large numbers to cities like Teheran, Tabenz, Isfahan, Meshad, Siraz, Abadan, Khoramshahr and Ahwaz. The languages spoken are Persian, Kurdish and Azarbaijani.

Teheran, the Capital of Iran, is estimated to have a population of approximately 2 million. Nearly all the requirements of the country are supplied from Teheran. Teheran has developed rapidly into an important Air transit Centre.

The main ports are Khoramshahr, Shahpur, Bunder Abbas, Abadan and Bushire.

Economic Conditions

Iran is mainly an agricultural country, although rich in metallic ores and oil. Oil, however, is its major foreign exchange earner. Keeping in view the economic and strategic importance of the oil industry, the oil business of Iran was only recently nationalised. Besides oil, this country exports Dried Fruits, Cereals, Carpets, etc. The Iranian Government is going ahead briskly with the industrial development of the country. As a result, the standard of living is going up fast. With the improved standard of living of the increasing population, it is expected that the **per capita** demand for consumer goods would go up very fast. The United States is also ploughing in large sums of money for the economic development of Iran, as it has assumed considerable importance due to its strategic position.

Internal Means of Communication

There is a Railway line between Teheran and Khoramshahr. Motor transport also is used for transporting the goods from Khoramshahr to Teheran. Teheran is well linked with other places by roads.

The Railway route between India and Iran traverses Pakistan. The railway terminal is Zahidan and the point of entry is at Wagha. The route is via Quetta. However, it is found that, at present, there is no significant advantage in Indian exporters utilising the rail service through Pakistan, as Teheran is the main distributing centre for all imports and the cost of road freight from Zahidan to Teheran is very high.

Banking

The leading Banks are The Mili Bank, The National and Grindlays Bank Ltd., and The British Bank of the Middle East.

Generally, no advance by way of mortgage or hypothecation of goods is given by the Banks. The Banks accept **hundies** payable after 90 days guaranteed by a person, firm or company, in addition to the executor's personal guarantee. The Banks also advance clean credits to certain parties.

The local currency is **Tuman** and **Rials** and the Exchange Rate is approximately 16 Iranian **Rials** to an Indian rupee.

Market

The entire wholesale and import trade is centralised in Teheran in a market called "**Bazare Teheran**". There are many Sarais in this market viz. Sarai Sultan, Sarai Amir and so on. All types of traders are to be found here. They have their offices on the top floors of the market, while their small retail shops are on the ground floors. Godowns are at the back of these shops. "**Bazare Teheran**" is not a market for the textile trade alone, but trade in all types of other commodities which are sold in Teheran, also is conducted here. This market with covered roof extends over a very wide area. The **Mulji Jetha** Market in Bombay looks like a miniature of "**Bazare Teheran**".

Method of Business

The Art Silk trade of Iran is mainly in the hands of the Iranians. A few Indians and other foreigners are also in this trade, but the imports of last year from India were mainly handled by two or three Indian firms. They import from India on their own account and sell in the Iranian market on long-term credits. The Iranian traders deal with the foreigners either through the latter's representatives there or through Commission Agents. So, to have larger sales, it is necessary to **build up**

relations and start dealing with the Iranian traders, who also handle the main business of other countries like Japan. This is all the more so, because, when the Delegation displayed some Indian samples, the Iranian merchants seemed surprised that India had been producing such fine fabrics at prices in parity with Japan. To have a larger turnover, **more distribution channels are necessary and here the Iranian Importers and Commission Agents** are ready to undertake the distribution of Indian fabrics.

Business from manufacturer or Exporter to consumer is channelled through the commission agent, importer, wholesaler and retailer.

The commission agent charges three per cent commission on sales. The import business in Iran is done mainly on credit (D.A.) ranging from 60-120 days. Some Western countries give credit upto 180 days. Japan gives credit upto 120 days. The rate of interest charged by banks varies from 6 to 9 per cent. p.a., but the market rate of interest varies from 18 to 24 per cent. p.a. even for well reputed parties. As such, competitors find it more advantageous to sell on long credit basis, as the prices thus obtained are higher, because the high rate of interest then becomes part and parcel of the price.

The Delegation discussed with importers and commission agents of Iran various methods of credit. We expressed the view that India may not favour giving such long credits as Japan has been doing. In such case, they suggested that, only if the prices were very competitive in comparison with those of Japan and other countries, they could open Letters of Credit. However, they emphasised that Indian manufacturers and exporters should sell goods at least on the basis of Documents against Payment with facility to honour them within 60 days after sight. For this, they were agreeable to furnish Bank Guarantee. It is significant that they want Documents to be retained upto 60 days, though the goods from India reach Iran within a fortnight. In Iran, it may be added, no demurrage charges accrue for a period of 45 days for goods lying in docks. As such presumably they desire that, instead of giving credits upto 90 days or 120 days as Japan gives, we give them credit upto 60 days for which the Indian manufacturer is guaranteed as the Iranian importer cannot release the goods until and unless he has paid against Documents. For documents against acceptance, the Iranian traders expressed that they were ready to open Letters of Credit for 25 per cent. of the amount and wanted the D.A. for the balance 75 per cent. only.

It is for each individual party to choose any of the aforesaid systems. Even so, it is very important to think of devising some sort of

credit, as the entire import business in Iran is done mainly on the credit system. Japan, for example, has an Association which regulates the credit system applicable to each country. Once this Association allows credit to a particular country, the names of the parties to whom the credit may be given are approved by it. When credit is given to such overseas approved Firms, the Japanese exporters and manufacturers can discount their credit bills with various Banks.

In case credit is to be extended by Indian Manufacturers or Exporters to Iran on the basis of either Documents against payment or Documents against Acceptance, they should ask for Bank Guarantee from the Importer. It may often be that the merchants may not be prepared to furnish such Bank Guarantees, though they are of good repute and have large turnovers. In cases where no Bank Guarantee is forthcoming, the Indian Exporter may have to resort to The Export Credit Guarantee Scheme, sponsored by our Government, which covers risks of export to a large extent. Details of the Scheme can be had from the Council Secretariat.

As regards the credit-worthiness of any Firm, reference could be made to a Firm called **Johanus Chit & Co.** which is working in collaboration with an important American Firm. This Firm, which collects all information about the Business Houses of Iran, was highly recommended to the Delegation by the Indian Embassy in Iran. Johanus Chit & Co. charges four types of fees for giving a Report as follows :

- Rs. 8/- for a broad outline of the Firm about which information is sought.
- Rs. 16/- for a broad outline with Financial status and credit-worthiness of the Firm.
- Rs. 75/-) for further details about Turnover, Financial status
to Rs. 120/-) etc. of a given firm.
- Rs. 200/- for the complete history, turnover, contacts and other information asked for of a given firm.

In the opinion of the Indian Embassy, the second type of Report for Rs. 16/- would be quite sufficient for the purposes of Indian Manufacturers.

For a list of Importers and Commission Agents **See Appendix "3"**.

Dress Habits and Consumer Preference

The dress habits of ladies and gents are of the Western type. Though in the cities, ladies are slowly giving up wearing **Burkhas**, yet in the interior Burkha is still worn, for which **crepe fabrics of black colour** are found to be very popular. Iranians like big designs. The designs should not be all over the fabric, but should be just enough to attract the eye. About 70 per cent. of their requirements are in printed goods. Spun rayon cloth is consumed to the same extent as filament rayon fabrics. In the cold season, deep coloured fabrics are consumed in quantity; for the rest of the year, the colours and designs preferred are according to Paris (French) or Western Style and choice.

In view of the durability of Cotton fabrics, the consumers prefer cotton fabrics to rayon fabrics. In cities, people prefer rayon and synthetic goods.

Varieties in Demand

The varieties being consumed at present, together with their respective international prices are as under :

Variety	Width	International C.I.F. Price per yard. (in U.S. cents)
Satins — 3200 ends	32"	15 cents
Satins — 3600 ends	36"	16½ "
Satins — 6000 ends	36"	24 "
Brocade Taffeta	27"	13 "
Triple Shear Machine Print	36"	*24 "
Habutae, Machine Printed	36"	20 to 21 "
Shioze embossed and hand printed	29"	16.70 "
— do —	33"	18.00 "
— do —	36"	18.70 "
Georgette Printed (Machine Print)	36"	18 to 22 "
		(depending upon Qty.)
Fujette Printed	29"	16.70 cents
— do —	33"	18.00 "
— do —	36"	18.70 "
Fujette Dyed	29"	11.70 "
— do —	33"	13.00 "
— do —	36"	13.70 "
Fancy Bush Shirting	36"	42 "

Variety	Width	International C.I.F. price per yard (in U.S. cents)
Muslin No. 9 (Dull staple x Dull staple) (imported in grey condition for process- ing in Iran, and also in resin finish)	36"	approx. 17 cents
Spun Rayon fancy suiting	52"	47 to 74 "
Black Crepe	44"	30 to 40 "
Nylon Taffetta Plain	36"	40 "
Nylon Taffetta Printed	36"	50 "
Nylon Satin	36"	53 "
Nylon Oriental Dyed	44"	55 "
Nylon Oriental Printed	44"	65 "
Spun Rayon Dyed Shirting (in 30 yards pieces)	35/36"	22 "
Satin — 6000 ends	54"	30 to 32 "
Half Crepe Printed	36"	20 "
Full Crepe Printed	36"	22 "
Fujette Printed and embossed	36"	24 "
Tusser Printed	36"	20 "
Tusser Plain	36"	20 "
Tusser Printed and embossed	36"	23 "
Spun Rayon mixed with Terylene Plain	36"	46 "
Act. Crepe Plain	36"	31 "
Act. Crepe Printed	36"	37 "
Furnishing cloth of heavy weight Ptd. on Jacquard design	—	—

(* This price is high, so imports are not made in large quantities.
There is a good demand around 20 cents).

Buying and Booking Season

There are two main business seasons. The first is the Summer season from March to August, during which fine fabrics, such as Nylon Crepes, etc., are in demand. The other is Winter season, from September to February. Competitors' representatives visit the places during October/November for booking orders for Summer requirements and during April/May for Winter requirements, in view of the long time the steamers take from Japan to reach the Iranian Port. On the occasion of the Muslim festival of **Id-e-Milad** also, there is a brisk demand for fabrics during January/February. The Indian exporters also would do well to cater for business in the months when competitors' representatives are there for booking orders.

Imports and Import Policy

Imports of rayon piecegoods into this country are approximately valued at Rs. 7 crores per year, out of which India's share in the year 1959 was only about Rs. 26 lakhs. The share of Japan was approximately Rs. 5 crores and of other countries like the U.S.A., the U.K., and Italy, Rs. 2 crores. The share of imports from the Communist countries is negligible.

(Detailed statistical information about imports during the last 3 years is given in Appendix "4A-4C").

The imports of spun rayon and of art silk fabrics, including nylon, are in the ratio of 1/3rd and 2/3rd respectively.

Spun rayon fabrics are in great demand. The local production of spun rayon fabrics is increasing rapidly. This is because the import duty is based on weight and it becomes more profitable to produce spun rayon fabrics than to import them. The main varieties of spun rayon fabrics are Muslin No. 1 and No. 9 which account for approximately Rs. 90 lakhs out of the total imports of spun rayon fabrics worth Rs. 1½ crores from Japan. Next comes suiting which is imported to the tune of approximately Rs. 30 to 40 lakhs. In filament fabrics, the main imports from Japan consist of various types of satins which is to the tune of approximately Rs. 90 lakhs. Next come, Viscose voile and cherry voile, imports of which approximate Rs. 40 lakhs, and Lining cloth imports of which are to the tune of approximately Rs. 10 lakhs. Another item is Fujette and Crepe, import of which is to the tune of approximately Rs. 28 lakhs.

(For break-up of Imports from India and Japan see Appendix "5A-5C").

In view of the various development projects undertaken by the Iranian Government, the country is experiencing shortage of foreign exchange. Since the middle of January 1960, imports into Iran are regulated by American Aid under the U.S.A. International Commercial Administration Regulations, and importers are required to obtain licence in Iran before placing orders with foreign suppliers. Permission to import goods from any country worth 5,000 U.S.A. Dollars is liberally given, but no repeat orders can be placed under these Regulations by the same importer on the same manufacturer. In brief, the manufacturer from any country can supply goods upto 5,000 U.S.A. Dollars to any

number of importers in Iran. We were given to understand that this scheme of controlled imports under American Aid would last only for a short time, may be for a couple of months or so. It is expected that, thereafter, licences to import from all countries would be given freely.

Customs Duty

Duty on imported rayon fabrics is charged as under, **on the basis of weight :**

Customs Duty @ 125 Rials per Kilo (2.2046 lbs.);
Monopoly Tax @ 50 Rials per Kilo;
Commercial Profit Tax @ 25 Rials per Kilo; and
Municipal Tax @ 1% on C.I.F. value of the goods.

Thus, the total tax burden is 200 Rials per kilo, plus 1 per cent. on the C.I.F. value of the goods imported.

No Commercial Profit Tax is, however, charged on grey goods. There is no Sales Tax and/or Excise Duty. Further, there is no preferential treatment given by Iran to any country in the matter of Customs Duty. The duty being on the basis of the weight of cloth, cloth with a lighter weight has to bear a relatively lower duty than cloth with a heavier weight.

Shipping

Ships from many parts of the world call at Khoramshahr, the main port of Iran. The British India Steam Navigation Co. Ltd., serves the Iranian ports. There are usually five sailings from Bombay to Khoramshahr during a month, and the time taken by the steamers to reach Khoramshahr is about 10 days. The freight charged by the Company at present is Rs. 79/- per ton of 40 C. Ft. (i.e. 4 to 5 cases, depending upon the size). Since the foreign suppliers quote on a C.I.F. basis, it is difficult to get a precise idea of the comparative freight. Roughly, however, the freight charges for shipments from other countries may be estimated at about Rs. 0.06 per yd. The steamers from Japan take about 1½ to 2 months to reach Khoramshahr.

Import Documents

The Iranian Customs Authorities require the following documents for release of goods :

- (i) Original copy of the commercial invoice, giving construction of fabrics and weight;

- (ii) Bill of Lading;
- (iii) Original copy of Insurance Policy; and
- (iv) Certificate of Origin of the goods.

There are no specific forms prescribed by the Government of Iran for the Invoice and also for the Certificate of Origin.

As the steamer arrives early and it takes a long time for the Bank to present the documents to the Importers, it is necessary that copies of non-negotiable documents be sent to the Importers direct by the first available Air Mail to enable them to prepare the Customs Papers.

Internal Production

The Textile Industry in Iran is next to the Oil Industry. Roughly 30,000 people are employed in Spinning and Weaving Mills. Another 100,000 people are employed in handloom weaving and as many more in cotton production. Cotton spinning and weaving, however, predominates, though spun rayon weaving is also done side by side in the Cotton Weaving Mills. More and more Cotton and Spun Rayon Weaving and Processing Units are coming up. It was reported to us that the total requirements of cotton cloth were in the vicinity of 300 million metres, out of which, till the end of last year, 180 million metres were locally produced and 120 million metres were imported. With the installation of new Cotton and Spun Rayon Weaving units, the production this year is anticipated to be approximately 250 million metres, so that only the remaining 50 million metres of cotton cloth may be allowed to be imported. Separate figures of production of Spun Rayon and Cotton cloth were not available. But, in view of further expansion programmes in hand, it is felt that the Spun Rayon fabrics production also will be undertaken more and more locally. The manufacture of rayon filament fabrics is not yet undertaken on any appreciable scale.

It was further reported that while 200 looms or so have been presently working on filament fabrics, there are plans to increase this number to 2500 looms. The installation of these 2500 looms for rayon and synthetics, however, is likely to take some time.

There is another Factory having an installed capacity of 70 velvet looms, out of which 40 looms have been working on cotton velvets and the remaining 30 looms are expected to go into production to manufacture Chiffon Velvet very soon.

There are also a few factories manufacturing Socks, Hosiery and Knitted fabrics. Imports of these are very limited.

Besides these, there are a number of small factories manufacturing pure silk fabrics in Iran. There are two State-owned factories, one at Chalus and the other at Reshat.

The import of pure silk is banned as a protective measure.

Foreign Trade

The following indicates the balance of trade position with India for the last three years : (The figures for the year 1959 are for the period January-November only).

	Year 1957 in lakhs	Year 1958 in lakhs	Year 1959 in lakhs
Total exports	Rs. 615	Rs. 584	Rs. 379
Total imports	Rs. 5,540	Rs. 3,307	Rs. 3,144
Balance (-)	Rs. 4,925	(-) Rs. 2,723	(-) Rs. 2,765

From the above figures, it will be observed that India has an unfavourable trade balance with Iran. This is due to the fact that we are importing a large quantity of oil. But for the imports of oil, the trade balance would not be adverse to us.

Among the main items imported from Iran into India are :

Mineral oil, Dried Fruits, Spices, Petroleum products, Gram, etc.

The exports from India to Iran include Tea, Cotton manufacture, Jute goods, spices, etc.

Complaints

Many of the importers and merchants contacted by the Delegation complained that supplies of Rayon fabrics from India were not satisfactory and the nature of these complaints was as follows:—

1. Goods are not supplied according to samples on the basis of which the business is booked.
2. There are many weaving defects. For nearly every length of 4-5 yards, there is some defect or the other, and this entails

payment of heavy compensation, the more so as the goods are sold on credit.

3. The pieces are in different lengths ranging from 15 to 20 yards a piece. The merchants require uniform lengths and a fixed number of pieces in each case.
4. The length of each piece must be stamped at the end of the piece, and **should not be written in pencil.**
5. The designs are not acceptable. **(Designs at distance seem to be preferred).**
6. Prices are higher.
7. Colour and finish of the fabrics are neither proper nor uniform.
8. Shipment samples are not forwarded in time.
9. Supplies sometimes are of a quality inferior to those contracted for.
10. Detailed packing particulars of cases are not generally given.
11. Quality claims are not settled early.
12. The fabric is packed in second hand (old) cases which do not stand the handling during transit, and are generally received at the port of destination in a broken condition resulting in pilferage and shortage.

The quality of wood used for these cases is so poor that it does not hold the nails firmly. In consequence, even cases containing 40 to 50 lbs. of weight (such as Nylon) are received in a broken condition.

The importers and merchants strongly urged that steps be taken immediately to impress upon the Indian shippers to improve these defects so as to enable them to push sales of Indian fabrics.

Publicity

The Council can do publicity through the Indian Display Centre, run by the Indian Embassy, which is fortunately situated at a very

important place. The Indian Rayon industry can benefit to a great extent by displaying its products here. Our Embassy has kindly agreed to arrange displays at regular intervals if samples are sent to them in proper length.

Individual parties may also advertise through the Press, Cinemas or Neon Signs, though the most economical way which would be highly appreciated by Iranian merchants would seem to be to send attractive calendars to these parties.

I R A Q

General

With the historic city of Baghdad as its capital for Government, industry, trade, commerce, banking and education alike, oil-rich Iraq is a country of 6½ million people. The population is predominantly Arab, who form 75 per cent. of the population. There are also the Kurdish 15 per cent., Iranian 3.75 per cent. and others 6.25 per cent. The languages spoken are Arabic and Kurdish, but English is understood by most of them. The important towns are Baghdad, Mosul and Basra, which is also the chief Port.

Topographically, the terrain is mountainous in the North-West, sandy desert to the West of the Euphrates with a broad fertile central valley between the well-known rivers of the Euphrates and the Tigris. The total area of the country is 171,599 sq. miles.

Economic Conditions

It is the main central valley that sustains the country's agriculture. Though agriculture provides the basic needs of the people and also plays an important role in exports, yet it is not the mainstay of the economy. Oil, the black gold, provides the bulk of the sinews for Iraq's economic development. Oil yields as much as 75 million I.D. (Iraqi Dinars) per annum. The Government has ambitious plans for economic development. There are today only a few industries, including cotton weaving, wool weaving and knitting and rayon weaving with powerlooms, which are worth mentioning. Hardly 200 looms are reported to be working on rayon.

With the Iraq Government encouraging indigenous industry and agriculture alike both agriculture and industry are bound to thrive. Better health and housing facilities, along with increasing economic prosperity, should bring about an increase in the level of standard of living. At the same time Iraq's population has been increasing rapidly. All these mean that the demand for consumer goods should increase manifold, which affords India ample opportunities for expanding her trade with Iraq.

Internal Means of Communication

Internal communications are well developed. Railways constitute the chief mode of transport and connect Basra with Baghdad and Mosul, Syria and Turkey. Road transport too is well developed with good buses and well paved roads. Rivercraft plies from Basra to Mosul via Baghdad in winter months when the water is deep. The transport from Basra, the chief port of the country, to Baghdad is mainly by motor trucks.

Banking

Banking in Iraq is well developed. The National Bank of Iraq, which is the Central Bank, controls the transactions of both Iraqi and Foreign Banks in the country, and issues the necessary permits for their establishments. The following are the commercial banks: (i) The Rafidain Bank, (ii) The Arab Bank, Ltd., (iii) The Eastern Bank Ltd., (iv) The Federal Bank of Lebanon, (v) The Ottoman Bank, (vi) The British Bank of the Middle East, (vii) The Commercial Bank of Iraq Ltd., and (viii) The National and Grindlays Bank Ltd.

Advances to traders, by way of mortgage or hypothecation of goods are not generally favoured by the banks, but loans are given on clean credit.

The Iraqi currency, consisting of Dinars and Fils, is a legal tender throughout Iraq. The Iraqi Dinar is on par with the Pound Sterling. It is divided into 1000 units, each unit being called Fils. Roughly 75 Fils are equal to one Indian Rupee.

The following are the charges for opening Letters of Credit:— Stamps etc. £ 1 per £ 1000 Plus 50 Fils. Bank Commission is 1/8 per cent. per month, postage—250 Fils, Foreign exchange form 250 Fils, and L/C opening charge—£ 1 per £ 1000. For an extension of Letter of Credit, 300 Fils have to be paid. If the Letter of Credit expires, a new one has to be opened after paying all the charges over again. Unless insurance is effected in Iraq, a Letter of Credit is not allowed to be opened. Interest at the rate of 5½ per cent. per annum is charged for the amount covered from the date of the Draft to the date of delivery of shipping documents. Whereas the Bank rate is 5½ per cent. per annum, the market rate varies between 9 and 12 per cent. per annum.

Market

The Offices of most of the Importers and Commission Agents are located at Sa, Aden Street, which is very near to all the markets, parti-

cularly the Textile Market. The entire cloth trade is concentrated here within a small radius. The Wholesale market is almost akin to the Mulji Jetha Market in Bombay.

Method of Business

The bulk of the trade is concentrated in the hands of Iraqi nationals. The Iraqis are well versed in modern business methods. The local trade is handled by wholesalers and retailers who transact business almost on similar lines as business men anywhere else. The international trade is handled mainly by the following categories of traders:—

- (i) Commission Agents, (ii) Commission Agents-cum-Importer.
- (iii) Importers and (iv) Importers-cum-Wholesalers.

It is essential to know how these trade agencies function to understand the business methods prevailing in Iraq.

1. **COMMISSION AGENTS**: The Iraqi Importers book their requirements mainly through the Commission Agents who have their offices in the local market. These Commission Agents are very important, as the business is mainly handled by them. They charge a commission upto 3 per cent. from the Exporters out of which they give 1 per cent. to the Brokers. In case there is no broker, this 1 per cent. is given to the Importers. Sometimes, the Commission Agents have to pay compensation to the Importers in advance, if the supplier fails to settle the claim in time. The Commission Agents send out orders or offers and also arrange for Letters of Credit. An Exporter or Manufacturer can appoint as many Commission Agents as he may like, because these Commission Agents do not insist on sole monopoly.

2. **COMMISSION AGENTS-CUM-IMPORTERS**: This type of traders do business in a double capacity. They book orders for others and also import goods on their own account.

3. **IMPORTERS**: The Importers keep themselves in touch with Wholesalers, Commission Agents and Retailers as well. They send their offers to overseas suppliers through Commission Agents. Before purchasing the goods, they consult the Brokers, the Wholesalers and the Retailers. Some Importers are also wholesalers.

(For a list of Wholesalers, Importers and Commission Agents, see Appendix "G")

Most of the Importers and Commission Agents are Iraqis and are members of the Baghdad Chamber of Commerce. By legislation, no Importer can get an import licence without being a member of any one of the Iraqi regional chambers. A person other than an Iraqi National desiring to engage himself in the import trade in his own name has to keep a deposit of £10,000 with the Chamber.

TERMS OF PAYMENT: Payment for imports is generally done by Letters of Credit for India as well as for other countries. It is possible that, in future, buyers may ask for documents against acceptance. In internal dealings, the Importer sells on credit to wholesalers for 60-120 days.

Dress Habits and Consumer Preference

About 75 per cent. of the women folk dress in Arab Muslim style, whereas the rest are gradually changing over to Western style. In the Muslim Style, ABBAS (Burkha) is in great vogue and about seven yards of cloth are used for making one ABBAS. The Abbas is made out of BLACK RAYON CREPE or Cheap Shioze or Taffeta with Crepe soft finish. A special type of Crepe is used for this garment. **(A sample of this cloth is kept in the Council's Office for the benefit of the interested manufacturers).** Some ladies put on frocks also. These are made either out of cotton or Rayon cloth, printed or plain.

The men wear mostly woollen suits in winter as well as in summer, so there is a good chance of selling **lining cloth** required for the woollen suits. Only shirts and trousers are used in summer. Shirts are mostly imported ready made. There are still a good number that use long Pahren and Pyjamas (the old Muslim dress).

Rayon fabrics are generally preferred to cotton textiles, because of the better fineness and eye-appeal of the former. The designs preferred are the brighter ones with a dyed dark background. The colours preferred are bright deep dark shades in winter and lighter shades in summer. However, black is very much in vogue specially for Abbas and for many other garments besides. According to the assessment of the Delegation, preference is 2/3 for Spun Rayon fabrics and 1/3 for Filament Rayon fabrics. The Spun Rayon cloth is mostly imported from Japan and Muslin No. 9 and 1 are very popular. In Spun Rayon, people prefer resin finish with print on. The demand for prints and plain cloth is assessed by the delegation as 60 and 40, respectively.

Varieties in Demand with Their International Prices

The following are the varieties in demand, and an idea of their respective international prices for the same is given against each:—

Variety SPUN.RAYON	Width	International C.I.F. Price per yard English £. Sh. d.
Fujette Plain	36"	10 to 11d.
Muslin No. 9 plain dyed	36"	11 to 12d.
Muslin No. 9 printed (resin finish)	36"	14 to 15d.
Muslin No. 9 printed and embossed	36"	15 to 16d.
Satin Lining	54"	29 to 30d.
Twill Lining Cotton or Staple back	54"	23 to 24d.
Crepe printed	36"	22 to 23d.
Crepe special for Abbas	—	—
Nylon Printed	44"	18 to 20d.
Hand oil Paint Nylon	44"	35 to 40d.
Satin 3600 threads	36"	12 to 13d.
Satin 6000 threads	36"	17 to 18d.
Satin 6000 threads Ptd.	36"	22 to 24d.
Nylon Brosso	36"	40 to 42d.
Nylon Brosso	44"	48 to 50d.
Palace Plain embossed	36"	15 to 16d.
Palace printed embossed	36"	19 to 20d.
American Taffeta	38"	24 to 25d.

In competition with Japan, the possibilities of exporting inferior quality velvets are also there.

Buying and Booking Seasons

The trade is carried out in two seasons, i.e. summer and winter. The buying season for summer is from May to August and, for winter, it is from December to March. At this time, the demand in the wholesale and the retail markets is brisk. However, to book orders for the summer season, the representatives of our competitors will be there in **November/December** and for securing business for the winter season in **March/April**. The Japanese exporters are there so early, because the shipping time involved is nearly a month and a half. To manufacture the goods, etc. in Japan, it takes another month and a half. It takes a further month and a half for effecting the delivery. As such, to cater for the buying season, they have to be there 3 to 4 months in

advance. The Indian Exporters would do well therefore, to see that they also cater to the needs of business at the same time as the competitors' representatives are there.

Imports and Import Policy

The import of Rayon piecegoods and other commodities is controlled by the Government and import licences are required for such imports. Licences are issued on the basis of past performance and the ceilings of individual importers are declared well in advance. While announcing the licensing policy, the Government naturally considers its foreign exchange position **Vis-a-Vis** the country from which imports are to be made, the countries with which imports are to be made, the countries with which Iraq has a favourable balance of trade and countries which have friendly relations with Iraq.

At present, the following procedure is adopted for giving licences to Importers. Based on the total imports in the past, a given quota is fixed for the Importers out of which he can import upto 50 per cent. maximum from Japan and the remaining 50 per cent. from any other country, except Syria, the imports from which have been recently banned. Licences for the entire quota are normally not issued at one time, they are invariably issued in parts. A ceiling is allocated to each Importer according to this quota entitlement for the whole year. However, the Importers can get their full import licences at one time if they so desire. In such cases, there is a restriction that, once the Importer has obtained the import licence, he must utilise it within one month in case of goods valued below 24 pence and within two months in case of goods valued above 24 pence per yard. So the importers do not opt for the whole licence at one time but prefer to take it piecemeal — once every month or in two months, in order that they can comfortably utilise their licences spread over a period. If the licences are not utilised in time, they lapse automatically.

The import policy in Iraq, in general falls under two categories. (1) "Unlimited Imports" and (2) "Limited Imports". Imports of Rayon fabrics come under the "Limited Imports" category. Even newcomers can import any item falling under the category of "Unlimited Imports" by obtaining a licence, but only those who have imported in the past are eligible to import items included in the "Limited Imports" category.

Total imports of Rayon fabrics by Iraq have been approximately to the tune of Rs. 7½ crores. Out of Rs. 7½ crores, Rs. 5 crores worth of

Rayon goods were supplied by Japan, Rs. 1 crore worth of goods by Syria, and Rs. 1½ crores worth of goods by various other countries, including India. India's share in 1959 was of the order of Rs. 46,000/- against Rs. 4,950/- only in 1958. This was due to the fact that Indian goods were not fully known in the Iraqi market. These import licences of Rs. 7½ crores comprise Spun and Filament Rayon only. For Synthetic fabrics, i.e. Nylons, etc., there is a separate import ceiling. This ceiling is £ 200,000 which works out approximately to Rs. 27 lakhs.

However, in the new policy which has been announced, the total ceiling has been fixed at six million Dinars i.e. approximately Rs. 8 crores for imports of rayon fabrics and at £ 200,000 for Nylon. A restriction has been put on the imports from Japan by which their imports shall not exceed 50 per cent. of the total imports of 1958, i.e. 50 per cent. of Rs. 7½ crores, while a complete ban has been put on the imports from Syria. It therefore becomes significant to study the new import policy.

Now the goods from Japan will be limited to the tune of only Rs. 3¾ crores, while none is being allowed from Syria as against Rs. 6 crores formerly of both the countries. As such a gap of Rs. 2¼ crores (Rs. 1¼ crores of Japan and Rs. 1 crore of Syria) would be created in the Iraqi Market. Since there is no restriction on imports from any other country except these two, it is felt by the Delegation that India can play an important role to share in this wide gap of Rs. 2¼ crores. However, to assess the gap correctly we have subdivided it in Spun Rayon fabrics and Filament and Synthetic Rayon fabrics. As stated above, the ratio of imports has been in the order of 2/3 and 1/3 for Spun Rayon and Filament and Synthetic fabrics respectively. As such the shortfall in spun rayon is likely to be in the order of 1½ crores and in Filament and Synthetic Filament fabrics in the order of Rs. 75 lakhs. In Spun Rayon, India is not yet manufacturing qualities in any appreciable quantity or of approved quality and as such this gap of Spun Rayon may be met either by exports from Communist countries or other Western countries, or it may be that cotton cloth may be bought instead of Spun Rayon, as Spun Rayon and cotton cloths are close rivals. It is possible that, now that the importers can book all their requirements of Spun Rayon from Japan, their requirements of Filament Rayon will have to be met by India or other countries. However, the gap of Rs. 75 lakhs for Filament and Synthetic fabrics is quite a wide gap and India is already producing qualities made out of the Filament and Synthetics which are in vogue in the Iraqi market. As such, a fair share for India in the Iraqi market, cannot be ruled out in the coming year

In Nylons, for which there is a separate ceiling of Rs. 27 lakhs, Indian Nylons 44" in plain and with prints, vat and flock in 44" and 36" width are getting very popular. It is very likely that the imports of Glass Nylon alone may increase on a fairly large scale and, for this reason we had impressed upon the Government authorities in Iraq that the ceiling of Rs. 27 lakhs for Nylon should be raised to a higher figure. The Iraqi Government authorities have assured us that, in case the traders ask for higher licences for Nylon and if there is a demand, they will not hesitate to increase the ceiling to a higher figure and to see that imports of Nylons from India are not restricted. The average price of imported Art Silk fabrics comes to about Rs. 1-6-0 per yard c.i.f. which, in terms of yardage, comes to approximately 4½ crores yards.

The licences for Japan are quoted at a premium of 7 to 10 per cent. as there is a restriction on imports from this country. The significance of this point is that the prices obtained in this market would be comparatively better, as a general shortfall is likely to be created thereby resulting in more demand and also a rise in prices for fabrics imported from other countries.

At present, India has a Trade Agreement with Iraq, whereby the Iraqi Government issues licences for imports from India without any restrictions such as applicable to Japan. Further, the Government and the public of Iraq are well disposed towards Indian imports, because of the most friendly relations prevailing between India and Iraq. There is a goodwill towards India in Iraq.

(For detailed statistics regarding imports, see Appendix "7A-7D")

Customs Duty

The Iraqi Government levies an import duty on the weight of the fabrics i.e. per kilo (2.2046 lbs.). There are no internal trade taxes, such as sales tax, excise duty, etc. There is no preferential duty either. **(See Appendix No. 8 for details of import duty).**

Here it may be pointed out that though the duty is levied on weight, the duty reduces as the weight of the cloth goes up and as such, to some extent, the higher duty on weight is neutralised and the cloth with heavier weight is not placed at too much disadvantage as against the lighter weight cloth.

Shipping

Iraq's imports and exports are mainly handled by foreign ships. There are warehousing facilities at Basra, which is the main port.

The steamers from Bombay, which regularly ply between Bombay and the Persian Gulf Ports, take about 10 days to reach Basra, and the freight charged on Rayon fabrics packed in cases is Rs. 85/- per ton of 40 c. ft. (i.e. 4-5 cases depending on size). The average freight per yard comes to approximately Re. 0.03 nP. per yard. The shipping time from Japan is nearly a month and a half, while the freight rate from there is approximately Re. 0.06 nP. per yard.

Import Documents

The following documents are required for clearing the goods from the Customs :—

- (i) Commercial Invoice showing value of the goods and Gross and Nett weight thereof, with a detailed packing list.
- (ii) Bill of Lading.

Since insurance is covered in Iraq, it is imperative that intimation about shipment be sent to the buyers in advance, i.e. as soon as the goods are carted to the docks.

Internal Production

As mentioned earlier, the local production is almost nil. Till local production increases, Iraq will have to import to meet nearly all her requirements of Rayon fabrics. The only rival product, viz. cotton textiles, is also not produced in sufficient quantity. The tastes of the people are slowly changing towards cotton finished goods. To meet this new challenge, the rayon manufacturer should strive for a finish and texture parallel to those of cotton piecegoods. And this can be done only by producing Spun Rayon goods.

Foreign Trade

Total exports from Iraq amount to 10 million I.D., excluding oil, and her imports to about 11 million I.D. The principal imports are cotton piecegoods, art silk piecegoods, sugar, tea, coffee, automobiles, cycles and cycle parts, electrical goods, etc. The principal exporting countries to Iraq are the U.K., the U.S.A., Germany, Japan, Ceylon, India, Belgium, Holland and Italy. Tea, cotton textiles, hosiery, etc. are the major exports from India.

The overall trade position with regard to exports and imports between India and Iraq during the last three years is as under

	(Rupees in Lakhs) (Jan./Nov.)		
	1957	1958	1959
Total exports from India	286	148	255
Total imports into India	231	214	162
Balance :	+ 55	- 66	+ 93

Complaints

When the delegation met the Importers and Merchants at the office of the Baghdad Chamber of Commerce, there was severe criticism about packing, etc. of Indian Art Silk Fabrics, as well as of the specifications of cloth, designs and samples. The Indian Manufacturer does not manufacture to fulfil the demands of the Iraqi consumer, as he is ignorant of the tastes of the Iraqi consumers. As a result, in some cases, actual shipments vary from the samples which have been the basis of business. Pieces of uneven lengths are packed in cases. It was suggested that, as far as possible, pieces of uniform length should be supplied. The wooden cases in which the goods are packed break in transit and, very often, the goods are also pilfered.

The wrapping of the pieces is not at all attractive. It was suggested that the pieces should be wrapped the way the Japanese suppliers do and also that samples be sent in longer lengths than what presently being done. The presentation of the sample which is very important for sale is anything but attractive and needs looking into.

Complaints from importers are not properly attended to. The Manufacturer takes an unduly long time to send replies. The merchants insisted that their claims be settled immediately and, for this purpose, they suggested the keeping of an authorised representative of the Council or the Industry either to settle the claim on the spot or to contact the manufacturer with a view to ensuring immediate settlement. This aspect was discussed at a meeting of the Baghdad Chamber of Commerce and the Delegation assured those present that it would endeavour its best to find out a suitable way to hasten the settlement of these claims in future.

Another complaint is that the Indian Manufacturers do not make shipments within the contract period and often ask for extension of Letters of Credit. The importers have many reasons to insist that ship-

ments are made in time and no extensions are asked for. They have to undergo much routine work with their Bankers to extend the Letters of Credit. The amendment and or extension charges of Letters of Credit are very high and the importers do not want to incur such expenses unnecessarily. The buyers lose the profit of the whole season, if the goods are not shipped within time. Further, they will have to stock the goods if they arrive after delivery time and also pay a high rate of interest. Even the shipment samples are not sent in time.

Publicity

There is one aspect of marketing which has to be fully exploited, and that is advertising. Advertising can be carried out by taking space in newspapers, displaying cinema slides and sending calendars. The merchants of Iraq are particularly fond of displaying calendars. But the best advertisement, the Delegation repeats is the man on the spot—the representative of the Indian Manufacturer, who goes round selling the goods of his principals and paying proper attention to the complaints of the Importers and the Merchants.

The Government of India is very shortly opening its own Display Centre in Baghdad. The Embassy has assured the Delegation that it will be prepared to display rayon cloth for the benefit of the Industry. It is suggested that our rayon Industry should take the maximum advantage of this offer by displaying samples in larger lengths at the Display Centre which is most prominently situated.

The question of opening an office or appointing a representative in Iraq brooks no delay. It would be very useful to get all the information from, and cater to the Middle East markets. Iraq would be the proper place for this as it is a very important market by itself in the whole of the Middle East. There may be some visa and Passport difficulties for the representatives to move about the Persian Gulf and other Arabic countries, but these difficulties could be greatly overcome by observing certain extra necessary formalities.

PART II

LEBANON

General

Situated on the eastern side of the Mediterranean, Lebanon is an Arab-Asian country. A Republic of only 4015 sq. miles, it has a small population of 15 lakhs comprising Arabs, Armenians and Circassian Turks. Arabic and French are the languages spoken.

Economic Conditions

The **per capita** income of Lebanon is about \$300.00 a year. It is estimated that about 45 per cent. of the population derive their income directly or indirectly from agriculture. Lebanon produces tobacco, olives, grapes and other fruits, and wheat. The size of the country restricts the market and as such the prospects for industrialisation are not bright. Even many of the industries already established operate with excess capacity and face great competition from foreign products. Silk manufacturing is confined mainly to meet local consumption. **The silk industry is important in Beirut and Tripoli.** Tobacco manufacturing is a Government monopoly. An oil refinery was opened at Tripoli in 1950 and is being currently expanded.

The principal cities are Beirut, which is the capital of Lebanon, and also a port and a Summer resort, and Tripoli, terminus of the oil pipe line. Sidon is another small port.

There are no restrictions on Foreign Exchange. The Royalty for the pipe line is approx. 3 million dollars a year, which is the most important source of revenue.

Internal Means of Communication

Lebanon has one railway which connects Beirut with Tripoli and extends through Syria to Hama, Hamar and Aleppo. Another railway connects Beirut with Sidon and Nakome in the South, while the third connects Beirut with Damascus in Syria. Most of the Internal transport is, however, by trucks. Adequate and good roads connect all important cities and towns of Lebanon.

Besides a small Lebanese fleet, foreign ships handle the exports and imports. Lebanon has a good port in Beirut which has all the facilities. Indeed, it is considered to be one of the best ports with adequate warehousing handling and storage facilities, the port is able to accommodate a substantially increased volume of trade. The port of Beirut has a free zone where imported goods can be stored and processed without being subject to customs duties. Warehousing facilities can be availed of through the port authorities.

Banking

There are four important banks doing business in Lebanon, *viz.* The Bank of Lebanon, The Ottoman Bank, The National & Grindlays Bank Ltd., and The Barclays Bank D.C.O. The local currency is Lebanese Pound which is equal to approx. Rs. 1.50 and is divided into 100 Piastres.

Market

There is no central place for the trade. It is scattered in different places.

Method of Business

The trade is handled by Commission Agents, Importers, Wholesalers and Retailers, as in Ethiopia.

Goods are imported from India as well as foreign countries on Letters of Credit terms. The credit in the internal market extends upto one month.

There are two Chambers of Commerce in Lebanon; one in Beirut known as "Chamber of Commerce and Industry" at Rue Allenby and the other at Tripoli, known as "Tripoli Chamber of Commerce and Industry."

The Chamber of Commerce and Industry at Beirut has 2 types of members. These members are classified as Class I and Class II according to their financial status. Class I means member of the status of $\frac{1}{2}$ to 1 million Lebanese pounds capital, whereas Class II means a member of the status of $\frac{1}{4}$ to $\frac{1}{2}$ million Lebanese pounds capital. **(For a list of names and addresses of Commission Agents and Importers of fabricated Rayon in Beirut, see Appendix "9").**

The Chamber of Commerce and Industry in Beirut is a powerful body and carries a good name.

Dress Habits and Consumer Preference

The people in Lebanon use Western style dress since Lebanon was originally a French territory. French fashions are still in vogue. The Lebanese have no particular local preferences. Their demand is almost completely conditioned by new fashions and preferences which are designed by Europeans, particularly French fashion makers. Beirut, the main market for Lebanon, is a market for quality goods only if they are novelties. The consumers are prepared to pay high prices for quality goods. To enter the Lebanon market, therefore, we have to produce defectless cloth of American or French standards with their novel designs. Mostly printed cloth is sold. This is especially so in Beirut. Due to restriction on imports from France on Rayon and Velvet there is good scope for Velvet in the Lebanon market. As the Lebanese use very superior cotton material, only superior rayon and synthetic fabrics with novel designs of very high quality are liked. Pure silk is also used to some extent as Beirut is a Holiday resort of the Middle East.

Varieties in Demand

The following are the popular varieties in demand :—

	Width.
Nylon Satin Printed	36"
Nylon Taffeta Printed	36"
Pure silk georgette	44"
Pure silk chiffon	44"
Pure silk printed sarees	44"
Pure silk coating in	29" and 36"
Pure silk shirting in	29" and 36"
Pure silk brocade	36" and 44"
Jari Brocade	36"
Nylon georgette Printed	44"
Nylon Georgette Plain	44"

Buying and Booking Seasons

There are two buying seasons during which orders are booked with the manufacturers. For the winter season, which lasts from July to October, orders should be booked between February and March, whereas for the summer season, which lasts from April to June, orders should be booked between October and December.

Imports and Import Policy

The main imports of Art silk fabrics are from France, U.S.A., Italy and Japan. The total imports during the years 1957 and 1958 are as under :—

Year	Quantity (Weight) Kilo	Value in Lebanese £.
1957	2,626,783	10,920,949
1958	1,479,580	7,810,434

The total exports from India were Rs. 81,000/- in 1959. Out of this 90 per cent. was Glass Nylon which is fast disappearing now.

Imports of Textile products are free from any import restrictions. However, imports of Women's readymade Dress and of silk threads are subject to the requirement of a prior import Licence. Similarly, prior licences are required for import of furniture and rubber. The imported products are free from any type of domestic tax. Lebanon has Trade Agreements with the following countries :

Argentine	Rumania
Brazil	Saudi Arabia
Bulgaria	Syria
Red China	France
Czechoslovakia	Germany (E. & W.)
Egypt	Iraq
Italy	Turkey
Jordon	Yugoslavia and
Poland.	U.S.S.R.

Trade in Silk and Art Silk items is effected by the Inter-Arab Trade Agreement which stipulates that products of member countries whose 50 per cent. of the cost is local cost will be accorded preferential treatment.

(The countrywise figures of imports are given in Appendix "10").

(The qualitywise break up of imports may be seen in Appendix "11A to 11C").

Customs Duty

Customs Tariff on Silk and Art Silk products is about 25 per cent. **ad valorem** generally; they may, however, be subjected to a maximum

duty amounting to twice the value of the normal duty, depending on the country of origin. This higher duty applies at present only to Japanese products. In addition to the customs duty, there is a Municipal Tax of 3 per cent. *ad valorem* payable by the importers. Preferential treatment is accorded only to products of Arab countries which are members of the Inter-Arab Trade Agreement. The rate of tariff on the products in question is about 10 per cent.

Shipping

There is only one sailing for every 4 to 6 weeks between Bombay and Beirut which is not enough. There should be at least two Steamers per month. The time taken by Steamers from Bombay to Beirut is about a month. The general cargo rate is shillings 283 per ton of 40 c. ft., whereas the rate of freight from Bombay to London is shillings 293 per ton. Thus, the freight rates from Bombay to Beirut is less only Sh. 10/- when compared to the freight rates from Bombay to London.

Import Documents

The following documents are required for clearing the imported goods :

(1) Four copies of Commercial Invoices giving full particulars of the goods, with specifications and weight of each case to be certified by any recognised Chamber of Commerce. If there should be a Lebanese Consulate at the port of shipment, the Invoice should be certified by this Office.

(2) Bill of Lading.

(3) Insurance Policy.

Internal Production

There are no Art Silk weaving mills in Lebanon. The silk industry is also not significant. The silk industry was relatively prosperous and was a good source of income prior to 1920. Under the pressure of foreign competition, mainly from Japan, the economic condition of the local silk industry deteriorated and the industry has been reduced to insignificance. Some official efforts to encourage this industry were made in the year 1955 with little encouraging results. There is even now a Government Silk Office, the purpose of which is to foster silk production, but the feeling is that the operation of this office has not been significantly beneficial.

The Lebanese cotton spun rayon textile industry is fairly well established. In general, it produces for the middle and lower class consumers. The upper class consumer largely depends on imported products.

The Cotton & Spun Rayon Industry caters to a large part of local consumption and is operating with excess capacity. A part of the domestic production is marketed abroad, mainly to Arab markets. The country, however, imports a substantial quantity of superior textiles every year. The reason is that the local consumer has, for economic and social reasons, some preference for the foreign product.

Foreign Trade

Main imports into Lebanon are :

Textiles, Sheep, Dairy, Grains, Wheat flour, Petroleum Products, Gold and Gold Products, Motor Vehicles, Machinery, Drugs, Cotton, etc.

Main Exports from Lebanon are :

Segume, Apples, citrus fruits, Banana, Tobacco, Cotton Textiles, Gold and Cement.

Complaints

Complaints about Indian goods reported here were similar as in other countries which have been fully discussed under General Observations.

Publicity

The Press and Neon signs, which are very much in vogue, should be used for purposes of advertisement. Shortly an Indian Display Centre will be opened. Such centres at other important places also may help boost our exports.

S U D A N

General and Economic Conditions

Of the several countries of resurgent Africa, Sudan is the only country which can boast of as large an area as 967,500 sq. miles—about one-fourth of the size of Europe. Located a few degrees above the Equator in latitude, it has tropical climate in the South and sandy desert in the North. It is the only country where the fertile middle and southern regions are watered by both the Blue and the White Niles. This valley has for centuries been a rich cotton tract which produces the country's main foreign exchange earner. Other crops which are cultivated are groundnuts, gum arabic, pulses, sesame, etc. Among minerals, manganese and, to a small extent, gold, are the main items. By and large, the country is mainly agricultural. Only since recently attention is being paid to industrialisation.

The total population of 12 million consists mainly of Muslims. The other important groups are Pagas, Christians and Asians. English and Arabic are the main languages spoken. Niltic and Negro dialects are in vogue in the different tribal areas. The most important towns are Omdurman (the commercial centre), Khartoum (the Capital), Port Sudan (the sea port), Kassala, El Obeid, Wad Medani, Gadaref, Juba, Wadi Halfa, Malakaa, El Fasher, Kosti, Tokar and Atbara.

Internal Means of Communication

Though communications are not well developed, banking conditions which are an essential pre-requisite for commercial transactions are quite well developed. Only a few towns are linked by railroads. A North-South line from Wadi Halfa to Juba exists, but there is no rail link beyond. Other means of communications are trucks which operate on desert tracks established by caravan routes, because there are no metalled roads. Between Wadi Halfa and Khartoum cataracts hinder navigation except for short distances. The roads in the Southern provinces are better than in the North.

Banking

The leading banks in Sudan are :—

- 1) The Barclays Bank, DCO

- 2) The Ottoman Bank
- 3) The Credit Lyonnais
- 4) The Banque Misr
- 5) The Arab Bank Ltd.

The currency of the country, the Sudanese Pound, is considered quite stable. The commercial rate of exchange between India and Sudan is Rs. 100/- = Sudanese £. 7.350. The Sudanese Pound is divided into 100 Piastres and each Piastre is equal to 10 milliems. So, each Sudan Pound consists of 1,000 milliems. Generally, the banks give overdraft facilities to reputed clients.

Under the instructions from the Ministry of Finance, importers have to deposit in the banks, 40 per cent. of the amount for opening Letters of Credit. This is intended to serve as a measure of credit squeeze to check overtrading. The opening charges for a Letter of Credit come to about 3/4 per cent. besides 1/4 per cent. as the Bank's collection charges. Thus, the total charges for opening Letters of Credit, valid for three months come to 1 per cent. For any extension of the Letters of Credit up to a further three months, the merchants have to pay the same charges. As these charges add to the cost of the material, and consequently bring down the margin of profits, the importers are reluctant to open Letters of Credit. Some of them, however, are prepared to do business on D.P. terms, and thus avoid the intermediacy of the commission agents.

Market

The offices of the importers as well as the wholesalers are located at one place called "BAZAR" at Omdurman, and the retailers are spread all over at Omdurman and Khartoum which are the retail centres.

Method of Business

The imports of textiles are mainly controlled by Indian nationals. There are among these about 15 big importers with an experience of over 30 years in import trade, who import textile fabrics not only from India but from all over the world. The wholesale trade is also mostly in the hands of Indian merchants. They purchase their requirements from the importers and supply in smaller quantities to the retail traders. Quite a few Indians are in the retail trade. **For a list of important importers and merchants of textile fabrics, see Appendix '12'.**

There are three categories of traders, viz.,

- i) Importers,
- ii) Wholesalers and
- iii) Retailers.

Most of the big importers have either their associate concerns in Bombay or have arrangements with Commission Agents in Bombay, with whom they place orders for their requirements.

With reference to the terms of payment, most of our competitors are doing business on Letter of Credit terms. Business for Indian goods is, however, done on D.A. terms. The Importers' Associates in Bombay or their Commission Agents have to make payment to the Indian Manufacturers against shipping documents and then they draw on the Importers 90 days after sight Hundies. In certain cases, credit facilities are given even for a longer period. The Importers have to give to the wholesalers credit facilities of about 2 to 3 months and so also the wholesalers to retailers.

Next to Indians in the textile trade, come the Sudanese. These traders generally open Letters of Credit for rayon goods.

Dress Habits and Consumer Preference

An analysis of the dress habits of the people of this country shows that most of the Sudanese men wear a long gown reaching up to their feet. This dress which is called "JALABIA" is made of white cotton long cloth or sheeting. Below "JALABIA", the Sudanese wear long shirt and short pyjamas, which too are made of cotton. Since "JALABIA" is made of cotton long cloth or grey sheeting, some grey or bleached Spun Rayon fabric can be introduced to bring about a change in the consumer's taste from cotton to rayon. If we succeed in this, consumption of Spun Rayon fabrics can be increased, as it takes about 7 to 8 yards per piece of a garment that is very largely used. The head dress—turban—is of white cotton or rayon or voils.

The ladies wear a long skirt and an underwear. Over the skirt, they wrap sarees of 9 yards made of two pieces of black voile. Some ladies are now changing over to Western style of dressing. Dark shades are preferred. Light shades go only with varieties like Full Crepe and Half Crepe, the price of which may be above one rupee. Flowery prints are liked, more especially in cheaper varieties. In superior varieties, oriental designs are preferred.

Varieties in Demand

So far as the type of cloth in demand goes, the following are the varieties in demand, and their prices are indicated against each item :

Variety	Width	International
		CIF Price per yd. English £ s. d.
Plain dyed Muslin No. 9	36"	11 to 12 d.
Plain dyed Muslin No. 1	29"	8.5 d.
Printed Muslin No. 9	36"	13 to 14 d.
Half Crepe Printed	27"	15 d.
Half Crepe Printed	32"	17 d.
Half Crepe Printed	36"	18 d.
Half Crepe Plain Dyed	26"	10 d.
Half Crepe Plain Dyed	32"	12 d.
Half Crepe Plain Dyed	36"	14 d.
Tafetta Black Sheoze	36"	12 d.
Tafetta Printed Sheoze	36"	17 d.
Fujette Printed	36"	16 d.
Fujette Plain Dyed	36"	13 d.
Tafetta Acetate (Egypt) Printed	36"	29 d.
Cherry Voile Printed	36"	11 d.
Bemfanny Printed	36"	11 d.

The popular width is 29" or 32". 36' width is also accepted if the price difference is less than proportionate to the bigger width. Very little of 40", 45" and 48" are in demand except in the case of Sarees.

For the Sarees, a length of nine yards is required. The ladies generally break up the saree to 4½-yard lengths and use both the lengths of 4½ yards each for wrapping over their body. Split borders are not at all liked as the cloth with such borders appears to be torn on the sides. The goods in great demand are of Spun Rayon as they are cheaper in price. Muslin No. 1 and 9 are the most popular.

Buying and Booking Season

The marketing season is an important factor to be kept in view for booking orders in time. The season for sale in the local market lasts from October to May, which coincides with the marketing season of Sudan's agricultural products. The importers book the goods, keeping in view the delivery period, as also the time taken by the steamers. Our competitors are in the market during June-July, for booking for September-October shipments. This is because, about 1½ to 2 months are required for preparing the materials and, further, about 1½ to 2 months are taken by the steamers to reach Port Sudan. In the case of

Egypt and India, the importers book business at the same time, even though the steamers take only about 10-12 days.

Imports and Import Policy

The Government controls imports in various ways. First, the issue of import permits is at the discretion of the Government. Secondly, every importer of a commodity under the O.G.L. is required to register with the Government department concerned, the details about the quantity and the value of the commodity required to be imported. Such registration must be prior to entering into firm contract with foreign suppliers and in the prescribed form. Otherwise, the Customs authorities will not allow clearance. Thirdly, the Government reserves the right to fix the maximum profit at all stages of trade from the importers to the retailers. The importers, wholesalers, and retailers cannot charge a profit of more than 15 per cent.; 5 per cent. and 15 per cent., respectively—the importers to calculate this on the landed cost prices and the whole-salers and the retailers on their cost prices. If any class of trader is unable to make the profit as fixed by the Government, the next class of traders cannot take advantage of the shortfall in the margin of profit of his predecessor. The whole idea of the scheme is that the consumer should get the commodities at reasonable prices, making due allowances for the margins at the various levels of trade channels from importers to the retailers. The Sudanese Government is also keeping a close check by examining the books of account of the traders from time to time.

The issue of import permits also depends on market conditions. It may be mentioned that the Government allows hardly 10 to 15 per cent. of the amount applied for. (The issue of import permits of rayon goods on the past performance basis and the fixation of a ceiling for same were discontinued on the 24th September, 1959.)

At present, import permits are issued more to the Sudanese and, on a smaller ratio, to other nationals and that also after going through many formalities. The Indian merchants in Sudan are required to produce a proforma invoice, etc. and yet they are not given permits for the full amount applied, but only for a limited amount, while a Sudanese national gets the licence he wants very quickly and for any substantial amount, with much less formalities. This is apparently done with a view to encouraging the Sudanese merchants. Fixation of ceiling for import permit purposes, and allowing imports on the past performance basis would have come in the way of the Sudanese merchants, whose

past performances have been practically nil or very small. Furthermore, a Sudanese merchant is not required to submit a proforma invoice to the Government at the time of applying for an import permit. The only restriction is that the goods required for import should be below the value of 35d. per yard. The import permits are normally valid for a period of three to six months and are extended.

At the time of the visit of our Delegation, import permits applications for Rayon fabrics were not being considered at all, as the Government's concern was that there was excess stock in the market.

As the main traders in textiles are Indians, and as the licences issued to them are for small amounts, the Indian importers have to finance the import against the permits issued to the Sudanese merchants. On application, the Government permits the permit-holder to change the country of supply, if so desired. The application for imports from Communist countries like China, Poland, Yugoslavia, etc. are considered on the same lines as the applications for imports from India.

The permits which hold good for imports of Rayon or Spun Rayon fabrics are not valid for imports of Synthetic Fibre fabrics. The Sudanese Government somehow carries the impression that imports of Synthetic fabrics would come in the way of consumption of cotton fabrics and thereby affect the economy of that country adversely. The Delegation tried to explain to the Minister for Commerce and Industry that Nylon fabrics would not necessarily reduce or even substitute consumption of cotton cloth. But the Government were not in favour of relaxing rules for imports of Nylons. Import permits for Nylon fabrics are issued very rarely and that too for a small value i.e., below £1,000/-. For importing fabrics costing more than 35d. per yard, the importers have to obtain special permits which are issued very rarely. This restriction in price is irrespective of the width of the cloth.

Imports of Art Silk fabrics, including Spun Rayon fabrics during the year 1958 were approximately of the value of Rs. 70,00,000, whereas, during the year 1959, they were valued at approximately Rs. 120,00,000.

(Countrywise imports for the years 1958 and 1959 are given in Appendix "13A-13C".)

Imports of Art Silk fabrics, including Spun Rayon fabrics from Japan, have been restricted since April, 1958. The imports from Japan during the year 1958 constituted the highest percentage of imports from

any single source, being 60 per cent. of the total imports. However, in the year 1959, imports from Japan declined sharply. This was due to the fact that the Government of Sudan was not freely issuing permits for imports from Japan, because Japan had not bought Sudanese cotton, which is the main item of Sudan's exports. Notwithstanding the restrictions on imports from Japan there has been no shortfall in imports of Rayon fabrics, due to the fact that Egypt has since taken the place of Japan, while Hungary and Poland have increased their Rayon exports to Sudan. India's share in the total imports of art silk fabrics, including Spun Rayon fabrics, during the year 1959 was only Rs. 14,00,000/-, which comes to about 11 per cent. of the total imports. Separate figures of Spun Rayon and Art Silk fabrics are not available. But, judging from the demand, we can safely say that imports of Spun Rayon fabrics were in the vicinity of about 60 per cent. of the total imports of Rayon fabrics. The imports consist mainly of cheaper varieties. Though people are getting quality conscious of late, they are still, by and large, more price conscious.

(For further details of qualitywise imports including from India, see Appendix "14".)

Customs Duty

At present, the import duty levied on all sorts of Silk and Rayon piecegoods is 50 per cent. **Ad Valorem**. On goods from Egypt, a duty of 30 per cent. **Ad Valorem** has been levied recently. Despite the relatively higher duty, Indian fabrics have proved competitive **vis-a-vis** Egyptian goods. There are no internal taxes, such as sales tax, excise duty, etc.

(For a list of Import Duties, see Appendix "15".)

Shipping

Port Sudan has an excellent harbour and also upto-date warehousing facilities in the form of a warehouse of about 2,000 square metres in size with the latest sprinklers and other devices. Vessels of many shipping companies touch Port Sudan. Between Sudan and India, the following Steamship companies ply their steamers :

Moghul Lines
British India Steam Navigation Co. Ltd.,
Khadiv Mail Lines
Scindia Steam Navigation Co. Ltd.,
The India Steamship Co. Ltd.,

The time taken by the Indian steamers to reach Sudan is not long and the freight rates too are not high, compared to other countries. The time taken for steamers to arrive from Bombay to Port Sudan is about 12 days, whereas, in the case of other countries, it takes much longer. The approximate time taken by steamers from different countries is given below :—

Egypt	—	12 days
Germany	—	30 days
China	—	70 days
Poland	—	35 days
Japan	—	70 days

Since the prices quoted by the above countries are on a C. I. F. basis, it has not been possible precisely to ascertain their freight rates. The freight rate from Bombay to Port Sudan is Rs. 79/- per ton of 40 cft.

Besides, Sudan is served by several reputed Airlines.

Import Documents

The formalities to be observed for import purposes are not very complicated. The usual trading practices prevail in Sudan also. Shipping documents like Commercial Invoice, Bill of Lading, etc. are the essential ingredients of trade everywhere. Six copies of Invoices and four copies of shipping documents (two non-negotiable copies) are required to be submitted. There is no specially prescribed invoice form. An invoice should be framed giving full details of the fabric and packing, the gross and nett weight of the case, together with its contents and the country of origin.

Internal Production

At present, there is no Art Silk industry in Sudan, and the Government has no plans to allow installation of this industry in the near future. However, licences for installation of four big cotton mills in collaboration with foreign nationals have been issued. Production from these units is expected to come into the market in about two years.

In the year 1958-1959, Sudan entered into a number of barter deals with various countries. Out of them, specific mention was made to us of the import of Silk piecegoods worth £500,000 from China and services and goods, including Art Silk piecegoods worth £3 million from Egypt. These trade agreements have since expired, and Sudan has

entered into a fresh trade agreement with the United Arab Republic (Egypt) by virtue of which she is to import textiles, including Silk and Rayon piecegoods, worth Sudanese £35,00,000.

Negotiations have also been going on with Japan for a barter deal for Sudanese £20 million, by virtue of which Japan will have to purchase Sudanese cotton and other agricultural products of the above value and, in return, Sudan also will import various consumer articles capital goods, and Rayon fabrics, etc. from Japan.

Foreign Trade

Sudan has lately developed its foreign trade considerably, though all its trade is handled by foreign shippers. Sudan exports cotton, gum arabic, groundnuts, sesame, cotton seeds, hides and skins, etc., and imports cotton piecegoods, base metal, petroleum products, sugar, tea, coffee, Rayon textiles, jute sacks, etc. (See Appendix 16). The following table shows the balance of trade position between India and Sudan over the past three years.

	Year 1957	1958	1959
	(Jan.-Sept.)		
	Rupees in lakhs		
Total exports from India	977	716	694
Total imports into India	780	749	832
Balance	+ 197	- 33	- 138

Complaints

Indian businessmen, it is often complained by the Sudanese, never supply goods according to the sample on the basis of which the orders are placed, and to add insult to injury, they send both the samples and the goods in a poorly packed state. The wooden cases used are not seaworthy. So they break in transit and the goods get damaged and/or pilfered. Finishing and stamping by India are not comparable to those of other countries. There are many weaving defects in the cloth — at least one defect for every 4-5 yards. In every case, there are at least 25 per cent. defective pieces. The pieces are of varying lengths anywhere from 15 to 25 yards. The Sudanese merchants prefer, uniform lengths and fixed number of pieces in every case. The pieces are not properly stamped. Pieces far inferior in quality to those contracted for are supplied. In spite of Indian goods being competitive from the point of view of prices

generally, it is alleged, the above factors, make contracts with Indian manufacturers risky. The existence of a single Chamber of Commerce (The Sudan Chamber of Commerce — Address Post Box No. 81 Khartoum) should make it easier to settle claims and attend to the grievances of the Sudanese merchants who are all members of the Chamber. The Chamber itself takes interest in cotton and piecegoods.

Publicity

For propaganda and publicity also, the cinema and the press, both English and vernacular, are available. There is one English newspaper, three Arabic newspapers, and a handful of weeklies. The charges for advertisements are moderate. Proper publicity should help us gradually to persuade the Sudanese consumer to switch over from Cotton to Rayon textiles.

BRITISH EAST AFRICA

General.

The Crown Colony of Kenya, the Mandated Territories of Tanganyika and the Protectorate of Uganda together form what is known as "British East Africa", which has a population of 21 million sparsely dispersed over the sprawling territories of the three regions.

The smallest of them — Uganda — is sandwiched between Kenya on the East and Belgian Congo in the West, and is landlocked, having no outlet to the sea. All its trade is handled by Mombasa, which is the chief port of Kenya as well. Bordering both Kenya and Uganda on their South lies Tanganyika, with Dar-es-Salaam as its capital and chief port. The Lake Victoria extends across these three countries. Nairobi, the Capital of Kenya, lies 5,452 feet above sea level. Kampala, the capital of Uganda, lies very near the Equator. For all the three territories, there is a common administration as regards subjects like Communications, Income-tax, Finance, Customs, Railways, Posts and Telegraphs and Industry which is under the overall supervision of the East African High Commission.

Of the non-African groups in British East Africa, Asians particularly have considerable political contacts and commercial interests. The population (combination) break-up of these areas (relating to 1958) is as follows:

	Kenya	Tanganyika	Uganda	Total
Europeans	64,700	21,200	9,600	95,500
Asians	1,65,000	80,900	58,700	3,04,600
Arabs	35,500	21,400	2,100	59,000
Others	5,700	4,100	1,400	11,200
Total Non-Africans	2,70,900	1,27,600	71,800	4,70,300
Africans	60,80,200	87,88,400	56,95,200	2,05,63,800
Grand Total	63,51,100	89,16,000	57,67,000	2,10,34,100

Shortly Tanganyika will be achieving a certain degree of independence. In Kenya and Uganda too, there is active struggle going on for achiev-

ing independence. In fact, in these two areas, the natives even now hold a few official and ministerial positions.

The principal towns of Kenya, of which Nairobi is the Capital, are—Mombasa—British East Africa's main port—Kisumu, Nakuru, Eldoret, Kericho, Kitale, Lamu, Nanyuki and Malindi.

Kampala is the capital and commercial city of Uganda. Entebbe on Lake Victoria is the seat of Government, which is in Uganda. The other important towns are: Jinja, Mbala, Soroti, Masaka, Kasese and Fort Portal.

Dar-es-Salaam, capital and commercial city of Tanganyika, as well as its chief port, is the largest city in that country. Other important towns are: Tanga, a port as well as the headquarters of sisal industry, Lindi & Mtwara (both ports), Mwanza, Arusha, Moshi, Bukoba, Tabora, Mbeya and Iringa.

Economic Conditions

The economy of the three territories is primarily agricultural. Their major exports are Coffee, Cotton and Sisal. These accounted for 60 per cent. of the total exports in 1958.

The economy of Kenya rests mainly on the export of a number of agricultural and mineral products, such as coffee, tea, sisal, pyrethrum, cotton, wattle, gold, sodium bicarbonate and Kyanite. The industries of Kenya are concerned with processing of agricultural products, such as pyrethrum, tea and cotton, and the canning of fruits and vegetables. Other industries are flour milling, cement manufacturing, and brewing.

Uganda's economy also is based mainly on coffee and cotton, which together account for 85 per cent. of its exports. Other important exports are copper and tea. Tea yields in Uganda are said to be higher than in India and Ceylon, and the Uganda Government have acquired large estates for the purpose of training Africans to enter the tea industry.

The cotton crop is grown exclusively by Africans. The ginneries, however, are in the hands of non-Africans, but African Co-operative enterprises have recently acquired 12 ginneries. Altogether, there are 141 ginneries operating in Uganda today.

To Uganda goes the distinction of being the largest producer of coffee in the Commonwealth. The Coffee Industry Board is responsible for the marketing of all the coffee produced in Uganda with the exception of the Arabica crop and the produce of registered estates.

The industries of Uganda include, in the main, two sugar factories, with an annual production of about 80,000 tons, the Kilembe copper mines, whose exports in 1957 were of the order of £1.6 million, one textile factory, one cement factory, one cement asbestos factory and two breweries, among others.

Tanganyika's economy also depends mainly on her main agricultural products, viz. sisal, coffee, and cotton. Cashewnuts, groundnuts, hides and skins, lead ore, gold, diamonds, etc., are the other important products. Tanganyika has not got many secondary industries, but work is under way for two big flour mills and a rubber and canvas shoe factory.

Internal Means of Communication

Regular passenger and cargo steamers from Europe, Japan and India touch Mombasa, the principal seaport of Kenya. International air services connect Kenya with Europe, India and North and South Africa. Nairobi, the capital of Kenya, has a first grade international airport. Internal communications are rail, road and air services.

For its import and export trade, Uganda depends almost entirely on Mombasa port in Kenya, which is 800 miles away. Internal communications depend chiefly on road transport. The railways serve only the Southern part of Uganda. Entebbe has an international airport, and is a halting station for some of the well-known international airlines. The East African Airways Corporation operates a daily service between Entebbe and Nairobi.

Ships from many parts of the world call at Dar-es-Salaam, which is the chief port of Tanganyika. Internal communications are provided by rail, which cuts across the country from Dar-es-Salaam to Mwanza on Lake Victoria and Kigoma on Lake Tanganyika. To a large extent, however, the country is dependent on road transport for movement of goods. The East African Airways operate a daily service between Dar-es-Salaam and Nairobi.

The main mode of transport inside the territory is Railway and the Motor Truck, though the Railways handle the cargo from the ports

to the interior. The rates of freight by Railway and Motor Truck are as per appendix 17. The Motor Transport in the interior is cheaper and efficient compared to the railways.

Banking

Banking is well developed in Africa and some of the Indian Banks and Insurance Companies also are working there. The following are the important banks:

- (1) The Bank of Baroda Ltd.
- (2) The Bank of India Ltd.
- (3) Standard Bank of South Africa.
- (4) Barclays Bank D.C.O.
- (5) The National and Grindlays Bank Ltd.
- (6) The Ottoman Bank.

The East African currency which circulates in Kenya, Uganda, Tanganyika, Zanzibar, British Somaliland and the Aden Protectorate, is issued by the East African Currency Board, established in London. The standard coin is E.A. Shilling, which is divided into 100 cents. Coins issued are of 50 cents, 10 cents, 5 cents and 1 cent. Notes are issued in denominations of Sh. 10,000, Sh. 1,000, Sh. 100, Sh. 20, Sh. 10 and Sh. 5. The E.A. pound, i.e. E.A. Sh. 20 is at par with the Sterling.

The Banks here advance against stocks as well as on clean credit basis. The normal rate of Bank interest is 6 to 7 per cent. The market rate is 6 to 9 per cent.

Market

At Nairobi, Commission Agents, as well as Importers and Wholesalers, are mainly concentrated at a place called 'Indian Bazar Street'. At Mombasa, the market is located within a radius of few furlongs called 'Langoni Road, Jain Street'. At Dar-es-Salaam, the market is situated at Bagamoya Street, while at Kampala, the Importers have spread themselves all over and there is no particular street.

Method of Business

The import trade as well as the internal distribution of textiles is in the hands of Indians mostly Gujaratis. These Indians migrated there generations ago. In spite of such a long period that has elapsed since they migrated to this continent, their dress habits, language, culture and religious habits are very much the same as in India.

The trade is channelised through the following class of traders:

1. Commission Agents.
2. Importers and Wholesalers.
3. Retailers.

Commission Agents: The Commission Agents here also charge commission upto 3 per cent. They play a very important part as, often, the importers prefer to book business through them. Some Commission Agents deal exclusively in textiles (i.e. cotton, rayon, woollen, etc.) The Commission Agents generally desire to have business on a monopoly basis with a particular manufacturer.

Importers and Wholesalers: The functions of these are the same as in India. The Importers of Mombasa, are making purchases not only for the Kenya market but for Uganda as well. The goods are being distributed to Uganda market mostly through Mombasa. Hence the importers of these places are placing orders in larger quantities than Dar-es-Salaam.

Retailers: The retail trade is also controlled by Indians.

The main competitor, Japan, has large organisations which have established offices in East Africa and many of their representatives cater day-to-day business not only in textiles but in other commodities as well. Over and above these organisations they have appointed Commission Agents throughout East Africa. Though the business may be booked by Japanese representatives, the business is yet channelised through Commission Agents. Through all these channels, Japan is able to control some 90 to 95 per cent. of exports of rayon piecegoods to British East Africa. The other European countries who are also supplying rayon goods are working mainly through Commission Agents.

There are Indian Merchants' Chambers at Nairobi, Mombasa, Dar-es-Salaam and Kampala. These Chambers are fairly important bodies.

**(For a list of Commission Agents and Importers,
see Appendix 18A-18D)**

Terms of payment: Most of our competitors are doing business on Letters of Credit terms. Indian exports of cotton textiles, which is one of the main lines of business in Africa, is done on basis of credit which extends upto 90 to 120 days.

It was reported, however, that the Importers in Africa are buying cotton textiles on credit and utilise the money for financing imports from Japan, as Japan sells only on Letters of Credit Terms. For Rayon textiles, they would prefer to have sight drafts, but are prepared to negotiate business even on Letters of Credit terms.

In the internal trade, the Wholesaler extends credit to the Retailer from 60 to 90 days.

Dress Habits and Consumer Preference

The dress of Europeans and Asians is nearly of the same type as in India. The Europeans, both ladies and gentlemen, wear their usual dresses (frocks and suits). Asians women and men wear their usual dresses of Sarees and suits. The dresses of Africans are different. Most of the women still wear the **Khanga** which is used as a sort of cotton **Shawl** on their heads and shoulders. The most popular dress among women is something akin to Burkha called **Bui-Bui**. **Bui-Bui** is made from black coloured Crepe or Taffetta with a soft finish. This dress is worn by African Ladies who follow the Muslim faith. The men wear trousers and shirts. However, in the cities, both African men and women are fast changing over to westernised dresses. The men wear regular woollen suits or shirts and trousers, while the women wear frocks.

Another type of popular dress (Kikoies and Lungies) worn by Africans. This is worn in India also by some Muslims and fishermen. On the top of Lungies, the men wear a cotton shirt.

What are the consumer preferences of the people of this region? Africans basically like cotton cloth, but they freely buy Filament and Synthetic fabrics, as the lustre and softness of the latter is much superior to those of cotton fabrics. The Africans are extremely price-conscious and they only wish to have a cloth which is in the vicinity of 12d. to 18d. per yard. The Spun Rayon muslins satisfy this condition. In Spun Rayon, the Africans desire mostly printed cloth. About 70 per cent. of the Spun Rayon fabrics are supplied in printed form. Further, they want a cottonised finish on the fabric and, as such, resin finish is given on Spun Rayon. The colours asked in Spun Rayons as well as in filament synthetics, are very bright and deep. Lighter pastel shades are not popular. Though price-conscious Africans like to buy cloth which not only resembles cotton but also the cloth with nylonized print. Japan, therefore, supplies a lot of filament fabrics and even Spun Rayon fabrics

with Nylon finish. This perhaps satisfies the African buyer's notion of cheap price together with Nylon finish, though it is not actual Nylon.

In prints, the Africans have a taste of their own. There is a special type of print called 'African Design' which is particularly popular in the interior of Africa. They do not like prints of animals or human figures but want flower designs printed on the borders. (To give an actual idea of the African designs printed samples of cloth are given.) The Council has been supplied with a number of cloth samples with African Designs. These African designs are popular only in the interior parts of Africa. In the Cities, the taste is fast changing to Western styles of print, and so in future it should not be very difficult to cater for the type of prints demanded by the people living in these cities. The preferences of Asians and Europeans are almost the same as in India and as such no special reference is being made here.

Varieties in Demand

We have tried to give the varieties in demand by Europeans, Asians and Africans as well as those in demand in the different territories separately. Repeated mention of some of the varieties therefore becomes unavoidable, as the prices obtained in different markets are different.

The following are the varieties which the Europeans prefer.

Varieties	Width	International C.I.F. price per yard.
Nylon Taffetta printed	36"	40d.
Nylon Taffetta Plain	36"	32d.
Nylon Satin Plain	36"	47d.
Nylon Satin printed	36"	56d.
Nylon Crepe plain	36"	46d.
Nylon Crepe printed	36"	55d.
Terylene Shirtings	36"	45d.
Ace. Taffetta plain	36"	27d.
Ace. Taffetta printed	36"	32d.
Spun Rayon thick varieties		
mixed with cotton plain	36"	40d.
—do— printed	36"	48d.
Spun Rayon mixed with		
Terylene plain	36"	40d.
—do— printed	36"	48d.
Nylon Brocade	36"	54d.

The Asians' taste is the same all over British East Africa. It is more or less identical with our taste. The varieties preferred by the Asians are as under:—

Varieties	Width	International C.I.F. price per yard.
Muslin ptd. 89 x 60	36"	14½d.
Tussor plain dyed	36"	14d.
Tussor printed	36"	16d.
Tussor printed and Embossed	36"	17d.
Fujette plain dyed	36"	11½d.
Fujette printed	36"	13½d.
Fujette printed and Embossed	36"	14½d.
Cotton finish Muslin printed	36"	14d.
Nylon finish Muslin printed	36"	17d.
Sheoze Nylon finish printed	36"	16d.
Nylon finish crepe Rayon ptd.	36"	23d.

At present, Nylon finish and Cotton finish on Spun Rayon and Viscose fabrics are very popular in these markets. The consumers pay about 2d. per yd. more for this finish. They cannot make out the real quality due to the finish, hence they are tempted to purchase. (The samples of the qualities referred to here have been collected and can be seen at the office of the Silk and Rayon Textiles Export Promotion Council, Bombay.)

The Uganda Africans have not got a very big preference schedule. Though the other varieties are also in demand, the following are mostly in vogue:—

Varieties	Width	International C.I.F. price per yard.
Nylon Taffetta Plain	36"	32d.
Nylon Taffetta Printed	36"	40d.
Nylon finish Muslin prints	36"	17d.
Nylon Muslin Plain	36"	15d.
Nylon finish Sheoze ptd.	36"	17d.
Half crepe printed	36"	19d.
Fujette	36"	14d.
Sheoze printed	36"	17d.
Sheoze plain dyed black	36"	11d.
Fujette ptd. & Embossed	36"	21d.

Varieties	Width	International C.I.F. price per yard.
Tussor printed	36"	20d.
Tussor plain	36"	17d.
Tussor Embossed & ptd.	36"	21d.
Cherry Voile	36"	9d.
Muslin plain	36"	11d.
Muslin printed	36"	14d.
Kikoi	43" x 73"	Sh. 41|- per 20 Pcs.
"	40" x 70"	Sh. 40|- "
"	42" x 72"	Sh. 45|- "
"	46" x 76"	Sh. 52|- "
"	48" x 78"	Sh. 58|- "
"	54" x 108"	Sh. 100|- "
Grey Muslin 68 x 68 (30 x 30 dull sized)	36"	9d.
" 89 x 60	36"	10d.
Taffetta Brocade coloured	36"	12d.
Gingum	36"	13d.

48" & 42" widths are very popular in the above market. This width is suitable to African people.

In Kenya the taste of Africans is for the undermentioned varieties:—

Varieties	Width	International C.I.F. price per yard.
Muslin plain 60 x 60	36"	11d.
Muslin ptd. 60 x 60	36"	12½d.
Muslin plain 68 x 60	36"	11½d.
Muslin plain 68 x 68	36"	12d.
Muslin ptd. 68 x 68	36"	13½d.
Muslin plain 89 x 60	36"	13d.
Muslin ptd. 68 x 60	36"	13d.
Nylon Taffetta plain	36"	32d.
Nylon Taffetta ptd.	36"	40d.
Nylon Georgette Plain	35"	42d.
Nylon Georgette Printed	44"	52d.
Crepe Plain	36"	20d.
Crepe Printed	36"	22d.
Ace. Crepe plain	36"	27d.

Varieties	Width	International C.I.F. price per yard.
Acetate crepe ptd.	36"	30d.
Acetate Taffetta plain	36"	27d.
Acetate Taffetta ptd.	36"	31d.
Satin plain dyed 8000 threads	36"	19d.
Satin printed	36"	24d.
Acetate Satin plain 12,000 threads	36"	32d.
Acetate satin printed	36"	42d.
Saree material Georgette plain	44"	19d.
Georgette printed	44"	23d.
Nylon American plain	44"	33d.
Nylon American ptd.	44"	42d.
Nylon 30 x 30 plain	44"	31d.
Nylon 30 x 30 ptd.	44"	39d.
Pure silk sarees	44"	
Nylon satin printed	36"	56d.
Nylon satin plain	36"	47d.

The taste of Africans vary from territory to territory. This explains why the Tanganyika Africans like the following varieties more :

Variety	Width	International C.I.F. price per yd.
Khanga cotton	46 x 66"	Sh. 64/- per 20 pcs.
Muslin ptd.	42 x 20 yds.	14d. per yd.
Subhaya	58" x 120 Yds.	Sh. 9/- per pc.
Kikois	42" x 72"	Sh. 2/- per pc.
Sheer Crepe printed	36"	17d.

The other important varieties which are in great vogue are Khangas, Lungis or Kikoies, Gingham, Sarungs and Subhaya.

Khangas are mostly supplied in cotton, though a little quantity is supplied in Spun Rayon as well. The Khangas are 46" x 66" in size and are a scarf type with a square print on the borders. In the centre, however, a big square and some slogans are printed. Japan supplies the Khangas exclusively.

The Kikoies or Lungis are demanded in the following sizes and the prices quoted are for lots of 20 pcs. each.

43" x 73" x 12Lbs.	Sh. 41/-	for 20 Pcs.
40" x 70" x 10 "	Sh. 40/-	for 20 Pcs.
42" x 72" x 11 "	Sh. 43/-	for 20 Pcs.
46" x 76" x 13½ "	Sh. 52/-	for 20 Pcs.
48" x 78" x 15 "	Sh. 58/-	for 20 Pcs.
54" x 108" x 25 "	Sh. 100/-	for 20 Pcs.

Among these, the Lion Brand Kikoies or Lungis are the most popular.

The difference between Sarungs and Gingham is that whereas in Sarungs, after a distance of 1½ yds., there is a different colour pattern in the middle, in Gingham, there is no difference in pattern and it is a straight 30 yards piece. The price of both is the same (samples of both are kept at the Council's Office). However the most popular varieties are Muslin No. 9 and Shirting No. 4 and a cloth of construction 30's x 30's with 68 Reed and 60 pick. Certain heavy qualities like Subhayas in 58" x 120" and 54" x 108" are demanded in Uganda.

Buying and Booking Season

The buying season in Tanganyika is from April to October, when the crop is marketed. At Ramsan too there is some demand but it is comparatively meagre, as the crop will have been marketed by then. So the goods should reach there by April and onwards. For booking for this season, competitors are in the market in December/January, as they take two months for delivery and 1½ months for shipment and clearance time. Indian manufacturers also should start booking orders in this market in January or early February at the latest; otherwise most of the orders will have been booked by our competitors.

The climate in Kenya is the same almost throughout the year. Hence the buying season extends to practically all the year round. But the buying season in Uganda is July/August/September, which affects the purchases of Kenya, as their purchases partly depend on the sales being made to the Uganda merchants. April and May are supposed to be the slackest months during the whole year. Manufacturers' representatives should, therefore, avoid going there in March, April, May. They should visit this market in July/August/September.

Imports and Import Policy

Imports from all Commonwealth countries are under an O. G. L. and as such no import licence is required. For imports from non-

commonwealth countries, import licences are necessary and these are available freely without too many formalities, except to Communist countries for which licences are issued on a restricted basis.

As per the Belgian Congo Treaty, which applies to British East African territories, there cannot be any preferential duty levied for Commonwealth or non-Commonwealth countries. In this Treaty, there is no clause putting any quantitative restrictions on imports from any country. It is, however, reported that there is a total ceiling on imports of all commodities from Japan, but there is no ceiling fixed on imports of textiles. As such, licences for import of textiles from Japan are given freely.

There are no Trade Agreements between East Africa and any other country.

The total imports of textiles inclusive of Cotton and Rayon have been estimated to be 180 to 200 million Sq. yards, out of which imports of Rayon goods were of the order of 130 million Sq. yards in 1957 and 80 million Sq. yards in 1958 and 60 million Sq. yds. in 1959. This continued decline in imports of Rayon goods has been attributed to three reasons. Firstly, there has been a decline in the imports of textiles generally on account of the general recession in the economy of Africa. Secondly, the effects of substantial increase in duties on Rayon goods in the year 1958 were felt only in 1959. Thirdly, the swing towards Rayon which was there in 1957 has stopped and, on the contrary, the swing has shifted back to cotton cloth, due to the mistaken impression that the latter is comparatively more durable than Rayon. (The people are not fully aware of the proper methods of washing and ironing.) Further, Rayon cloth has become costlier on account of the increase in the difference in customs duty on Rayon and Cotton.

The import of 60 million sq. yards in 1959, if taken as the present-day demand, consists of 85 per cent. (100 per cent.) of Spun Rayon cloth (51 million sq. yds.) and 15 per cent. (9 million sq. yds.) of Filament and Synthetic Rayon fabrics. Out of this 15 per cent. about 50 per cent. to 60 per cent. (5½ million sq. yds.) is the demand for Synthetics and hardly 40 to 50 per cent. (3½ million sq. yds.) is the demand for Filament fabrics. The average value of Filament and Synthetics fabrics comes to Rs. 1-8-0 per yard. This means that their requirements of Filament and Synthetic fabrics in value would be about Rs. 1.3 crores. The price of Spun Rayon cloth varies from As. 12 to Re. 1, the average value being 14 annas. Thus the value of 51 million sq. yards of Spun Rayon cloth imports would be

Rs. 4.5 crores, making a total for Rayon fabric imports of approximately Rs. 6 crores in the year 1959.

India exported in the year 1959 five lakh yards of Rayon fabrics. Though the share of India in the total imports of Rayon fabrics is negligible, yet, considering the fact that India does not still manufacture 100 per cent. Spun Rayon fabrics and exports only Filament and Synthetic fabrics, it comes to a little over 5 per cent. of the total imports of Filament and Synthetic fabrics. In spite of the fact that exports from India are very small, India ranks second only to Japan in total Rayon imports into Africa.

However, if India wishes to have a larger share in the total imports to British East Africa, India shall have to manufacture 100 per cent. Spun Rayon fabrics which are mainly produced by Japan, mostly in the following constructions :—

(i) Muslin No. 9, in 30s x 30s in 89 Reeds x 60 Picks—dyed, resin finish and printed. (ii) Muslin No. 1 in 30s x 30s in 68 Reeds x 60 Picks—dyed, resin finish, and printed.

The Delegation was of the view that it may not be possible to produce immediately all the varieties in Spun Rayon and as such a study was made for the possibility of sale of above construction fabrics in grey and not in plain or printed. A good demand exists for grey Spun Rayon fabrics also which can be sold in competition with cotton sheetings (30s x 30s in 89 Reeds x 60 Picks), asked for at 9d. per yard C.I.F. The possibility of sale of this may be worked out with the incentives that are announced by the Govt. of India (for countrywise & qualitywise imports see Appendix 19A-19M).

Customs Tariff

The customs duty in 1957 was 30 cents per sq. yard on Cotton fabrics and 50 cents or 20 per cent. *ad valorem*, whichever is higher on Rayon fabrics. However, the customs duty was revised in 1958 and was raised to 50 cents on Cotton cloth and 80 cents per sq. yard on Art Silk fabrics or 30 per cent. *ad valorem* whichever is higher. There is no other tax or duty to be paid over and above this. These duties are applicable in Kenya, Uganda and Tanganyika. (See Appendix 20).

There are some trade restrictions for trading within these three territories. If an Importer of Nairobi has no licence to trade in Mom-

basa, he is not allowed to get the goods in Mombasa, unless he acquires a trading licence for that place. This rule applies for trading in all the three territories. The trading licences can be obtained by obtaining a permit, for which fees are charged for registering the merchants. The fees are approximately 600 shillings for Importers, Exporters and Wholesalers; 200 Shillings for working as purely Wholesalers or Retailers; and 50 shillings for working as Brokers.

Shipping

Three Steamship companies are plying between India and East Africa. They are:—

1. The Eastern Shipping Corporation.
2. British India Steam Navigation Co. Ltd.
3. The India Africa Line.

The Eastern Shipping Corporation and the British India Steam Navigation Co. Ltd. ply one or two passenger-cum-cargo boats, respectively, between Bombay and East African Ports. Eastern India (Calcutta and Madras) is linked with East Africa by four cargo boats of the India-Africa Line.

The time taken by steamers from Bombay to East African Ports is about 12 to 13 days.

The freight rates on Art Silk piecegoods from Bombay to Mombassa are Rs. 90/- per ton of 40 C. ft. They are the same for Dar-es-Salaam also.

Import Documents

The formalities regarding invoices and documents for imports that have to be fulfilled are as follows:

1. Four copies of Commercial Invoices giving full description of the commodity specification and weight, both gross and nett, along with a detailed packing list for each case should be prepared. The invoice should also certify that the goods invoiced are of "Indian Origin".
2. The Bill of Lading.
3. Insurance Policy, in case of C.I.F. Sales.

Internal Production

The British East African Government has not only plans for the development of the Textile Industry but also for General Industrial development.

The British East African Government has plans to grant licences for manufacturing 105 million yards per year of Cotton and Spun Rayon textiles in the near future. This capacity is to be divided equally among the three territories at the rate of 35 million sq. yds. per year per region.

At the moment, there is only one cotton factory working at Jinja (in Uganda) having a capacity to produce 15 million yards per year. Permission has been granted to this factory to expand its capacity and production upto 30 million yards per year, and this expansion is likely to be carried out in the near future.

In Tanganyika, there is already a factory with 70 looms with a yearly production of one million yards of Spun Rayon fabrics. Another factory which has been granted a licence to work 130 looms with a production capacity of three million yards per year, has already placed orders for the requisite machinery. Half of the machinery has arrived on the site and the factory may go into production shortly.

The Governments of all the three territories are interested in increasing the production of textile fabrics, mainly of Cotton and Spun Rayon.

The particulars of the business licences granted by the Govt. to the factories as given by the President of the Indian Merchants' Chamber, Nairobi are as follows:

1. Nanji Textiles Mills	..	..	30	Million yards.
2. Kenya Rayon Textiles	..	..	20	" "
3. Kenya Textiles	..	..	3	" "
4. Gardi Textiles	..	..	7	" "
5. Tajini Textiles	..	..	3	" "
6. Kalidas Kanji Spun Rayon	..	..	3	" "
7. Moshi Trading Co.	..	..	1	" "
8. Tanganyika Textiles	..	..	3	" "
			<hr/>	
			70	" "
			<hr/>	

Against the plans for 105 million yards, the licences have recently been issued for 70 million yards as above. One has to wait and see how far all these licences will be utilised. The Kenya Rayon Textiles is expected to place 5 to 6 million yards of cloth in the market in the coming years. As all the licences issued may not be utilised in the near future, it is estimated that about 50 million yards only will be produced in the next three years. Even if it be so, out of the total import requirements of textiles (Cotton and Rayon) of 180 and 200 million yards a year, these territories will still have to import the balance of 130 to 150 million yards. Moreover, the demand is steadily increasing day by day, so that Imports will have to be continued for some more time. Though Kenya Rayon Textiles is also granted a licence to manufacture Filament rayon fabrics, it is opined that they will first start with Spun Rayon fabrics, as it is easier to manufacture Spun Rayon fabrics.

Foreign Trade

The total exports of these territories during the year 1958 and 1959 were as under :

Year		Kenya	Uganda	Tanganyika
1958	..	£ 29,299,607	45,409,024	41,706,596
1959	..	£ 33,305,982	42,091,433	45,286,622

Out of the above exports from these territories the exports to India during the year 1959 from these territories were of the under-mentioned values:

Year		Kenya	Uganda	Tanganyika
1959	..	£ 1,476,755	7,323,749	2,737,705

The total imports into these territories during the year 1959 were:

Year		Kenya	Uganda	Tanganyika
1959	..	£ 78,820,293	14,337,768	28,339,040

Out of the above imports with these territories, India's share was:

Year		Kenya	Uganda	Tanganyika
1959	..	£ 3,588,492	623,541	2,105,235

Complaints

Several complaints were brought to the notice of the Delegation regarding Indian fabrics and shipments. As the complaints were mostly

similar to those from Iran and Iraq, these have not been repeated here. Further, a full analysis of these complaints and the remedies therefor have been dealt with in detail in our general observations.

Publicity

The main mode of publicity is through newspapers and Cinema slides. The following are the leading Newspapers:—

KENYA

1. East Africa Standard (English)
2. National Guardian (Gujarati)
3. Mombasa Times (English).

TANGANYIKA

1. Tanganyika Standard (English)
2. Mwafrica (Swahili)
3. Ngrumo (Swahili)
4. Tanganyika Standard (Gujarati)
5. National Times (Gujarati)
6. Nutan Africa (Gujarati)

However, the market being very wide, the best publicity would be the man on the spot i.e. representatives of Indian Exporters should be there. The distribution of calendars is greatly appreciated by the Importers.

ZANZIBAR

General

The Zanzibar Protectorate, which consists of the Islands of Zanzibar and Pemba, lies on the East Coast of Africa about 40 miles North-East of Dar-es-Salaam. It has an area of 1,020 sq. miles. The Administration of the Protectorate is carried on by the Sultan under the advice of the British Resident. The main language is Swahili.

Being in the Tropics, the place has a hot and humid climate and the rainfall is medium to heavy.

The estimated population is 2,85,000, out of which Africans are 76 per cent, Arabs 16 per cent, Indian and Goan 6 per cent, and others 2 per cent, the Europeans being negligible.

Economic Conditions

The economy of the Protectorate is based almost entirely on its two main agricultural products, viz. cloves and cocoanuts. There has been a setback in the offtake of cloves by the traditional customers in recent years, and, to that extent, the economy of Zanzibar can be said to have been depressed.

Internal Means of Communication

The chief town and port is Zanzibar, which is also the capital of the Protectorate. The vessels of the British India Steam Navigation Company and the Eastern Shipping Corporation touch Zanzibar. The East African Airways Corporation have a daily service between Zanzibar and East Africa. There is also considerable flow of traffic between Zanzibar and India and the East Coast of Africa. A network of roads provides good internal communication, and this is mainly by motor trucks and buses.

Banking

The following Banks operate in Zanzibar:

1. The National Overseas and Grindlays Bank Ltd.
2. The Barclays Bank, D.C.O.
3. The Standard Bank of South Africa Ltd.

Zanzibar has a common currency with the rest of East Africa—the East African Shilling. Banks do not advance against stocks but give clean credits to merchants.

Method of Business

Here also, business is done through commission agents, importers, wholesalers and retailers. The business is controlled both by Arabs and Indians. The terms and methods of business are the same as those in vogue in British East Africa.

(The list of Importers and Merchants is given in Appendix 21)

Terms of Payment

The business is generally done on Letters of Credit terms with Japan. With India, however, documents against acceptance or documents against payment are sought. But importers are prepared to negotiate business even by opening Letters of Credit.

Dress Habits and Consumers Preference

Dress habits are the same as those prevailing in the East African countries. Khangas are most popular.

Varieties in Demand

(Tables of qualitywise exports from India and Japan are given in Appendix 22A-22E).

(Another table giving comparative figures of imports of principal textiles from principal textile countries is given in Appendix 23).

Buying and Booking Season

The selling season is March, but orders are booked from November to December.

Imports and Import Policy

Imports from the Commonwealth countries fall under O.G.L.; for imports from non-Commonwealth sources, import licences are necessary. Here also, like the British East African Market, spun rayon fabrics are in greater demand than filament rayon fabrics. As restrictions are put on the issue of licences for goods from Japan, people are gradually shifting towards either cotton cloth or filament rayon fabrics from countries in respect of imports of which there is no restriction. As there

are no restrictions for imports from India, India is in a relatively favourable position. Business can, therefore, be developed to a large extent even in filament and synthetic fabrics.

Customs Duty

The duty on rayon and pure silk goods is 20 per cent **ad valorem** on cotton 15 per cent **ad valorem**. Licences are issued on a restricted basis for import of goods from Japan, though no definite percentages have been fixed.

Foreign Trade

The total foreign trade of Zanzibar during the last few years was as follows:

Year	Trade Imp. includ- ing transhipment	Domestic Exports £	Re-exports including transhipment	Total Exports	Balance Trade £
1955	6,440,864	4,955,124	1,826,571	6,781,695	+340,831
1956	5,995,314	4,941,753	1,220,705	6,162,458	+167,144
1957	6,156,847	4,746,778	1,192,004	5,938,782	-218,065

(A table showing the countrywise Domestic Export for the years 1957, 1958 and 1959 is given in Appendix 24).

It will be seen that, in 1957, the Protectorate had an adverse balance of trade due to the decline in the prices of cloves.

There was a time—that is before the development of Mombasa, Dar-es-Salaam and other mainland ports, Zanzibar was the distribution centre for the whole of East Africa.

Much of the entrepot trade is now lost to Zanzibar. Notwithstanding this, even today, about one-fifth of the imports into Zanzibar are either transhipped or are re-exported. For, there are in Zanzibar very good warehouses where goods can be kept dutyfree for re-export to other parts of Africa.

Cloves account for 80 per cent of the total domestic exports (excluding re-exports and transhipments). The main buyers of cloves are: Indonesia (50 per cent), India (30 per cent) and Singapore (4 per cent).

In view of the falling market for cloves, the Zanzibar Government sent a Clove Mission to India in 1958 to seek a relaxation of the restric-

tions imposed by the Government of India on imports of cloves. Due to the paucity of foreign exchange, however, the Clove Mission was not successful in obtaining a relaxation of all restrictions on imports of cloves into India.

Imports from the U.K. are of the order of 25 per cent to 30 per cent. Other Commonwealth countries who contribute to the imports in Zanzibar are: British East Africa (14 per cent), India (8 per cent to 10 per cent) and Australia (5 per cent). Among the Foreign Countries, Japan heads the list with 9 per cent, followed by Burma (7 per cent), Netherlands (4 per cent), Iran (4 per cent) and Germany (3 per cent).

As far as exports are concerned, Indonesia is the largest buyer of Zanzibar products (mainly cloves) with a share of 35 per cent to 40 per cent, followed by India (25 per cent), British East Africa (17 per cent), Hong Kong (3 per cent), Singapore (3 per cent) and the U.K. (2 per cent).

Publicity

The same measures, as are recommended for British East Africa may be adopted.

MAURITIUS

General

In the Western Indian Ocean near the Tropic of Capricorn about 1500 miles from the east coast of Africa, lies the Island of Mauritius. It is approximately 40 miles long and 30 miles wide with an area of about 720 square miles. The Island is encircled by coral reef and blue-green water.

Mauritius generally has two rainy seasons; one during the period September-November and the other between the months of January and April. The rainfall is plentiful and the Island depends mainly on agriculture.

Mauritius is one of the most thickly populated countries of the world with a density of 834 per sq. mile. Its population of six lakhs consists mainly of Indo-Mauritian (Indian immigrants and their descendants) 67 per cent; Europeans and descendants of Europeans and people of African and mixed origin 27 per cent; and Sino-Mauritian (Chinese immigrants and their descendants) 6 per cent. The population in Mauritius is rising very rapidly.

The Indians first came to Mauritius as workers on sugarcane plantations over a century ago and have made Mauritius their home. The Biharis form two-thirds of the Indian community, the rest being immigrants from the Madras State. The mercantile section of the Indian community, however, is mostly Gujaratis, who came to Mauritius much later than the Biharis and the Madrasis.

It is a curious fact that Mauritius was found uninhabited by the French when they first took possession of the Island. The Island had, therefore, no language of its own. Creole (a slang of old French) can be called the Lingua-franca of Mauritius. The Island was ceded to Britain soon after the Napoleonic war. Although it has been in British possession since then, English has not made much headway. All newspapers, except one, are in French. However, the language used for administrative purpose is English.

Port Louis, the chief port of Mauritius, is also its capital. Port Louis is, besides, the most important centre of commerce and trade.

Other important towns are: Curepipe, Beau Bassin, Rose Hill and Vacoas. They are all located at very short distances.

Economic Conditions

The economy of Mauritius is entirely dependent on the exportable surplus of its principal agricultural product, viz. Sugar. The whole Island looks like one vast sugarcane estate. Sugarcane is grown on every inch of cultivable land. Sixty per cent of the sugarcane plantations are owned by the French and the rest constitutes small holdings owned by Indian farmers. The annual production of sugar is around six hundred thousand tons. Aloe fibre, tea and tobacco are also grown in a small way. They do not, however, make any material contribution to the economy of the country.

Even with such a large production of raw sugar, it is surprising that Mauritius has no sugar refining mills as yet. All sugar is exported in the raw state and processed in foreign countries. The value of sugar exported from Mauritius represents more than 97 per cent of the total value of all its exports so that the sugar industry may be said practically to dominate the economic life of the Island.

All consumer goods are imported, which makes the Island entirely dependent on foreign countries for its requirements of many daily necessities.

Internal Means of Communication

The small size of the country inhibits the construction of railways. But first class tarmac roads provide a network of internal communications. The Island has an international Airport.

Banking

The local unit of currency is the Mauritius rupee, which is subdivided into hundred cents. It is linked to the sterling and is on par with the Indian rupee. The rate of Bank interest is 5 to 6 per cent although the market rate is 6 to 9 per cent per annum.

The following Banks operate in Mauritius :—

1. The Mauritius Commercial Bank Ltd., Port Louis.
2. The Mercantile Bank Ltd., Port Louis.
3. The Barclays Bank, D.C.O., Port Louis.

Banks do not normally advance money against goods, though advances on clean credits are very much in practice. The charges for opening Letters of Credit are 1½ to 2 per cent.

Market

The offices of Commission Agents, Importers and Wholesalers are all located in one place, that is in Port Louis at Bazar Street, though the retailers are spread all over.

Method of Business

Here business is controlled mainly by the Indians who are called Indo-Mauritians. Business is done through Commission Agents, Importers-cum-Wholesalers (who is normally the same person) and the Retailer. Although there are only 15 to 20 firms which are important in the textile trade there are innumerable Commission Agents as well. But the importers prefer to do business directly with the foreign exporter or manufacturer. There are also some merchants who prefer to do business through Commission Agents. All Commission Agents have to register their names with the Registrar, otherwise they are not allowed to trade. The fee for such registration is Rs. 200/- per year.

(For a list of Importers and Commission Agents See Appendix 25)

Terms of Payments: Letters of Credit are opened by the Mauritian merchants. Even with other countries, the payment is by Letters of Credit, and no credit is asked for by the local Mauritian merchants for import of Textiles.

In the internal markets, the importer, who is also the wholesaler, sells his goods on credit which extends from three months to six months and, sometimes, upto even one year. Accordingly they have to keep a large amount of money blocked for a long time because they have to sell on long-term credit whereas they purchase on cash basis. However, the Banks in Mauritius are helpful, as they give clean credits to good parties.

Dress Habits and Consumer Preference

The Indo-Mauritians who form the major portion of the population dress very much like us in India. The ladies wear **Saris** or **Punjabi Kamij** and **Salvar**. The girls wear frocks and skirts. Muslim ladies use **Burkha** which is now fast disappearing. The Europeans and the Sino-Mauritians use mostly the European type of dress. Men wear woollen

suits with readymade shirts which are imported. Ladies who wear Saris use more or less the same type of material as is used in India. They mostly prefer glass Nylon 44" either in flock print or in vat print. With the glass Nylon, Taffeta or Satin also is required as a lining. The designs on the printed fabrics are the same as those used in our country, although the Europeans prefer western type designs. The colour and finish of the material used also correspond with those of Indian taste.

The demand for printed and plain goods is in the ratio of 40 : 60 per cent.

Varieties in Demand

The varieties in demand are :

Variety	Width	International C.I.F.
		price per yard. Eng. £ sh. d.
Taffeta Acetate (from U.K.)	36"	17 d.
Cherry voils (Printed Jap.)	44"	13 d.
Flock printed Nylon, border designs	44"	44 d.
Taffeta embossed and printed	36"	19 d.
Nylon Taffeta printed	36"	50 d.
Glass Nylon	44"	18 d.
Linen Dyed	36"	11 d.
Nylon Satin	36"	44 d.
Linen printed	36"	13 d.
Fujette printed	36"	17 d.
Satin plain dyed	36"	14 d.
Shirting No. 4	36"	14 d.
Fancy Nylon mixed with viscose coloured yarn	—	—

Buying and Booking Season

The buying season is all round the year, but specially there are good sales during July to November. For this reason, the importers book their requirements from India and U.K. during the months of May and June. From Japan, they book orders three months earlier.

Imports and Import Policy

No import licences are required for Commonwealth countries. But it is necessary to obtain import licences in the case of non-Common-

wealth countries. These licences are, however, given freely though in the case of the Communist countries, they are given on a very restricted basis.

The total imports into Mauritius, from all over the world, of Art Silk and Synthetic fabrics during the year 1958 were 34 lakh sq. metres. The suppliers of art silk goods are as under :—

Japan	15 lakh sq. metres.
India	10 " "
U.K.	8 " "
Other countries	1 " "
	—
	34 " "
	—

Out of the total imports in 1958 as above, it is seen, India had as large a share as 30 per cent. In the countries visited by the Delegation, this is the only one country where India's share in the total imports, has bulked as large as this. This is mainly due to the fact that, being a Commonwealth country, India enjoys a preferential rate of duty which is 25 per cent **Ad Valorem** for non-Commonwealth countries, the rate of duty is 75 per cent **Ad Valorem**. This puts India's main competitor, Japan, to a very great disadvantage. Yet it is remarkable that the share of imports from Japan is a little over 45 per cent of the total imports. The supply of 15 lakh sq. metres of fabrics by Japan comprises, in the main, varieties of Spun Rayon fabrics, which are not manufactured in quantities in India. Even some Rayon Filament and Synthetic fabrics, such as Satin 3,600 threads and 4,000 threads, Acetate Taffetas, Nylon Taffetas and Nylon Satins supplied by Japan are not manufactured in India. The Delegation is of the considered opinion that, if India starts manufacturing the varieties which are in demand not only in Filament and Synthetic but also in Spun Rayon, our exports of Rayon goods to Mauritius are likely to increase considerably, thanks to the preferential duty advantage we enjoy over our main competitor. Our estimate of the demand of Spun Rayon Filament and Synthetic fabrics in Mauritius is in the ratio of 40 per cent to 60 per cent.

(For detailed statistics of imports of Rayon fabric from various countries including India see Appendix 26A-26D).

Customs Duty

The rate of duty is 25 per cent **Ad Valorem** for Rayon fabrics sup-

plied by Commonwealth countries and 75 per cent **Ad Valorem** for non-Commonwealth countries. There is no excise duty or any other local levy.

Shipping

From India, there is only one direct cargo service, viz. Scindia Steam Navigation Company's India-West Africa Service. But regular cargo and passenger services are provided from the U.K., Mediterranean Ports and the Far East. It takes only 10-12 days for a steamer to reach Port Louis from India. The charges come to approximately Re. 0.03nP per yard. A steamer from Japan takes over one month to reach Port Louis and the charges come to a little over Re. 0.06nP per yard. It is felt that, if India could establish a direct passenger service by Air or Sea it would help further to develop the trade with Mauritius.

Import Documents

The following documents are required to clear the goods from Customs :

- (i) The Invoice, along with a combined certificate of value and of origin written or typed on the back of the invoice, is required to be submitted in triplicate, by the exporters. **(Specimen of the Invoice attached. See Appendix 27).**
- (ii) Bill of Lading.
- (iii) Insurance Policy.

Internal Production

At present, there is no domestic production of Rayon and Cotton textiles in this Island. But it is likely that one firm may put up a factory of 50 looms to manufacture Filament Rayon fabrics. The Government of Mauritius is getting an economic survey of the Island made and plans for industrial development are afoot. The plans are not yet made public as they are still under study.

Foreign Trade

The total value of the trade of the colony in 1957 amounted to Rs. 594 million, made up of imports valued at Rs. 264 million and exports Rs. 330 million, with a visible favourable balance of Rs. 66 million. For purposes of comparison, the visible balance of trade for the last few years is given below :

Year	Total Imports	Total Exports including re-exports.	Excess of exports over imports.
	Rs. (in million)	Rs. (in million)	Rs. (in million)
1956	228.15	298.08	69.93
1957	263.82	330.29	66.47

It will be seen from the above that Mauritius has always enjoyed a favourable trade balance.

The trade figures reveal that the U.K. is the largest customer and supplier to Mauritius. The following table shows the distribution on a percentage basis of imports and exports of Mauritius :

Countries	Imports		
	Years		
	1955	1956	1957
	%	%	%
United Kingdom	40.3	33.4	35.6
Other Preferential Tariff Countries	39.0	37.3	39.0
General Tariff Countries	20.7	29.3	25.4
	100.0	100.0	100.0

Countries	Exports		
	Years		
	1955	1956	1957
	%	%	%
United Kingdom	81.7	77.4	71.6
Other Preferential Tariff Countries	17.4	21.9	18.3
General Tariff Countries	0.9	0.7	10.1
	100.0	100.0	100.0

Mauritius imports from India rice, gunny bags, cotton piecegoods, spices, etc.

Complaints

The following are among the complaints of the merchants in Mauritius :

One piece of Sari out of each case is cut by $2\frac{1}{2}$ " by the Customs in India. This amounts to a clear loss to the merchant. The stamping method is defective. The stamping ink penetrates in two to three folds, and thereby spoils the first two to three yards of each piece. Sometimes, the importers get the fabric in 32" width as against the contracted width of 36". The wooden cases are not seaworthy. They are received in damaged and/or broken condition, and the goods are found to be spoiled. Shade and assortments supplied are not as per the orders of the importers and hence the importers are unable to sell the goods which results in the blocking up of their capital; in addition, they lose their profits. The Sari material is not supplied in uniform lengths. The pieces for Saris should be in lengths of either 35 yds. or 30 yds., so that the retailer may not lose on account of any cut pieces being left behind. Mills should send their colour charts with samples, so that shade and assortment may be specified in the order. Polythene bags should not be used for piece packing, as the inside fabric when so packed does not at all look attractive.

Publicity

Though this country is small compared to other countries, yet this market is of great importance to us as the imports from India into this country can well be the largest. Hence publicity here would play a very important role.

One of the methods of publicity is through cinema slides. There are so many cinema houses in this country that it is difficult to give a complete list. However, for those who are interested, the Council can supply a list of these cinema houses. Other methods of publicity are distribution of calendars and advertising in the press. Neon Signs are not very popular in this country. The best publicity, however, is the man on the spot. It is highly desirable that Indian manufacturers and exporters should concentrate on this market in an intensive manner.

ETHIOPIA

General

With a population of 18 to 20 million comprising Amhars, Galles and others, Ethiopia is a kingdom benevolently ruled by His Majesty Haile Selassi. He is struggling to modernise a land which has been for centuries isolated from the rest of the world to catch up with the twentieth century. Before World War II, Ethiopia's principal link with the outside world was the Railroad to Djibouti in French Somaliland. Since 1952, the former Italian Colony of Eritrea has federated with Ethiopia giving it another outlet to the Red Sea through the port of Massawa. At present, the area of Ethiopia is approximately 457,142 square miles. The main languages spoken are Arabic and Amharic.

The country is divided into 15 provinces. The country's leading city and capital is Addis Ababa. Other cities and towns of importance are :—

(i) Dire Dawa, (ii) Asmara, (iii) Tessenei, (iv) Dessie, (v) Gondar, (vi) Port Assab, (vii) Port Massawa, (viii) Nazerath.

Economic Conditions

Ethiopia is a poor agricultural country but with rich potentialities for development. Many of the regions yield two crops in a year, the chief crops being Maize, Millet, Hemp and Coffee. The most important of these is Coffee.

There is an active movement going on for the industrial development of the country. Already there are four textile mills in the country and more textile mills are being planned and expansions to the existing ones also are being undertaken. There is one textile mill recently established with Indian collaboration. This mill is managed by Messrs Birla Brothers. Even in regard to cotton cultivation, an Indian national has collaborated with the Government to produce cotton on a very large scale in Ethiopia.

For its overall economic development, Ethiopia is receiving technical and monetary assistance from many sources — The World Bank, the United Nations, The United States Point-4 programme, Belgium, Swiss, French and even Russian advisers.

As stated above, coffee is produced in very large quantities in Ethiopia and the export economy and the foreign exchange position accordingly depend mainly on the prices realised by coffee in the export markets. In the last few years, there has been a sharp fall in the prices of coffee in the international market and as such, Ethiopia has been experiencing some shortage of foreign exchange.

Though at present, there is poverty in the interior part of Ethiopia, yet the standard of living of the masses of Ethiopia is likely to go up very fast, as great emphasis is being laid on all round economic and industrial development.

Internal Means of Communication

The important cities and towns of the country are linked by Road as well as by Railway. There is a railway line from Djibouti to Addis Ababa; Dire Dawa and also from Massawa port to Asmara and Asmara to Agordat.

Banking

The Banks generally do not advance against stocks. In certain cases, however, facilities by way of clean overdraft to the selected parties are given by the Bank. No other facilities like D.A. and/or D.P. terms are allowed by the Bank. The Bank rate of interest is 6 per cent. to 9 per cent. per annum.

Besides the State Bank of Ethiopia, (i) The Banque De l'Indo-Chine, (ii) Banca di Roma, (iii) Banco di Napoli, and (iv) Banca D'Italia are operating in Addis Ababa and Asmara.

The local currency is Ethiopian Paper Dollar divided into 100 cents, which is equal to Indian Rs. 1.90 nP. The exchange rate is 7 Ethiopian Dollars to a Sterling pound.

The prices for import business are quoted in U.S.A. cents only.

Market

The wholesale and retail sales markets in Addis Ababa are located at "MARKATO" or the Bazar, but the offices of the Importers are located at "Pyasa" which is about 4 to 5 miles away from the Bazar.

Method of Business

The Rayon Textile trade is in the hands of Indian Merchants, who are established in this country since many years. The Arabs are

also in the trade, but the main trade is with the Indians, (Hindus and Muslims).

External trade is done through the usual channels i.e. Commission Agents and/or Manufacturers' Representatives, importers, merchants and Retailers.

(The names of leading Importers and/or Wholesalers are given in Appendix "28".)

(Names of known Commission Agents or manufacturers' representatives are also given vide Appendix "28".)

The Commission Agents secure the orders from the Importers and charge upto 3 per cent. commission. In certain cases, the Importers are themselves the wholesalers who sell the goods to retailers.

Without a trade licence, nobody is allowed to trade. A trade licence could be obtained by Commission Agents and/or Manufacturers' Representatives, Importers, Wholesalers or Retailers, from the Ministry of Commerce and Industry on payment of a fee — Ethiopian Dollars 120.00 per year. For the initial registration of a company, the fees charged are one Ethiopian Dollar for every thousand Ethiopian Dollars Capital.

In Ethiopia, as in Sudan, the share of profit at each stage of trade is controlled by the Government. An Importer of Rayon and Silk Fabrics is allowed 10 per cent. profit on his net cost. A wholesaler is allowed 5 per cent. profit on his net cost, and a retailer also is allowed 5 per cent. profit on his net cost. If the goods are imported by an Importer, who is also a Wholesaler, the profit is restricted to 10 per cent. only. The price control, however, is not rigidly enforced.

Terms of Payment :—The question of selling goods on credit does not arise, as the terms of payment here are strictly on Letters of Credit only. Even in internal dealings, people deal more on cash terms than on credit.

Dress Habits and Consumer Preference

The national garments of Ethiopian males consist of the white **Shama**, which is a rectangular shawl, about 3 metres long, of hand spun or imported cotton yarn, ornamented at the end with a woven silk design, tight fitting jodhpuri trousers and a shirt, usually white, worn

outside the Jodhpuri trousers. Women and girls wear the **shama** with a full skirt. National garments are usually worn by city dwellers on special occasions. At other times, European style clothing is the normal wear.

Here again, the preference is mainly, for cotton cloth in comparison to rayon cloth. Cotton cloth is being locally produced largely in Mills as well as by handlooms. The ladies prefer to wear their dresses mostly in white. The colours that are in vogue are mainly light and pastel shades. Bright dark colours are also getting to be popular.

The imports of Spun Rayon filament and synthetic fabrics are in the ratio of 40 : 60.

In Spun Rayon, serge, which is most popular, is supplied in plain only. In Muslin, printed muslins are most popular.

In Filament Rayon fabrics also, plain fabrics are more popular. In Nylons, however, printed varieties are preferred to plain Nylon Taffetas. The ratio of plain cloth to printed cloth is in the vicinity of 2|3 : 1|3 though in Nylons, it would be in the vicinity of 60 per cent. in plain and 40 per cent. printed.

There is no special earmarking of prints for the people of this country. The prints they require are mainly of the western style. In Ethiopia, the 36" width is the most popular width. Mention may here be made of the point that the merchants prefer to buy the cloth only if it is in standard lengths of 25 or 30 yards. This is particularly so, because business in the internal market is exclusively done on the basis of pieces and the upcountry people, being rather illiterate, are not ready to purchase any cloth if it is more in price even if there is more yardage in the piece. They feel that then they are probably being cheated by the local sellers.

Varieties in Demand

The following are the popular qualities which are mainly imported from Japan :

Variety	Width	International c.i.f. price per yard.
Serge (selling about 1.5 million yards of the quality 30s x 30s) (75 x 68)	36"	20 cents.
Muslin No. 9 printed and embossed Resin finish (89 reed x 60 pick)	36"	21 "
Nylon Tafetta Plain	36"	40 "

Varieties	Width	International C.I.F. price per yard.
Nylon Tafetta Printed	36"	50 cents.
Satin hand printed 4800 threads	36"	24 "
Satin in 3600 threads plain	36"	17 "
Satin in 8000 threads plain	36"	23 "
Taffeta Plain (Sheoze)	36"	13 "
Nylon Sucker Printed	36"	50 "
Crepe Plain	36"	22 "
Jacquard Brocade 6000 threads	36"	22 "
Crepe Printed	36"	25 "
Satin Acetate 10000 threads	36"	36 "
Fujette	36"	24 "

About 85 per cent. of the imports in Spun Rayon fabrics are in Serge, and in Filament, Satin 3600 threads, plain and printed, and Nylon, Taffeta Plain and printed.

Buying and Booking Seasons

The Textile markets are located at Addis Ababa and Asmara. The local buying season is from **October to May**, and the period from December to April is perhaps the busiest part of the season. The representatives from foreign countries, therefore, visit the place for booking orders during August/September for immediate shipments.

June to September is a dull period for purchases, being the rainy season.

Imports and Import Policy

In order to conserve foreign exchange, the State Bank of Ethiopia, which is controlling the foreign exchange of the country, has made a regulation since some months past that, for the release of foreign exchange for making payments for imports, the Importers have to make an application in a prescribed form. This application must be supported by the proforma Invoice from the foreign suppliers. As soon as the foreign exchange allotment is made, the Importers are required to deposit with the said Bank in Ethiopian Dollars, an amount specified for each class of imports. In the case of Rayon fabrics, including Silk and Art Silk manufactures, piecegoods and yarn, the prior deposit is 125 per cent. of the C.I.F. value. Because of this rule, Importers do not place orders for large quantities. The orders depend on the stocks with them, and fresh orders are placed only when the stocks reach the minimum. Any deposit in

excess of 100 per cent. of the C.I.F. value of the imported goods is refunded to the Importers upon production of satisfactory documentary evidence from the Customs authorities that the goods in question have arrived in the Empire of Ethiopia. The refund of the excess deposit amount takes about a month to a month and a half from the date of import of the goods into the country.

Once the requisite deposit is paid to the State Bank of Ethiopia, an importer can import the commodity in the quantity applied for. As such, there are no direct restrictions on imports, but the restriction exists in the sense that the volume of the trade tends to be at the minimum, as one has to block a huge amount of money. The result is that only those people who have ample finance or have direct arrangements with the Bank can import on a large scale from foreign countries. Due to paucity of capital in general, the general merchants are not able to import the same quantity as before.

There is a further restriction that payment for the imported goods must be made to the country of its origin only. This has been done with a view to controlling the outflow of foreign exchange. The Delegation was given to understand that, in the not distant future, the present import policy would probably be reviewed, and when certain relaxations could be expected to be effected. Goods from free ports are accordingly not easily obtained in Ethiopia.

Out of the total imports by Ethiopia from all over the globe, which are in the vicinity of $4\frac{1}{2}$ million sq. yards per year, the imports from Japan are the largest. Imports from India in 1959 were only of the order of 1,13,000 yards, and out of these, goods worth approximately Rs. 64,000 represented Nylons. Of the total imports of $4\frac{1}{2}$ million sq. yards into Ethiopia, the Delegation has estimated that Spun Rayon imports alone are in the vicinity of $2\frac{1}{2}$ million sq. yards, i.e. approximately 60 per cent., imports of Filament and Synthetic Fabrics being a million sq. yards each.

In Spun Rayon, the most popular and important variety is a 'Serge' which is in the construction of $2/30$ s x $2/30$ s in 36" width with dobby weave on it. Serge is asked in only one type of dobby weave, but in six to seven colours. This quality, mainly supplied by Japan, has occasioned a big set-back even to Muslin No. 9 and 1 and other varieties of Spun Rayon. The price of this quality is about 20 U.S. cents per yard. In Nylons, Glass Nylon, which was exported by India in 1959, has now been completely replaced by a better quality fabric called "Nylon

Taffeta." The average price of the cloth that is exported from Japan varies from 16 to 27 U.S. cents per yard.

(Imports into Ethiopia from various countries, including India, are shown in Appendix "29A-29E").

Ethiopia imports readymade Spun Rayon shirts and trousers on a large scale. The possibility of export of readymade goods should also be studied by the industry.

Customs Duty

The customs duty charged on Art Silk fabrics is at the rate of 60 U.S.A. cents per sq. metre, whereas, on pure silk fabrics, it is 60 per cent. *ad valorem*. In addition to the above, the importers have to pay Federal Tax at the rate of 12 per cent. and Municipal Tax at the rate of 1 per cent. on C.I.F. value. But Japan sends most of its goods to Djibouti, from where the goods have to be brought into the Ethiopian Empire which adds to the cost of the Importer by about 6 per cent. In other words, this additional 6 per cent. becomes a part and parcel of the C.I.F. cost to the Ethiopian Importer and as such, a higher duty is charged for Japanese goods.

(Particulars of Customs Duty are in Appendix 30).

Shipping

India is most favourably placed compared to Japan as far as freight rates are concerned. Further, the Japanese ships do not come to Massawa and Assab as they are out of the way for them. Moreover, the big steamers of Japan cannot be accommodated in the small ports of Massawa and Assab. Japanese shipments are therefore, generally directed to Djibouti, which is an important port for Ethiopia. India is thus in an advantageous position over Japan from the point of view of shipping cost, and the cost to the importer in Ethiopia too is less by approximately 4 per cent. in comparison with Japan. He saves about 3 per cent in transport, because transport charges from Massawa and Assab Ports to Addis Ababa or Asmara are 3 per cent. as against 6 per cent. from Djibouti. He saves another 3/4 per cent., because he has not to pay the Federal Tax of 12 per cent. and Municipal Tax of 1 per cent. on the additional 6 per cent. transport expenses incurred from Djibouti to Addis Ababa.

The time taken for ships to reach Massawa Port from India is eight days while to reach Djibouti from Japan, it takes twenty days.

There are two mail steamers from Japan touching Djibouti every month, whereas, from India, there are four sailings in a month. The freight rate for Art Silk fabrics from Bombay to Djibouti is Rs. 70/- per ton of 40 c. ft. whereas from Bombay to Massawa and/or Assab, the freight rate is Rs. 79/- per ton of 40 c. ft. The exact freight rates from Japan are not known, but they are known to be comparatively higher.

Import Documents

The following documents are required for clearing the goods through the Customs :—

1. Manufacturers' Invoice in quadruplicate duly attested by the Chamber of Commerce.
2. Shippers' Invoice in quadruplicate duly attested by the Chamber of Commerce, giving reference of Import Permit No. and date thereof, obtained by the Importers.
3. Two extra copies of shippers' invoice duly attested by the Chamber of Commerce.
4. Negotiable sets of Bills of Lading and Insurance Policy.
5. Six copies of detailed packing lists showing the contents of each case, and also the square yardage, with gross and net weight of each case.

The Shippers' Invoices have to show separately ex-mill price, shipping charges, freight, insurance premium, handling charges and commission and/or margin of profit, wherever applicable.

Internal Production

As stated already, there are four cotton textile mills in the country. Two of them are producing only yarn and supplying to the handlooms, which are very widely distributed in Ethiopia. The other two (cotton textile) mills have weaving units also. Even so, these two weaving units have an excess capacity of yarn which they supply to the handlooms. The total requirements of cloth, inclusive of Cotton and Rayon cloth, are estimated to be round about 115 million sq. yards per year, 4½ to 5 million sq. yards Rayon fabrics and 110 million sq. yards Cotton fabrics. Out of this 110 million sq. yards of Cotton fabrics, about 75 million sq. yards are locally manufactured (50 million sq. yards by the

handlooms and about 25 million sq. yards by power looms). The balance of 35 million sq. yards is imported. The production of indigenous Cotton cloth is likely to go up in the next two years.

For Rayon fabrics, there are no definite plans till now and it will take some more time for Ethiopia to start the manufacture of Filament and Spun Rayon fabrics on any appreciable scale.

Foreign Trade

Grey cotton piecegoods, drills and jeans; other piecegoods; yarn thread and cotton manufactures, woollen piecegoods, tyres and tubes, motor fuels, paper, pharmaceuticals, foodstuffs, building materials, etc. are the main imports into Ethiopia.

Ethiopia's main exports are Coffee, Hides and Skins, Oil Seeds, Cereals, Pulses, Beeswax, etc.

The following table shows the balance of trade position between India and Ethiopia over the past three years :—

	Rupees in Lakhs		
	Year 1957	Year 1958	Year 1959
	(Jan./Septr.)		
Total exports from India	428	236	194
Total imports into India	1	—	1
Balance	(+) 427	(+) 236	(+) 193

Complaints

The complaints, being more or less the same as from the other places visited by the Delegation, have been dealt with fully in our general observations.

Publicity

Publicity for our goods can be done in the Press. There are two daily newspapers called 'Voice of Ethiopia', and 'Ethiopian Herald' both published in English, the charges for which are one Ethiopian Dollar per column c.m. The mode of publicity is not being mentioned in greater detail, as what has been said in respect of other countries applies to Ethiopia also.

A D E N

General

The colony of Aden has an area of 75 square miles. It is situated at the entrance of the Red Sea from the Indian Ocean.

The Colony was annexed to Britain in 1839 and was part of Bombay Presidency until 1932.

The population of Aden is estimated at about 2,75,000, out of which 15,000 have migrated from India.

Economic Conditions

Aden is essentially a bunkering port and a centre for entrepot trade with the neighbouring regions. There are practically no trade restrictions or Customs barriers. It has no industries. The people are mainly employed in trade, in business houses, in various types of work connected with the port, in the Refinery and in Government service. In contrast to the neighbouring territories, where the standard of living is very low, the standard of living in Aden is fairly high, and consumer goods are available in abundance and also at low prices.

Total imports are valued at £72 million, out of which petroleum products (crude oil) account for £37 million. Of the remainder, food-stuffs account for £11 million and various manufactured goods for £13 million. Since Aden has no industries, as already stated, it imports all its requirements, such as textiles (including rayon), rice, sugar, wheat flour, alcoholic beverages, tobacco (cigarettes as well as unmanufactured tobacco), cement, machinery, etc. It also imports copper, skins (raw) and raw cotton from the neighbouring territories for re-export to other countries.

Internal Means of Communication

Within the Colony, the main mode of transport is the car and the bus. These are adequate. However, for transport from the Colony to the interior (Aden Protectorate and Yeman), the poor man's means of communication is generally the land-rover or the camel. The

important towns in the interior are also connected by air with Aden and a regular air service between them is maintained by the Aden Airways Ltd., which is a subsidiary of the B.O.A.C.

Market

Aden itself is the main market centre. Large quantities of goods are re-exported from here to the surrounding territories, such as the Western Aden Protectorate (main town: Lahej). Eastern Aden protectorate (main towns: Mukalla and Seiyon), Somaliland protectorate (main towns: Hargeisa and Berbera) and Yeman (main towns: San's Taiz and Hodeida).

Method Of Business

The distribution channels are the same as in Iraq and Iran. The importers generally sell their goods to retailers on credit.

(A list of Importers & Merchants is given in Appendix "31")

Terms Of Payment

The terms of payment differ from country to country. Japan insists on irrevocable letters of credit while for goods of Indian and Continental origin transactions are generally on Sight or D.P. basis.

Dress Habits And Consumer Preference

The local people generally use "lungis" whose colours and designs are rather pronounced, while the women wear long shirts and "Burkhas" in black colour. They prefer large designs on a dark background, and look for cheapness and gaudy finish. The quality or the life of the cloth does not seem to be a material consideration with them. Rayon "lungis" from Japan are widely used since they are available at cheap rates.

Silks are now being used in reduced quantities owing to the rapidly increasing popularity of rayons.

Varieties in Demand

The following are the main varieties in demand:—

Japan:

Taffeta: 36 x 25 yds	..	..	Sh. 1.50 to 2 per yard.
Shioze: Plain 36" x 25 yds.	..	..	Sh. 1.00 per yard.
Machine printed -do-	..	..	Sh. 1.00 to 1.25 per yard.
Hand printed -do-	..	..	Sh. 1.25 to 1.50 per yard.

Satin: 36" x 25 yds.	..	..
8000 threads	..	..	Sh. 1.75 to 3.00 per yard.
6000 "	..	..	Sh. 1.50 to 2.15 per yard.
3000 "	..	..	Sh. 0.95 to 1.50 per yard.
Cotton Satin: 26" x 9 yards	..	..	Sh. 1.50 per yard.
Silk Georgette: 45" x 25 yards Plain	..	..	Sh. 3.00 to 10 per yard.
Velvet : 36"	..	..	Sh. 3.00 per yard.
Muslin (spun rayon) 60 to 68 threads			
Plain	..	..	Sh. 0.78 per yard
Printed	..	..	Sh. 0.95 per yard.
Lungis (spun rayon) Spray finish	..	..	Sh. 80 to 240 per score.
Lungis (art silk)	..	..	Sh. 20 to 80 per pair.
Nylons (several varieties)	..	..	Sh. 2 to 12 per yard.
Handkerchieves (silk)	..	..	Sh. 2 to 5 per pice.

India:

Dress Material (silk) 45" width	..	..	Sh. 12 to 20 per yard.
Bush Shirts (raw silk)	..	..	Sh. 30 to 40 each.
Brocade sarees (with silk), gold and silver thread)	..	..	Sh. 58 to 300 each.
Scarves—soft pure silk: (36" x 2 yards)	..	..	Sh. 24 to 27 each.
Tissue — 1.5 per cent gold thread	..	..	Sh. 40 to 100.
Handkerchieves — Murshidabad and Kashmir (36" x 36")	..	..	Sh. 10 to 15 each.
Lungis — silk (29" x 4½ yds.)	..	..	Sh. 27 each.

France

Chiffon (45" width)	Sh. 5 to 7 per yard.
Velvet (36" width)	Sh. 6 per yard.

England

Glazed cotton	Sh. 4 to 6 per yard.
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Other Varieties

Printed Nylon Georgette	Sh. 6.5
Nylon Plain	Sh. 4.25
6000 Satin Plain	Sh. 1.50
8000 Satin Plain	..	..	Sh. 1.90
36" Satin Plain 3600	..	..	13.5 U.S. cents.
36" Satin Plain 6000	..	..	21.0 " "
36" Satin Plain 8000	..	..	25.0 " "
Rayon Plain Shioze Nylon Finish	..	..	19.0 " "
Spun Rayon — 36" Satin Printed	..	..	22.0 " "
Spun Back Satin 28" on 9 yds. roll	..	..	17.0 " "
Black Colour Spun Satin	..	..	13.0 " "
44" Glass Nylon Plain	..	..	18 to 20 "

Pure Silk Crepe and Satin are also in vogue there.

Readymade Garments:

Aden also imports large quantities of readymade rayon garments, etc. These include Nylon and Decron shirts, Nylon frocks for children, Rayon lungis, Spun rayon vests, Nylon free-size stockings, printed Nylon scarves and handkerchieves, Rayon jerseys, Art Silk blouses and other miscellaneous products.

In territories like Aden, where the general level of income is low and the tailoring is not only unsatisfactory but comparatively expensive, the advisability of marketing readymade rayon garments should be given some serious consideration.

Buying & Booking Season

There is generally intense business activity on the eve of important festivals, such as Id, Christmas, etc. There are no clearly marked out business seasons as such. This is also so, as the Aden market does not cater to their own consumption, but caters mainly to the needs of neighbouring countries like Aden Protectorate, Yeman, Somaliland and other countries.

Imports And Import Policy

There are generally no restrictions on imports, specially from the Commonwealth countries, including India. Restrictions, however, exist on imports from particular Communist countries and in respect of a few particular commodities.

Pure Silks—In recent years there has been a rapid decline in the import of Silks into Aden.

(The statistics of Imports from each country are in Appendix "32A")

The main reason for decline is the growingly overwhelming popularity of Rayons. Hence the scope for export of Indian silks to Aden is somewhat limited.

Rayons—Large quantities of Rayons are being imported into Aden, mainly for internal consumption and, to some extent, also for re-export to the neighbouring territories. The principal supplier of Rayon fabrics is Japan, accounting for over 70 per cent of total imports. The other supplying countries are mainly France, Syria and India.

(Statistics of Imports may be seen in Appendix "32A-32B")

The break-up of the imports for distribution is estimated to be 40 per cent re-exported to Yeman, 16 per cent Aden Protectorate, 35 per cent British and Italian Somaliland and 9 per cent internal consumption.

Japan has been able to capture Aden market mainly because the prices of her fabrics are low and the finish is satisfactory. The fabrics are well-packed in cases preceded by full length samples in attractive folders. The claims are also settled quickly.

On the other hand, Indian prices are higher. The packing is also poor which results in damage to the contents. The settlement of claims is a painfully long affair.

The demand between spun rayon fabrics and Filament Rayon fabrics during the year 1959, was 40/60 per cent respectively. During the year 1960 the demand of spun rayon is estimated around 50 per cent as there is a carried over stock of Filament rayon. It is very essential for India to capture something out of this 50 per cent portion of imports of Spun rayon varieties.

(The qualitywise break-up of exports from India & Japan is given in Appendix "33A-33C")

Shipping

Aden is well connected by sea and air to all the countries. Not less than 6000 ships call at Aden annually for bunkering.

Complaints

The main factor which has affected the import of Indian rayons is the high price of the Indian goods in comparison to the Japanese product. Japan has always maintained its market because of price, good finish, packing and regular shipment. Japan also gives supplies of full length samples in attractive folders, by Air Mail, which enables the importers to sell the goods even before they arrive.

Indian exporters would also do well to take good care of packing. Goods from Japan and other countries come very well packed in new wooden cases bound securely with iron strips. The pieces are wrapped in attractive paper, well stamped with markings relating to quality, yardage, width and the name of the importer.

Some importers complain that Indian exporters do not entertain claims immediately. They merely ask the importers to approach the manufacturers. On the other hand, the Japanese exporters try to settle the claims immediately, and then claim reimbursement from the manufacturers.

Publicity

General publicity, via. the Cinema slide and advertisement through newspapers, is practised in Aden also, but the general assessment is that its effectiveness is not as pronounced in the Colony as elsewhere. Personal contacts, such as visits by Indian representatives, are, therefore, considered very essential. By reason of her proximity, India has certain advantages over Japan in this respect.

PART III

APPENDIX "1".

ITINERARY OF THE DELEGATION SPONSORED BY THE SILK & RAYON TEXTILES EXPORT PROMOTION COUNCIL, BOMBAY, TO WEST ASIAN AND AFRICAN COUNTRIES.

IRAN

Teheran—1960

- April 12 Call on the Ambassador, H.E. Mr. T. N. Kaul. Visit to the Textile Exhibition at Indian Display Centre.
- April 13 Call on the Minister of Commerce, Government of Iran. Visit to main Bazar for survey of Textile Trade. Meeting with leading Indian Importers of Art Silk Textiles, at the residence of the Commercial Secretary, Government of India. Visit to Indo-Iranian Club.
- April 14 Visit to the Bazar and meeting the Iranian Importers of Textiles. Meeting with representatives of Iranian Press. Reception by Delegation at Indian Display Centre, and display of samples.
- April 15 Meeting with the Importers of Art Silk Textiles. Visit to wholesale and retail markets, collecting competitors' samples, etc.
- April 16 Visit to wholesale and retail markets, and meeting with Merchants.
- April 17 Call by the Merchants on Delegates, and meeting them both collectively and individually.

IRAQ

Baghdad

- April 18 Call on the Secretary, Commercial Secretariat, Embassy of India. Call on the Ambassador H.E. Mr. I. S. Chopra. Visit to Retail Textile Market. Call on leading Importers of Art Silk Textiles.

Meeting with the President and Members of The Baghdad Chamber of Commerce, and display of samples carried by the Delegation.

- April 19 Call on leading Importers and Merchants of Art Silk Textiles.
Lunch with the President of The Baghdad Chamber of Commerce.
- April 19 Discussions with Importers and Merchants of Silk and Art Silk Textiles, at the Regional Office of the Cotton Textiles Export Promotion Council.
- April 20 Call on the President and Members of the Baghdad Chamber of Commerce.
Meeting with leading Importers of Art Silk Textiles.
Call on H.E. the Minister for Trade, Government of Iraq.
Call on Director General and Assistant Director General of Imports and Exports, Government of Iraq.
Call on Importers of Art Silk Textiles.
Cocktail Party by the Delegation at the residence of the Second Secretary (Commercial), Embassy of India.
- April 21 Call on Director General, Federation of Industries.

LEBANON

Beirut

- April 22 Call on the Charge D'Affairs, Government of India.
Call on the President, Beirut Chamber of Commerce and Industry and meeting with the Members of Chamber of Commerce.
Call on the Director General and Assistant Director, Ministry of Commerce, Government of Lebanon.
Visit to Market.
Meeting the Merchants at the Office of the Lebanon Chamber of Commerce and Industry and display of samples.
- April 23 Meeting the Importers and Merchants in Silk and Art Silk Trade, and visit to "Free Zone Area".
Visit to Market and meeting the Merchants.
- April 24 Meeting Merchants at Carlton Hotel.

SUDAN

Khartoum

- April 25 Call at the Indian Embassy's Office.
Call on H.E. the Minister of Commerce, Industry and Supply.
Call on H.E. the Minister of Foreign Affairs.
Call on H.E. the Permanent Under Secretary, Ministry of Finance.
- April 25 Visit to the Textile Market at Khartoum and Omdurman.
- April 26 Meeting at the Sudan Chamber of Commerce and display of samples.
Visit to the Textile Market at Omdurman.
Reception to the Delegation at the residence of Charge D'Affairs.
- April 27 (GROUP II of the Delegation composed of Sarvashri C. K. Patel, V. C. Gandhi and V. J. Radia left for Entebbe—Kampala — in the early morning.)
GROUP I. Display of samples and meeting the Indian Importers of Silk and Art Silk Textiles at the Office of the Indian Embassy.
Visit to the Textile Market at Khartoum along with the Representative of Cotton Textiles Export Promotion Council.
Meeting with the Mayor of Khartoum.

KENYA

Nairobi

- April 28 Meeting with the Silk and Art Silk Textiles Merchants at the New Stanley Hotel.
Visit to Market for survey.
- April 29 Meeting with the Press Representatives at New Stanley Hotel.
Call on the Commissioner for India.
Call on Mr. L. W. Aldous, East Africa, High Commission.
Visit to Market.
Meeting at the Indian Chamber of Commerce and display of samples.

GROUP II of the Delegation composed of Sarvashri C. K. Patel, V. C. Gandhi and V. J. Radia returned to Nairobi from Kampala.

- April 30 Call on the Hon'ble Dr. J. G. Kiano, Minister for Commerce and Industry.
Meeting the Importers and Merchants of Silk and Art Silk Textiles.
Meeting with the Under Secretary (Commercial) and Ag. Director, Trade and Supply.
Meeting the Silk and Art Silk Textiles Merchants and Commission Agents.
Sundowner (Cocktail) at the residence of Second Secretary (Education).
- May 1 GROUP II of the Delegation composed of Sarvashri V. C. Gandhi and V. J. Radia left Nairobi for Zanzibar.
- May 1 GROUP I. Call on Merchants — individually.

TANGANYIKA

Dar-Es-Salaam

- May 2 Call on the President, Indian Merchants Chamber, Dar-Es-Salaam.
Meeting with the Members of the Indian Merchants Chamber and display of samples.
- May 3 Market Survey.
Meeting at the Office of the Indian Merchants Chamber and display of samples.
GROUP II of the Delegation composed of Sarvashri V. C. Gandhi and V. J. Radia returned from Zanzibar.
- May 4 Call on Silk and Art Silk Textiles Merchants and Manufacturers' Representatives.
Visit to the Market and display of samples.

KENYA

Mombasa

- May 5 Call on the Trade Commission for India.
Discussions with the Representative of the Silk and Rayon Textiles Export Promotion Council and visit to the Market for survey of trade.

Meeting at the Indian Merchants Chamber and display of samples.

Reception to the Delegation at the residence of the Trade Commissioner for India.

- May 6 Meeting the Silk and Art Silk Merchants, Commission Agents and/or Manufacturers' Representatives.
Visit to the Market and collecting samples of Competitors-cum-display of samples at the Office of the Indian Merchants Chamber.
- May 7 Visit to the Market, meeting Merchants and display of samples.

NAIROBI

Nairobi

- May 9 Visit to the Market, collection of Competitors' samples, etc.
Lunch with the President, Indian Chamber of Commerce.
Visit to the Market and meeting Silk and Art Silk Importers, Commission Agents and others.
Sundowner (Cocktail) by the Delegation.
- May 10 Visit to the Merchants.
- May 10 Lunch with Dr. J. G. Kiano.
Visit to the Market.

MAURITIUS

Mauritius

- May 12 Call at the Office of the Commissioner for India.
Meeting with the Commissioner for India.
Conference with the Silk and Art Silk Textiles Merchants and Importers and display of samples.
Lunch with Members of the Mauritius Textile Merchants' Association.
Call on Hon'ble Minister of Finance, Government of Mauritius.
Discussions with individual Traders and interested parties.
At-Home at Commissioner's residence.
- May 13 Interview of the Delegation by the Representatives of the Mauritius Broadcasting Station at Park Hotel.
Market Survey.

PORT LOUIS

Port Louis

- May 13 Call on Hon'ble Minister for Industry, Commerce and External Communication, Government of Mauritius.
Conference with Press Representatives.
- May 14 Market survey at Rose Hill, Curepipe and Port Louis.

ETHIOPIA

Addis Ababa

- May 16 General Discussions with the Second Secretary (Commercial), Embassy of India, regarding Trade.
Meeting with the leading Importers, Silk and Art Silk Textiles.
- May 17 Call on Manager, State Bank of Ethiopia.
Call on President and Secretary General of the Chamber of Commerce.
Lunch with the Indian Textiles Merchants.
Meeting with Importers and Wholesalers, Silk and Art Silk Textiles.
Dinner with Second Secretary (Commercial), Embassy of India.
- May 18 Visit to the Wholesale Market.
Visit to Indo-Ethiopian Textile Mills and lunch with Shri S. K. Birla.
Display of samples and meeting the Silk and Art Silk Textiles Merchants in the Office of Commercial Secretary.
Reception by the Delegation.
- May 19 Call on the Minister for Commerce and Industry, Government of Ethiopia.
Visit to the Market and meeting Merchants.

Aden

- May 20 General Discussions with the Registrar, Commission for India.
Visit to the Market for survey and Textile Trade.
- May 21 Call on the Commissioner for India.
Visit to the Market and meeting Importers of Silk and Art Silk Textiles.

- May 22 Individual call on Merchants.
- May 23 Meeting with the Trade Commissioner for Aden.
Meeting the Textile Merchants at the Chamber of Commerce, Aden.
Meeting Commission Agents in Textile Trade.
Visit to the Market and meeting the Merchants and collecting samples.
- May 24 Meeting Merchants collectively and individually.

GROUP II

(Composed of Sarvashri C. K. Patel, V. C. Gandhi, and V. J. Radia).

Kampala

- April 27 Arrival at Entebbe Air Port, from Khartoum.
Visit to the Wholesale and Retail Markets.
Meeting Importers of Silk and Art Silk Textiles.
Meeting with the President and Members of the Indian Merchants Chamber, and display of samples carried by the Delegation.
- April 28 Call on the Asstt. Commissioner, Government of India.
Call on the Minister for Commerce, Industry and Supply.
Departure for Jinja — Meeting with the President and Members of the Eastern Province Chamber of Commerce.
- April 29 Departure for Nairobi.

GROUP II

(Composed of Sarvashri V. C. Gandhi and V. J. Radia).

Zanzibar

- May 1 Arrival at Zanzibar Airport, from Nairobi.
Meeting with the President, Indian Merchants Chamber.
Meeting with the Importers and Merchants of Silk and Art Silk Textiles.
- May 2 Call on the Resident, and also on the Secretary, Department of Finance.
Visit to the markets.
Display of samples carried by the Delegation.
- May 3 Visit to the market, meeting the Importers and Wholesalers of Silk and Art Silk Textiles.
Departure from Zanzibar to Dar-es-Salaam.

APPENDIX "1A"

PARTICULARS OF PROVISIONAL BOOKINGS AND ENQUIRIES RECEIVED BY THE DELEGATION SPONSORED BY THE SILK & RAYON TEXTILES EXPORT PROMOTION COUNCIL, BOMBAY, DURING ITS TOUR TO WEST ASIAN AND AFRICAN COUNTRIES.

Name of the Mill.	Quantity and brief description of goods. (Yards)	Destination
1. Paragon Textiles Mills, Bombay.	10,000 of Nylon New Padmini	Khoramshahr
2. Ashok Silk Mills, Bombay.	25,000 of Taffetta plain dyed	Khoramshahr
	25,000 of Dyed Parmatta Cotton back	Beirut
	6,000 of Parmatta	Khoramshahr
	47,000 of Parmatta, shirting & Taffetta	Basrah
	1,000 of Amar Satin	Zanzibar
3. Kanti Silk Mills, Surat.	20,000 of Art Dress Material	Khoramshahr
	50,000 of Art Dress Material	Khoramshahr
4. Surat Vankar Sahakari Sangh Ltd., Surat.	10,000 of Glass Nylon "Suvarna"	Khoramshahr
5. Hathiwala Silk Mills, Surat.	20,000 of Sleeves Lining	Beirut
6. Jaifabs Rayon Industries Private Ltd., Bombay.	40,000 of Half Crepe print	Port Sudan
	10,000 of Satin print	Basrah
	1,000 of Art Dyed Crepe	Zanzibar
7. Shree Laxmi Silk Mills, Bombay.	2,000 Brosso Q No. 361	Basrah
	300 of Bush Shirting	Zanzibar
	12,000 of Shantung Poplin	Port Sudan

Name of the Mill.	Quantity and brief description of goods. (Yards)	Destination
8. Shree Shakti Mills Ltd., Bombay.	15,000 of Shirting & Sharkskin	Khoramshahr
	1,28,000 of Brosso, Crepe, Taffetta Ptd., Lining etc.	Basrah
	50,000 of Half Crepe	Port Sudan
	4,000 of Brocades & Check Taffeta	Mombassa
	8,000 of Crepe Ptd., Taffeta & Shirting	Addis Ababa
9. Sassoon & Alliance Silk Mills Co. Ltd., Bombay.	5,000 of Dented shirting	Khoramshahr
	10,000 of Jacquard	Basrah
10. D. V. Industries, Bombay.	1,14,000 of Crepe, Half Crepe, & other qualities	Port Sudan, British East Africa & Mauritius.
G. Total	6,13,800	

Enquiries Received

For Bharat Velvet Co.,

3,00,000 yds. Velvet fabric in French Martin finish 36" @ Rs. 3-6-0 per yd. C.F.C. 3 per cent. from Maison Indienne Undernomal, Beirut.

From M/s. Gari Lal Vadhva,
P.O. Box No. 831,
Teheran (Iran)

25,000 yds. of Nylon Dyed Pigment Printed in 35/36" width in any good design. Packing in pieces of 20 to 25 yards each, well packed in strong wooden cases with double gunny cover.

APPENDIX "2"

**TABLE SHOWING COUNTRYWISE IMPORTS OF RAYON FABRICS
FABRICS, AND PER**

	Iran	Iraq	Lebanon	Sudan
†Total imports of Art Silk Textiles from all over the world during 1958 ..	Figures not available	70,918	Figures not available	7,554
‡India's share in above im- ports	"	10	"	27
Percentage of India's share in imports ..	"	.0148	"	.36
†Total imports of Art Silk Textiles from all over the world during 1959 ..	70,000	-82,465	"	15,216
‡India's share in above im- ports	2,600	—	"	786
‡Percentage of India's share in imports ..	3.71	—	"	5.17
Estimated Break up of Spun Rayon Textiles im- ports in 1959	1/3	2/3	1/2	2/3
Estimated Break up of Rayon filament and Syn- thetic Textiles in 1959 ..	2/3	1/3	1/2	1/3
Per capita imports in 1959	Rs. 3.50	Rs. 12.70	—	Rs. 1.30
Estimated average price of A.S. Textiles imports in 1959	Rs. 1.50	Rs. 1.37	—	Rs. 1.00

Notes:— † Value converted into Indian Rupees and in Thousands.
* Art Silk & Synthetic.
‡ Figures relate to period 11th Septr. to 10th Septr.
- Licences issued for year 1959.

(WITH PROPORTION OF SPUN RAYON & FILAMENT & SYNTHETIC CAPITA IMPORTS).

EAST AFRICA						
Kenya	Tanganyika	Uganda	Zanzibar	Mauritius	Ethiopia	Aden
*35,090	*21,673	*20,581	—	4,814	†6,528	39,563
728	40	84	—	1,561	†54	14,116
2.07	.18	.41	—	32.42	†.83	35.68
*21,927	*20,007	*16,604	—	—	—	30,006
445	83	159	—	—	—	4,958
2.03	.42	.96	—	—	—	16.53
17/20	9/10	4/5	4/5	1/3	2/3	1/2
3/20	1/10	1/5	1/5	2/3	1/3	1/2
Rs. 3.50	Rs. 2.20	Rs. 2.90	—	—	—	Rs. 109.10
Rs. 1.00	Rs. 0.82	Rs. 1.05	—	—	Rs. 1.25	—

APPENDIX "3"

LIST OF IMPORTERS AND COMMISSION AGENTS OF SILK AND RAYON TEXTILES — TEHERAN

Morteza Mostafa Hashemi ..	..	Bazar Bein-ul Harameen Seraye Bank, Teheran. (Tel. No. 28885).
Dr. Ali Bonakdarpour & Co. ..	..	Seraye Sina, Teheran. (Tel. No. 28791).
Mofarrah & Co., Incorporated ..	..	Seraye Haji Molla Ali, Teheran (Tel. No. 27798).
Haroon Yon Tobian ..	..	Seraye Amir, Teheran. (Tel. No. 25105).
Haj Mahmood Kashani ..	..	Seraye Ferdows, Teheran. (Tel. Nos. 24672, 42453, 44311, 83346)
Haj Mirza Alinaghi Kashani ..	..	Seraye Ferdows, Teheran.
Sayed Mahmood Lajevardi	}	.. Seraye Hafez, Teheran.
Sayed Akbar Lajevardi		.. (Tel. No. 50091)
Haj Mirza Alinaghi Kashanchi ..	..	Seraye Hafez, Teheran. (Tel. No. 22448)
M|s. Ipackchian ..	..	Seraye Amir, Teheran.
M|s. Aghasipour & Co.		12 Fisherabad, Teheran.
Mr. Abdel Hossein Ketabi ..	..	Seraye Amir, Teheran. (Tel. No. 20999).
Mr. Habib-ullah Mofid ..	..	Sherkat Bazargani Faedaba- Masooliat-e-Mahdood, Nasser Khosrow, Passage Moattar, Teheran. (Tel. No. 51656)
Sherkat Sahami Saderat va Varedat-e- Keshvar ..	..	Seraye Omid, Teheran.
Mr. Mohsin Schalchilar ..	..	Bazar Soltani, Teheran. (Tel. No. 29422)
Boyouk Ipektchi, Seh Dalan Malik	..	Teheran (Tel. No. 21572).

Arien Trading Company	..	..	Saraye Hafez, Teheran. (Tel. No. 23854).
Haji Karbassian	..	..	Seraye Ettihad, Teheran.
Sherkat Sahami A.C.A.	..	..	Kh. Istanbul, Teheran. (Tel. No. 35564).
Owring Co. Ltd.	..	..	Seraye Sina, Ave. Bouzarjomehri Teheran.
Benyamin Vesta	..	..	Seraye Amir, Teheran. (Tel. Nos. 41851, 29930, 302130).
Sayed Abbass Darbandi	..	..	Kuche Chahar Soo, Teheran. (Tel. No. 20840).
Import Export Co.	..	..	Seraye Omid, Teheran.
*M|s. Kishori Lal Anand	..	..	Seraye Shams, Teheran. (Tel. No. 23781).
*Seth Narain Dass Nand Lal	..	..	Timche Hajib-ud-dowleh, Teheran. (Tel. No. 21294).
*Sardar Saheb Sardar Mehr Singh Chadda	..	..	Seraye Omid, Teheran. (Tel. No. 23662).
*Bazargani Sham	..	..	Seraye Omid, Teheran. (Tel. No. 25303).
*Sardar Harbans Singh Shahpuri	..	..	Seraye Saffari, Teheran. (Tel. No. 25449).
*Sardar Mehtab Singh	..	..	Seraye Saffari, Teheran. (Tel. No. 23767).
*Seth Thakurdas Tikam Dass	..	..	Seraye Saffari, Teheran. (Tel. No. 27943).
*Seth Gagal Mall Hott Chand	..	..	Seraye Paidar, Teheran. (Tel. No. 22977).
*Seth Girdhari Lal	..	..	Timche Jagib-ud-dowleh, Teheran. (Tel. No. 41812).
*Firooz Madan	..	..	Persind Ltd. Kh. Shah Reza, Teheran. (Tel. Nos. 65560, 67635).

*Satara Commercial Corporation	..	Seraye Jawaheri, Teheran. (Tel. No. 22968).
Sherkat Tazamoni Reza va Mehar	..	Baradaran Moghareh, Teheran Bazar Seraye, Jadid No. 2, Teheran.
A. Arastoozad .. ..	..	P.O. Box No. 1444, Teheran.
Sherkat Tazamono Haji Ali ..	..	Naghi va Mohammad, Bera- dern Kashani, Seraye Fer- dows, Teheran.
Haji Mirza Abdullah Moghadam	..	Seraye Chitsaz, Teheran.
Haji Abbas Akhavan .. ..	..	Seraye Chitsaz, Teheran.
Mir Mohamood Mirzadeh ..	..	P.O. Box No. 16, Teheran.
+ M|s. Atef Co. Ltd. (Mr. Eshaghpour)	..	Seraye Amir, Teheran.
+ Arman Trading Co. Ltd. ..	..	Seraye Amir, Teheran.
+ Sherkat Neshi George & Edward Nissan	..	Seraye Jawaheri, Teheran.
+ Haji Hassan Khosrowshahi ..	..	Kh. Ekbatan, Teheran.
+ Ezra Salman Shamash ..	..	Seraye Amir, Teheran.
+ Naim H. Dalal .. ..	..	P.O. Box No. 668, Teheran.
+ Joseph Albert D. Tawfik ..	..	28 Maiden Sapat, P.O. No. 985, Teheran.
+ Iran Iraq Corporation ..	..	Seraye Hafeez, Teheran.
+ Haji Mohamed Taghi Ettefash	..	Seraye Amir, Teheran.
**Giri Lal Wadhava .. ..	..	C|o. Bazargani Sham, Seraye Omid, Teheran.

Note:—

* Indian firms resident in Iran

+ Commission Agents.

** Brokers.

APPENDIX "4A"

EXPORTS OF ART SILK & RAYON FROM JAPAN TO IRAN

Article	Year 1957 Quantity	Value in Yen (Unit 1000)
Year 1957		
Spun Rayon Yarn ..	5,37,900 Lbs.	99,253
Rayon Filament Fabrics ..	2,01,90,048 Sq. Yds.	13,51,613
Spun Rayon Fabrics ..	1,50,17,083 „	10,73,131
Year 1958		
Rayon Filament Yarn ..	5,90,023 Lbs.	95,063
Spun Rayon Yarn ..	4,56,200 „	68,388
Rayon Filament Fabrics ..	2,99,97,039 Sq. Yds.	18,51,770
Spun Rayon Fabrics ...	2,81,76,538 „	18,51,095
Year 1959		
Rayon Filament Yarn ..	2,02,539 Kg.	72,111
Spun Rayon Yarn ..	1,85,296 „	58,569
Spun Rayon Fabrics ..	150,83,706 S.M.	11,68,641
Rayon Filament Fabrics ..	247,33,293 S.M.	18,48,483

(Source: Embassy's Office at Teheran)

APPENDIX "4B"

EXPORTS OF ART SILK & RAYON FROM WEST GERMANY TO IRAN

Year 1957		
Article	Quantity in 100 Kgs.	Value in DM 1000
Rayon & synthetic fibres also twisted	817	2120
Tissues from silk synthetic fibres	1461	3507
Tissues from artificial wool and synthetic fibre	10265	11094
Knitting wares silk, chemical fibre	62	582
Other dresses silk chemical fibres	102	79

Year 1958		
Rayon synthetic threads also twisted	816	1986
Spinnings from art wool synthetic fibres	229	468
Tissues silk, rayon & synthetic threads	1584	3772
Tissues from art wool synthetic fibres	8559	9111
Knitting goods silk, chemical fibres	53	601
Other dresses—silk chemical fibres	116	880

Year 1959		
(January to September)		
Rayon synthetic threads also twisted	1422	1928
Spinning of art wool synthetic fibres	120	133
Tissues of silk rayon synthetic threads	1763	4067
Tissues of art wool & synthetic fibres	8566	8521
Knitting goods silk, chemical fibres	43	332
Other dresses silk, chemical fibres	64	418

(Source : Embassy's Office at Teheran)

APPENDIX "4C"

EXPORTS OF ART SILK & RAYON FROM ITALY TO IRAN

Year 1958

Article	Quantity (in 100 Kgs.)	Value in 1000 Liras
Yarns of artificial and synthetic fibres and their waste	3714	623,4
Cloth of artificial and synthetic fibre pure or mixed	1759	482,8
Hosiery of artificial and synthetic fibres ..	33	51,5

Year 1959

Article	Quantity (in 100 Kgs.)	Value in million Liras
Yarns of artificials and synthetic fibres and their waste	6601	998.7
Textiles of artificial and synthetic fibres pure or mixed	2127	577.2
Hosiery of artificial & synthetic fibre ..	41	64.3

(Source : Embassy's Office at Teheran)

APPENDIX "5A"

INDIAN EXPORTS TO IRAN DURING THE YEAR 1958

RAYONS	Value in Rs.
Crepe	162,375
Doria	6,721
Satin	134,829
Taffeta	132,727
Sharkskin	20,457
Brocade	3,629
Shirting	63,210
Poplin	2,207
Parmatta	41,746
Jacquard	2,876
Rayon piecegoods (n.e.s.)	919,445
	1490,222
Rayon Manufactures	
SYNTHETIC FIBRE FABRICS	
Nylon Georgette	19,912
Nylon piecegoods (n.e.s.)	153,037
	172,949
Grand Total for Rayons:	1663,171
SILK FABRICS	
Sarees	4,137
Piecegoods	860
	4,997
SILK MANUFACTURES	
Scarves	8,938
	8,938
Grand Total for Silks	13,935

(Source: The Silk Rayon Textiles Export Promotion Council)

APPENDIX "5B"

INDIAN EXPORTS TO IRAN DURING 1959

RAYON FABRICS						Value in Rs.
Crepe	..	..	..	..	..	1,40,450
Flat Crepe	..	..	..	..	..	15,177
Satin	..	..	..	..	..	2,03,175
Taffeta	..	..	..	..	..	37,448
Brocade	..	..	..	..	..	53,181
Parmatta	..	..	..	..	..	6,240
Kinkhab	..	..	..	..	..	9,958
Poplin	..	..	..	..	..	59,788
Rayon Fabrics (NES)	..	..	..	..	..	11,35,608
				Total		<u>16,61,025</u>
NYLON						
Satin	..	..	..	..	..	53,766
Nylon Fabrics (NES)	..	..	..	..	..	9,34,942
				Total		<u>9,88,708</u>
				Grand Total for Rayons		<u>26,49,733</u>
MANUFACTURES					..	Nil
SILK FABRICS					..	Nil
MANUFACTURES					..	
Stoles	..	..	..	..	..	4,817
Shawls	..	..	..	..	..	2,331
				Total		<u>7,148</u>
				Grand Total for Silks		<u>7,148</u>

(Source : The Silk & Rayon Textiles Export Promotion Council)

APPENDIX "5C"

JAPANESE EXPORTS TO IRAN DURING 1959

RAYON	Value in U.S. Dollars				
Flat Crepe	1,32,000
Georgette Crepe	1,53,000
Orient Crepe	62,000
Befany	57,000
Fancy Weave	2,21,000
Fujette	3,23,000
Sheer Crepe	3,71,000
Palace	1,14,000
Satin	18,09,000
Shioze	4,35,000
Taffetta	2,28,000
Twill	2,10,000
Voile	8,51,000
Habutae	2,50,000
Satin Crepe	5,000
Pique	2,000
Rayon Fabrics (NES)	10,56,000
				Total	62,79,000
SPUN RAYON					
Amunzen	4,000
Fancy Weave	1,31,000
Gabardine	77,000
Gingham	15,000
Linnet	1,00,000
Muslin	13,23,000
Poplin	45,000
Serge	2,32,000
Shirting	1,19,000
Tropical	2,04,000
Suiting	10,35,000
S.R. Fabrics (NES)	24,000
				Total	33,09,000

		Value in U.S. Dollars
SYNTHETIC FIBRE FABRICS		
Nylon Fabrics .. .. .	.. .. .	4,19,000
Synthetic Fabrics NES .. .. .	.. .. .	3,000
Vynylon Fabrics .. .. .	.. .. .	1,000
	Total	<u>4,23,000</u>
	Grand Total	<u>100,11,000</u>

(Sources: The Silk & Rayon Textiles Export Promotion Council)

APPENDIX "6"

LIST OF SILK & RAYON TEXTILES IMPORTERS, MERCHANTS AND COMMISSION AGENTS IN BAGHDAD

Messrs. Alrahim Trading Co., Eastern Bank Building, (Mr. Sami & Mr. M. Al- Rahim) Baghdad.	Messrs. * Mohammed Hassan Sufar, Souq Menahaim Danial 16|246, Baghdad.
„ *Amal Trading Co., Hamid Khayat, Damarchi Building, Baghdad.	„ *Mohammed Jaffar Al Kamali, Khan Makki Bahiya, Baghdad.
„ Fadhil Shmara, Khan Al Cherkesi Al Kabir, Baghdad.	„ *Mohammed Jawad M. H. Hendi, Khan Dalla Al Kabir, Room 33, Baghdad.
„ Gourji C. Bekhor, New British Bank, Building, 2nd Floor, Baghdad.	„ *M. M. Al Jawad Trading Co., (Mr. M. M. Aljawad) Dukair Bldg., Baghdad.
„ Hashim Ahmed Al Behbahani, Behbahani Building, Baghdad.	Messrs. Abdul Wahid Al Khudairi, Post Box No. 14, Baghdad.
„ Haj Moh'd Ridha Fouzi, Khan Al Cherkesi, Baghdad.	„ Eliaho Masri, Safafir, Baghdad.
„ Jaffer E. H. S. D. Al Muscaty, Khan Dalla Al Kabir, Baghdad.	„ Gourji Shaoul R. Balboul, Khan Dalla Al Kabir, Baghdad.
„ Menashi Sahoul Shashoua, Khan Dalla Al Saghir, Siffafir, Baghdad.	„ Hamid Makki Shubber Khan Al Makhzoom, Baghdad.
„ Mohammed Ali Mohammed Hussan, Khan Al Hariri, Siffafir, Baghdad.	„ Hashim A. B. Altayar, Khan Al Gumrug 24 8, Baghdad.

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| Messrs. Jaffer M. Ali Al Wakil,
Khan Kubba Al Kabir,
Baghdad. | Messrs. Rashid Roumani & Sons.,
Khan Al Hariri, Saffafir,
Baghdad. |
| „ Mhamoud Mhaoush
Al Qubaisi,
Khan Al Zeror,
Baghdad. | „ *Said Mehdi Al Haairy,
Khan Al Murradeyah Al
Kabir, Baghdad. |
| „ M. Jawad M. Ridha,
Khan Al Cherkesi
Al Kabir, Baghdad. | „ Shakir Abdul Sahib,
Shakarchi Building,
Baghdad. |
| „ *Mohammed Ali Sadiq
Jaffar,
Fawzi & Sherif Bldg.,
Baghdad. | „ Yassin & Selim Bitar,
Khan Al Cherkesi Al
Kabir,
Baghdad. |
| „ Mohammed Hussain &
Nor Al Din Al Haideri,
Al Haideri Store,
Dainial Market,
Baghdad. | „ Yousif Rashid Atrackchi,
Souq Danial Room No. 21,
2nd Floor,
Baghdad. |
| „ Mohammed Jaffar,
Abdul Majid Al Kadhomi,
Murradeya Market,
Baghdad. | „ Shakir Mohamoud Al
Kanbar,
Murradeyah Market,
Baghdad. |
| „ Mohammed Majid Al
Katibi,
Khan Al Pasha Al Kabir,
Baghdad. | „ General Agencies Co.,
Ghareeb Jan Building,
Shorjah, Baghdad. |
| „ Hassan Fouzi,
Near Cherkesi Khann,
Baghdad. | „ Noori & Abdul Amir Al
Baldawi,
Souq Al Beyadh,
Baghdad. |
| „ Mohammed Saeed
Mohammed,
Hashim Saeed Ali,
Khan Al Cherkesi,
Baghdad. | „ Al Haj Mohammed
Shaaban,
Murradeya Market,
Baghdad. |
| „ Mustafa Mohammed
Toraqchi,
Khan Kubba,
Baghdad. | „ Ghazi Hussan Habasha,
Khan Dalla Al Kabir,
Baghdad. |

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| Messrs. Munir Guma Mohammed
Al Ani,
Souq Al Helys,
Baghdad. | Messrs. Al Haj Hassan Al Ali Al
Hully,
Murradeya Market,
Baghdad. |
| „ Haji Ali Al-Jabiri,
Damerchi Building,
Baghdad. | „ *M. A. Hamadani,
Bebbahani Bldg.,
Baghdad. |
| „ *Kadhum Husain
Al-Qubbanchi,
Khan Dalla Al Kabir,
Baghdad. | „ Abdul Kadir Sherif,
Souq Al Murradeyah,
Baghdad. |
| „ * Ahmed Mushtaq,
Khan Dalla El Kabir,
Baghdad. | „ M. A. Roy,
C/o. Shahid Yousuf & Co.,
Bah Al Agha,
Baghdad. |
| Messrs. Mohamed Saleh Al Dhaif,
Khan Dalla Al Kabir,
Baghdad. | „ Mohammed Bakir .
Mubarak.
Khan Shaaban, Saffafir,
Baghdad. |
| „ Naim H. Laila,
Khan Al Azzawi—Saffafir,
Baghdad. | „ Tawfiq Al Turaihey,
Khan Al Shabander,
Baghdad. |
| „ *Sahib Al Qamousi,
Murradeya Market,
Baghdad. | „ *S. M. Amin,
66 94, Amin Street,
Baghdad. |
| „ Salim D. Shamash,
Khan Al Pasha Al Kabir,
Baghdad. | „ *Nadji S. Daniel,
Khan Kettan,
Post Box No. 259,
Baghdad. |
| „ Tawfiq Qassim Saigh,
Murradeya Bazar,
Baghdad. | „ *N. E. Soorani,
Khan El Pasha El-Kabir,
Baghdad. |
| „ Yehouda Menashi Pattal,
Khan Al Pasha Al Kabir,
Baghdad. | Messrs. *K. K. Jain,
433 H. Y. Rashid Street,
Baghdad. |
| „ *Zawara Trading C.,
W.L.L.,
(Mr. Subhi Al Tayee),
Samawal St. 12 240,
Baghdad. | „ M. H. Burhani,
Qureishi Bldg.,
Shorja, Baghdad. |

Messrs. *H. S. Mahdi Al Marashi,	Messrs. Sahib Shaban,
Al-Safafeer,	Post Box No. 338,
Khan Al-Hariri,	Baghdad.
Post Box No. 169,	” Superagency,
Baghdad.	17a/37, Ras El-Qarya,
” Sabri Ayoub Na'man,	Baghdad.
Sa' Adoon Street,	” Towheed Trading
Baghdad.	Company,
” Abdul Majid Sanshal,	Khan Dalla Al-Kabir,
Al Murdaya Street,	Baghdad.
Baghdad.	” Makram Trading Co.
” Abdul Majeed Shanshal,	(W.L.L.),
Suleikh,	Mustansir Street,
Baghdad.	Abdul Munem Al-Khedair
” Abdul Radha Majid Latif,	Bldg., (3rd floor),
Rashid Street,	Baghdad.
Baghdad.	” Abood Kattan & Jaber
” Haj Saad Al-Areas,	Tahan,
Khan Al-Kattan,	Khan Dalla Al-Kabir,
Baghdad.	Baghdad.
Messrs. Shekar Abdul Saheb,	” Esmail Ali El Kurdi,
Shankerachi Bldg.,	Battaween,
Baghdad.	Baghdad.

(* Denotes Commission Agents.)

APPENDIX "7A"

IRAQ

Value of Artificial Textiles imported into Iraq, Countrywise,
during the years 1955 to 1959.

(Value in Iraqi Dinars)

Country	1955	1956	1957	1958	1959
					(January to September)
United Kingdom	34,791	52,560	44,311	32,348	19,651
U.S.A. ..	65,973	121,321	72,924	27,080	51,481
West Germany	171,904	209,326	254,039	218,992	117,960
Japan ..	4018,004	3379,749	4524,750	3873,105	2921,974
Syria ..	—	832,263	762,082	639,634	411,273
Hungary ..	—	211,895	71,626	68,066	89,704
Poland ..	—	76,490	71,996	80,098	22,698
France ..	—	68,911	72,924	27,080	5,925
Czechoslovakia	—	22,048	30,998	32,348	7,250
India ..	511	—	1,578	787	—
Other countries	1164,130	57,704	337,624	320,608	262,426

* Note: For the year 1959, the total Licenses issued for 6,186,447 Dinars have been issued.

(Source: The Embassy's Office)

APPENDIX "7B"

INDIAN EXPORTS TO IRAQ DURING THE YEAR 1958

RAYONS					Value in Rs.
Rayon piecegoods (n.e.s).	..	..	..	..	<u>4,950</u>
Rayon Manufactures	..	..	..	..	Nil
Synthetic Fibre Fabrics	..	..	..	..	<u>Nil</u>
Grand Total for Rayons					<u>4,950</u>
SILK FABRICS					
Sarees	..	..	..	..	766
SILK MANUFACTURES					
Garments	..	..	..	..	<u>36</u>
Grand Total for Silks					<u>802</u>

APPENDIX "7C"

INDIAN EXPORTS TO IRAQ DURING 1959

						Value in Rs.
RAYON FABRICS						
Rayons	..	..	..	..	..	6,942
				Total	..	<u>6,942</u>
NYLON FABRICS						
Nylons	..	..	..	..	..	39,460
MANUFACTURES						Nil
				Grand Total for Rayons	..	<u>46,402</u>
SILK FABRICS						Nil
MANUFACTURES						
Bedsheets		..	..	..	..	927
				Grand Total for Silks	..	<u>927</u>

APPENDIX "7D"

JAPANESE EXPORTS TO IRAQ DURING 1959

RAYON				Value in U.S. Dollars
Flat Crepe	..	..	..	5,000
Georgette Crepe	..	..	..	98,000
Befany	..	..	..	37,000
Fujiette	..	..	..	3,54,000
Sheer Crepe	..	..	..	2,09,000
Palace	..	..	..	1,37,000
Satin	..	..	..	1,04,000
Shioze	..	..	..	77,000
Taffeta	..	..	..	1,09,000
Twill	..	..	..	30,000
Voile	..	..	..	2,92,000
Orient Crepe	..	..	..	2,000
Fancy weave	..	..	..	44,000
Pique	..	..	..	1,000
Habutae	..	..	..	1,000
Rayon fabrics N.E.S.	..	..	..	10,75,000
			Total	<u>25,75,000</u>
SPUN RAYON				
Fancy weave	..	..	..	6,14,000
Gabardine	..	..	..	43,000
Muslin	..	..	..	22,05,000
Poplin	..	..	..	95,000
Serge	..	..	..	14,30,000
Shirting	..	..	..	60,000
Tropical	..	..	..	2,04,000
Suiting	..	..	..	10,68,000
S.R. Fabs. N.E.S.	..	..	..	4,49,000
Gingham	..	..	..	35,000
Amunzen	..	..	..	97,000
Linnet	..	..	..	5,000
			Total	<u>63,05,000</u>
SYNTHETIC FIBRE FABRICS				
Nylon fabs.	..	..	..	3,60,000
			Total	<u>3,60,000</u>
 GRAND TOTAL				 <u><u>92,40,000</u></u>

APPENDIX "8"

STATEMENT SHOWING RATES OF CUSTOMS DUTY ON ART SILK TEXTILES

IRAQ

Item No.	Description	Unit	Rates of Duty	
			ID	Fils
61/4	Woven fabrics or man-made fibres (continuous) including woven fabrics on monofil or strip of heading No. 51.01, 51.02			
	(a) Of synthetic textiles			
	1. Single or strip	Kilo Nett	0	580
	2. Others	" "	0	580
	(b) Of artificial textiles, weighing per sq. meter.			
	1. 150 grammes and more :			
	(a) Unbleached, bleached or dyed	" "	0	320
	(b) Printed, ornamented or figured	" "	0	80
	2. 75 grammes to less than 150 grammes :			
	(a) Bleached or unbleached or dyed	" "	0	410
	(b) Ornamented or figured	" "	0	430
	3. Less than 75 grammes :			
	(a) Bleached or unbleached or dyed	" "	0	480
	(b) Printed, ornamented or figured	" "	0	430
	4. Dubeit	" "	0	400
	5. Pitta	" "	0	400

(Source: The Embassy's Office)

APPENDIX "9"

**NAMES AND ADDRESSES OF MERCHANTS AND
IMPORTERS OF FABRICATED.
RAYON IN BEIRUT**

CLASS I.

Messrs. Mahmoud Nouri, Georges Picot St. Starco Building, Beirut.	,,	Abdel Rahman Sahma- rani & Bros. Allenby Street P.O. Box No. 291, Beirut.
,, N. Choueri & Sons (Magasins) Berange, Souk Tawile, P.O. Box 167, Beirut.	,,	Edmond Issa & Co., Allenby Street, Beirut.
,, Khalil Fattal & Sons, Port Street, P.O. Box 773, Beirut.	,,	A. Neechamall (Gd. Magasin Indian) Av. des Francais, P.O. Box 344, Beirut.
,, Chirinian Bros., Allenby Street, P.O. Box 452, Beirut.	,,	The Egyptian & Lebanese Trading Union, Port Street, P.O. Box 1180, Beirut.
,, Michel Kassatly & Sons, Allenby Street, Beirut.	,,	Hamze & Fouad Farra, Bab Indris, P.O. Box 240, Beirut.
,, Elias Francis Assouad, Souk El-Kezaz, P.O. Box 791, Beirut.	,,	ETS. Elie T. Kazan & Co., Place de l'Etoile, P.O. Box 1962, Beirut.
,, Chekerdjian Bros. & Co., Allenby Street, P.O. Box 769, Beirut.	,,	Moukhayech & Safadi, Saad Zaghoul Street, Beirut.
,, Fouad Abed-Rabbo, Souk Sursock, P.O. Box 3220, Beirut.	,,	Yeramian Bros. & Sons, Saad Zaghoul Street, P.O. Box 489, Beirut.
,, Dishara Cassir & Sons, Allenby Street, Beirut.	,,	Jacques Baladi, Khan el-Chouneh, Beirut.
,, Joseph & Abdallah Acouri, Souk Bustros, P.O. Box 534, Beirut.	,,	Mohamed Selim Kabbani, Souk Sursock, P.O. Box 4050, Beirut.
,, Leon Nazarian & Sons, Youssef Rami Street, P.O. Box 707, Beirut.	,,	Jamil & R. Kamal, Souk Sursock, P.O. Box 48, Beirut.

CLASS II.

Messrs. M. Bercoff & Sons, Moutran Street, P.O. Box 119, Beirut.	„ Nazem Chama (Ste. Syrienne de representa- tion), Maarad Street, P.O. Box 783, Beirut.
„ Elie M. Tasso, Souk Tawile, P.O. Box 152, Beirut.	„ Joseph Dichy & Co., Khan Tabet, P.O. Box 207, Beirut.
„ Haik Setrakian, Souk Sursock, Beirut.	„ Moussa & Joseph Zeitoune, Souck Sursock, P.O. Box 3218, Beirut.
„ Karl Tugendhaft, Maarad Street, P.O. Box 514, Beirut.	„ Georges Chirinian & Co., Saad Zaghoul Street, P.O. Box 2757, Beirut.
„ J. Greenberg, Majidieh Street, P.O. Box 725, Beirut.	„ Faitrouni & Co., Place de l'Etoile, P.O. Box 1156, Beirut.
„ Jacques J. Katri, Souk Sursock, Beirut.	„ ETS. Michel Tomb (Maison au Printemps), Allenby Street, Beirut.
„ M. Khatchadourian & Sons, Uruguay Street, P.O. Box 1363, Beirut.	„ Maslaton & Zeitoune, Souck Sursock, Beirut.
„ Georges Antakly & Sons, Youssef Rami Street, P.O. Box 40, Beirut.	

Note: Class I means firms of 1/2 Million to 1 Million Lebanese Pounds Capital.

Class II means 1/4 to 1/2 Million Lebanese Pounds Capital.

Other Importers

Messrs. Indo Arab Enterprisers, P.O. Box 2364, Beirut.
„ Maison Indienne Undernomall, P.O. Box 1637, Beirut.
„ Oriental Trading Co., Amar Khelat Bldg., Room No. 25, P.O. Box 2059, Beirut.

APPENDIX "10"

**MAN CLOTHING IN ARTIFICIAL SILK
SUBJECT TO SPECIFIC DUTY,
(Beirut)**

			1955	1956	1957	1958
			Leb. £.	Leb. £.	Leb. £.	Leb. £.
Canada	..	..	—	288	—	—
Denmark	..	..	—	—	—	100
Switzerland	..	..	—	588	642	—
Belgium	..	..	730	1540	1282	—
West Germany	..	..	4264	4132	2950	910
Italy	..	..	—	84	2708	5309
United Kingdom	..	..	19394	11586	8575	14649
Syria	..	..	460	105	442	183
France	..	..	954	1570	3067	1504
U.S.A.	..	..	40453	47107	74596	68864
Japan	..	..	—	—	164	126
Austria	..	..	298	—	—	—
Netherlands	..	..	1196	—	—	250
Greece	..	..	—	—	—	—
Spain	..	..	—	1015	400	—
Red China	..	..	135	1002	212	262
Hong Kong	..	..	1889	15821	2894	594
			69773	84838	97932	92751

SUBJECT TO AD VALOREM DUTY

Netherlands	..	..	177	—	266	—
Switzerland	..	..	—	160	—	—
India	..	..	390	—	—	—
France	..	..	1190	—	82	—
U.K.	..	..	770	200	—	—
U.S.A.	..	..	2706	310	1924	1115
Syria	..	..	360	410	—	—
Italy	..	..	—	290	334	424
Mexico	..	..	—	340	—	—
			5593	1710	2606	1539

(Source :—Charge D'Affairs Office, Beirut.)

APPENDIX "11A"

INDIAN EXPORTS TO LEBANON DURING THE YEAR 1958.

	Value in Rs.
RAYONS	
Rayon piecegoods (n.e.s.)	38,209
RAYON MANUFACTURES	
Ladies Handbags	5,852
SYNTHETIC FIBRE FABRICS	
	—
Grand Total for Rayons ..	<u>44,061</u>
 SILK FABRICS	
Sarees	6,483
Piecegoods	1,568
	<u>8,051</u>
 SILK MANUFACTURES	
Scarves	5,105
Grand Total for Silks ..	<u>13,156</u>

(Source :—Silk & Rayon Textiles Export Promotion Council)

APPENDIX "11B"

INDIAN EXPORTS TO LEBANON DURING 1959

					Value in Rs.
RAYON FABRICS	..	..	..	..	Nil.
NYLON	..	..	..	..	78,450
			Total	..	78,450
RAYON MANUFACTURES					
Scarves	..	..	..	..	110
Swim trunks	..	..	..	..	2,736
Garments	..	..	..	..	176
			Total	..	3,022
			Grand Total for Rayons	..	81,472
SILK FABRICS					
Saris	..	..	..	..	43,909
Brocade	..	..	..	..	2,650
Piecegoods	..	..	..	..	1,692
			Total	..	48,251
MANUFACTURES					
Scarves	..	..	..	..	9,763
Stoles	..	..	..	..	1,276
Neckties	..	..	..	..	1,450
Bedsheets	..	..	..	..	950
			Total	..	13,439
			Grand Total for Silks	..	61,690

(Source : The Silk & Rayon Textiles Export Promotion Council)

APPENDIX "11C"

JAPANESE EXPORTS TO LEBANON DURING 1959.

RAYON

	Value in U.S.
Palace	400
Taffetta	2,000
Twill	400
Satin	1,000
Rayon fabs. NES.	2,000
	5,800
Total	5,800

SPUN RAYON

Gabardine	5,000
Gingham	5,000
Fancy weave	8,000
Poplin	400
Shirting	2,000
Tropical	4,000
Suiting	400
S.R. fabs. NES.	2,000
Serge	16,000
	42,800
Total	42,800

SYNTHETIC FIBRE FABRICS

Nylon fabs.	21,000
Vynylon fabs.	3,000
	24,000
Total	24,000
Grand Total	72,600

APPENDIX "12"

NAMES AND ADDRESSES OF SILK AND RAYON TEXTILE DEALERS AND COMMISSION AGENTS IN SUDAN.

PORT SUDAN

Jadavjee Pitamber & Sons, P.O. Box No. 94, Port Sudan.	Chhotalal Motichand Parekh, P.O. Box No. 370, Port Sudan.
Manilal Samji Virani (S) Ltd., Post Box No. 251, Port Sudan.	Shantilal Gulabchand, P.O. Box No. 233, Port Sudan.
Maganlal Kanji, P.O. Box 214, Port Sudan.	Chhotalal Shobhagchand, P.O. Box No. 61, Port Sudan.
Narandas Kapurchand, P.O. Box No. 77, Port Sudan.	Maganlal Sobhagchand, P.O. Box No. 174, Port Sudan.

KHARTOUM

Highlife Stores, P.O. Box No. 1038, Khartoum.	*G. F. Kabbabe & Sons, Khartoum.
Benjamin Stores, P.O. Box No. 955, Khartoum.	*Gellatly Trading Co. Ltd., Khartoum.
Edward A. Dewek, P.O. Box No. 655, Khartoum.	*Kircop & Co., Khartoum.
The Nile Basin Trading Co., P.O. Box No. 97, Khartoum (North).	*Kronfi Brothers & Co., Khartoum.
Nagib Kaba, P.O. Box No. 271, Khartoum.	*Muradsons Cq. Ltd., Khartoum.
*A. N. Dwek & Sons, Khartoum.	*M. Alianak, Khartoum.
*Boxall & Co. Ltd., Khartoum.	*N. C. Gounaropoulos, Khartoum.
	*Sudan Import & Export Co., (Khartoum) Ltd., Khartoum.

*Eust C. Gounaropoulos,
Khartoum.

*Zenop Khatchikian & Co., Ltd.,
Khartoum.

*Edward A. Dwek,
Khartoum.

*Kronfli & Daghir,
Khartoum.

*** Note:— These Agents carry on Trade in many other
commodities and not only in Textiles.**

OMDURMAN

Chhotalal Vithaldas,
P.O. Box No. 224, Omdurman.

Jamnadas Devidas & Sons.,
P.O. Box No. 383, Omdurman.

Harkishandas Khooshal,
P.O. Box No. 108, Omdurman.

Gopal Trading Co.,
P.O. Box No. 549, Omdurman.

Ramji Samji Virani (S) Ltd.,
P.O. Box No. 241, Omdurman.

Manilal Samjee Virani (Sudan)
Ltd.,
P.O. Box No. 206, Omdurman,

S. Motichand & Co., Ltd.,
P.O. Box No. 489, Omdurman.

Chhaganlal Samji Virani,
Omdurman.

Dulabhjee Samjee Virani (S)
Ltd.,
P.O. Box No. 179, Omdurman.

Jayantilal Mooljee Shah,
P.O. Box No. 545, Omdurman.

Chunilal Chaturbhuj,
P.O. Box No. 102, Omdurman.

Narotamdas & Co.,
Omdurman.

Shantilal Kalidas Sheth,
P.O. Box No. 361, Omdurman.

Ottamchand Valjee,
P.O. Box No. 501, Omdurman.

Jayantilal Vithaljee Doshi,
P.O. Box No. 211, Omdurman.

APPENDIX "13A"

Particulars of countrywise imports of Art Silk fabrics for the years 1956, 1957 and 1958.

SUDAN

Country	Year 1956		Year 1957		Year 1958	
	Quantity in Tons	Value in Sudanese Pounds	Quantity in Tons	Value in Sudanese Pounds	Quantity in Tons	Value in Sudanese Pounds
Art Silk Piecegoods:						
Aden	14	9519	8	8393	1	567
Austria	1	547	1	781	—	—
Czechoslovakia	71	33506	43	22008	1	207
Egypt	1070	1122137	449	461483	177	162048
France	27	34867	4	12203	1	2483
Germany F.R.	10	12655	34	39885	11	11980
Hongkong	6	4266	5	4773	1	345
Hungary	138	62187	9	3667	1	938
India	5	6311	3	2273	2	1983
Italy	15	13485	28	30470	8	6500
Japan	569	395861	2222	1423598	608	330986
Netherlands	2	3006	4	4711	3	3673
Poland	59	22002	68	27888	1	293
Spain	10	3499	—	—	—	—
Syria	9	17936	9	13938	3	4442
United Kingdom	35	40430	57	53859	18	16802
Other countries	7	6217	29	24117	10	11797
	2048	1788431	2973	2134047	846	555044
Piecegoods of Mixed Artificial Silk & Cotton						
Egypt	565	508991	374	438081	182	213632
India	—	477	—	158	—	—
Italy	—	—	—	—	—	—
Syria	1	651	1	1221	—	193
United Kingdom	—	290	2	2750	—	—
Other Countries	1	780	4	3710	—	—
	567	511189	381	445920	182	213825

Country	Year 1956		Year 1957		Year 1958	
	Quantity in Tons	Value in Sudanese £	Quantity in Tons	Value in Sudanese £	Quantity in Tons	Value in Sudanese £
Nylon Piecegoods						
Germany F.R.	—	—	3	8633	—	2002
Italy	—	—	1	3234	—	110
Japan	—	—	6	29988	—	21302
United Kingdom	—	—	3	8977	—	2599
Other Countries	—	—	—	1650	—	1174
	—	—	13	52491	—	27187
Artificial Silk Ribbon						
Egypt	505	329	194	306	—	—
Italy	219	456	298	632	453	930
United Kingdom	10	20	45	46	80	136
Other Countries	20	39	8	101	—	356
(*In Kgs. only)	*754	844	*545	1,085	*	1,422
Artificial Textile Laces						
Egypt	1,214	721	162	137	—	—
India	354	359	10	19	—	—
Italy	—	—	68	144	—	—
Syria	520	452	1,900	2,056	—	—
United Kingdom	160	162	30	101	—	—
Other Countries	932	974	1,421	1,864	—	—
(*In Kgs. only)	*3,180	2,668	*3,591	4,321	—	—
Silk Piecegoods						
China	—	—	—	—	654	1,788
Egypt	—	—	—	—	2,009	3,148
France	—	—	—	—	—	—
Hongkong	—	—	—	—	—	—
Japan	—	—	—	—	90	433
Syria	—	—	—	—	—	—
United Kingdom	—	—	—	—	152	448
Other Countries	—	—	—	—	416	1,421
(*Quantity in Kgs.)	—	—	—	—	*3,321	7,238
Silk Ribbon & Laces						
United Kingdom	—	—	—	—	40	97
Other Countries	—	—	—	—	—	—
(*Quantity in Kgs.)	—	—	—	—	*40	97

(Source: Embassy's Office at Khartoum)

APPENDIX "13B"

**IMPORTS INTO THE SUDAN FOR THE FIRST 11 MONTHS OF
THE YEARS 1958, 1959**

SUDAN

ARTIFICIAL SILK PIECEGOODS IN KILOS.

Country	Quantity		Value (£S) C.I.F.	
	1958	1959	1958	1959
Czechoslovakia	2,121	149,816	1,042	85,151
Egypt	183,875	400,736	167,374	488,007
France	1,219	8	3,007	10
Germany, F.R.	10,954	793	12,600	479
Hungary	875	203,574	938	135,380
India	2,209	45,116	2,538	23,988
Italy	9,666	5,329	8,645	5,733
Japan	671,423	6	367,867	2
Netherlands	3,584	1,321	4,094	589
Poland	6,503	110,800	794	58,215
United Kingdom	18,841	1,439	18,214	1,458
Other Countries	18,420	140,716	19,500	95,345
TOTAL:	929,690	1059,654	606,613	894,357

MIXED ARTIFICIAL SILK AND COTTON PIECEGOODS

Egypt	184	278	215,631	310,024
Other Countries	—	23	193	14,857
TOTAL	184	301	215,824	324,881

(Source: Embassy's Office at Khartoum)

APPENDIX "13C"
IMPORTS INTO SUDAN

SUDAN

Item/Countries	Whole Year.			
	Quantity		Value (£S) C.I.F.	
	1958	1959	1958	1959
ARTIFICIAL SILK				
PIECEGOODS: Kilos.				
Czechoslovakia	525	151,568	207	86,757
Egypt	177,236	537,718	162,048	656,013
France	1,076	497	2,483	1,099
Germany F.R.	10,798	793	11,980	479
Hungary	875	215,724	938	145,018
India	1,725	79,763	1,983	57,757
Italy	7,555	6,099	6,500	6,397
Japan	607,807	6	330,986	2
Netherlands	3,218	5,540	3,673	3,572
Poland	646	110,800	293	58,215
United Kingdom	17,600	6,604	16,802	4,979
Other Countries	16,473	143,152	17,151	97,684
TOTAL:	845,534	1258,264	555,044	1117,972
 PIECEGOODS OF MIXED				
ARTIFICIAL SILK & COTTON				
Tons.				
Egypt	182	305	213,632	341,377
Other Countries	—	23	193	14,857
TOTAL:	182	328	213,825	356,234

(Source: Embassy's Office at Khartoum)

APPENDIX "14A"

INDIAN EXPORTS TO SUDAN DURING THE YEAR 1958

RAYONS	Value in Rs.			
	Nil			
Rayon Manufactures:—Garments—	..	..	..	4,655
				<hr/>
SPUN RAYONS				
Sarees (Cotton mixed)	..	..	..	1,492
				<hr/>
SYNTHETIC FIBRE FABRICS	..	..	..	—
				<hr/>
Grand Total for Rayons				6,147
				<hr/>
SILK FABRICS				
Silk Manufactures	..	..	..	—

(Source: The Silk & Rayon Textiles Export Promotion Council)

APPENDIX "14B"

INDIAN EXPORTS TO SUDAN DURING 1959

SUDAN

RAYON FABRICS						Value in Rs.
Saris ..	..	..	..	..	..	9,976
Saris (CM)	..	..	..	..	..	36,882
Crepe	..	..	..	..	..	1,92,704
Flat Crepe	..	..	..	..	..	60,092
Halfe Crepe	..	..	..	..	..	51,939
Satin Crepe	..	..	..	..	..	20,257
Linen ..	..	..	..	..	..	1,96,379
Brocade	..	..	..	..	..	7,807
Shirting	..	..	..	..	..	26,897
Shantung	..	..	..	..	..	29,461
Tapestry	..	..	..	..	..	6,477
Rayon Fabs (CM)	..	..	..	..	..	16,069
Linen (SR)	..	..	..	..	..	6,648
Rayon Fabs (NES)	..	..	..	..	..	7,54,266
				Total		14,15,854
NYLON	..	..	..	..	..	1,883
				Total		1,883
RAYON MANUFACTURERS						
Garments	..	..	..	..	..	2,081
				Total	..	2,081
				Grand Total for Rayons	..	14,19,818
SILK FABRICS						
Saris	..	..	..	..	..	125
				Total	..	125
MANUFACTURERS						
	..	..	..	..	..	Nil.
				Grand Total for Silks	..	125

(Source : The Silk & Rayon Textiles Export Promotion Council)

APPENDIX "15"

S U D A N

**IMPORT DUTIES IN THE SUDAN EFFECTIVE FROM THE
22nd/23rd JUNE, 1959.**

S. No.	Item	New Rate
20	Cloth, ready made, all kinds ..	70% Ad-valorem
25	Cotton Piecegoods, bleached ..	30% ..
26	Cotton Piecegoods, grey ..	20% ..
27	Cotton Thread ..	25% ..
63	Cotton Yarn ..	15% ..
63	Textile Fabrics not elsewhere specified	50% ..

(Source :—Embassy's Office at Khartoum)

APPENDIX "16"

**EXPORTS OF SELECTED ITEMS FOR 11 MONTHS OF THE
YEAR 1958 AND 1959 FROM SUDAN**

(VALUE IN £S.000)
QUANTITY IN TONS.

Items	Quantity		Value (£S) C.I.F.	
	1958	1959	1958	1959
Cotton Ginned Sakal ..	69,770	149,915	20,841	34,492
Gum Arabaic ..	47,063	40,736	5,107	4,886
Ground Nuts ..	54,800	37,532	3,049	3,152
Sesame ..	26,721	39,824	2,035	2,460
Cattle ..	37,744	6,979	999	139
Cotton Seeds ..	50,574	156,045	1,330	4,222
Hides & Skins ..	3,956	4,790	833	990
Cotton Ginned American ..	5,902	18,277	1,086	3,137
Sheep ..	80,593	123,872	581	836
Dura ..	11,683	70,747	264	1,621
Melon Seeds ..	2,331	4,825	70	152

**SELECTED ITEMS IMPOSED INTO SUDAN DURING THE
YEARS 1958 AND 1959 (FOR ELEVEN MONTHS ONLY).**

Items	Quantity	Value in	Quantity	Value in
	in tons	thousand Sud. £	in tons	thousand Sud. £
	1958		1959	
Cotton Piecegoods ..	13,723	6,175	12,943	5,423
Base Metal ..	—	8,523	—	4,204
Vehicles and Transport Equipments ..	—	7,728	—	5,885
Machinery ..	—	5,500	—	3,205
Petroleum Products ..	380,081	4,678	375,315	4,196
Sugar ..	85,541	3,195	101,998	3,246
Coffee ..	4,218	1,299	7,675	2,150
Tea ..	7,140	2,607	7,918	2,918
Artificial Textiles ..	1,115	822	1,361	1,219
Chemicals & Pharmaceuticals ..	—	1,346	—	1,393
Sacks Jute ..	11,618	1,055	4,608	386
Wheat Flour ..	41,596	1,036	73,122	1,748

(Source: Embassy's Office at Khartoum)

APPENDIX "17"

**RATE OF FREIGHT BY RAIL AND MOTOR TRUCKS IN
EAST AFRICA**

By Rail from Mombasa to Nairobi	—	20 cents per lb.
By Rail from Mombasa to Mwanza	—	20 cents per lb.
By Rail from Mombasa to Kisumu	—	15 cents per lb.
By Rail from Mombasa to Dar-es-Salam	—	12 cents per lb.
By Motor Transport from Mombasa to Jinja	—	18 cents per lb.
By Motor Transport from Mombasa to Nairobi	—	6½ cents per lb.
By Motor Transport from Mombasa to Tanga	—	6 cents per lb.

APPENDIX "18A"

SILK AND RAYON TEXTILE IMPORTERS AND MANUFACTURERS' REPRESENTATIVES

NAIROBI

Glad-Ak-Limited	P.O. Box No. 1901, Nairobi.
Hemraj Bharmal Ltd.	" 1007, "
Sundry Silk House	" 1713, "
Shah & Sons	" 3554, "
Somchand & Co.	" 1109, "
Dharamshi Virpar & Co.	" 1694, "
Bazaar Emporium	" 5288, "
Premchand Keshavji & Bros.	" 1285, "
Paris Bazar	" 3975, "
Popatlal Padamshi	" 2643, "
Shah Nemchand Fulchand Ltd.	" 962, "
Virji Narshi	" 364, "
Lakhamshi Silk House	" 1279, "
Fulchand Khimji & Co.	" 5168, "
Devchand Karamshi & Co.	River Road, Nairobi.
D. D. Shah & Co.	P.O. Box No. 5270, Nairobi.
Consolidated Agencies	" 1225, "
Sojpar Nathoo	" 2557, "
Overseas Trading Agencies	" 5865, "
Gordhandas Jethalal & Sons	" 413, "
Karman Juthalal Shah	" 2709, "
Punja Parbat Gudka	" 10032, "
Impex Agency	" 6887, "
Khimji Devraj & Co.	" 2839, "
*Bhagwanji & Co.	" 214, "
*Anglo Overseas Trading Co.	" 5056, "
*Shah Meghji Ladha & Co.	" 2873, "
*Premchand Bros Ltd.	" 945, "
*P. G. Warner & Co. Ltd.	" 1014, "

*Ricks Ltd.	„	1109	„	†
*Premchand Raichand Ltd.	„	52,	„	
*B. S. Mohindra & Co.	„	30094,	„	†
*Jayant Pandit & Bros.	„	10328,	„	
*Kanti & Co.	„	2565,	„	
*Kenya Overseas Co. Ltd.	„	2569,	„	
*Munshi Ram & Co. Ltd.	„	754,	„	
*International Agencies Ltd.	„	2580,	„	
*A. H. Nurmohamed & Co.	„	5440,	„	†
*Abbas Brothers	„	9210,	„	†
*Gudka Commercial Agencies	„	1279,	„	†
*Atoz Agencies Ltd.	„	9511,	„	
*Desraj Brothers Ltd.	„	2469,	„	
*Ebrahim & Co. Ltd.	„	897,	„	
*S. A. Hasham	„	9000,	„	
*Textrade Ltd.	„	687,	„	†
*Shantilal P. Shah			Panachand Mansion, Gulzar Street, Nairobi.	†

Note:— † Denotes dealing in Textile.

* Denotes Manufacturers' Representatives.

APPENDIX "18B"

**LIST OF MERCHANTS, COMMISSION AGENTS & RETAILERS
DEALING IN COTTON, RAYON & SILK TEXTILES, MOMBASA**

		P.O. BOX No.
M/s:	A. H. Nurmohamed & Co. Ltd.	225, Mombasa
"	Abbas Bros.	203, "
"	Amirali Bros. Ltd.	1147, "
"	A. R. Gulamani & Co. Ltd.	946, "
"	Bhagwanji Kachra Ltd.	846, "
"	Babulal Narshi & Co. Ltd.	649, "
"	B. S. Mohindra & Co.	1485, "
"	Dhanani & Co.	438, "
"	Devchand Khimchand & Co.	227, "
"	Dharamshi Punja Dhanani	1261, "
"	Hirji Valabhji & Bros.	943, "
"	Dharamshi Pirani & Co.	528, "
"	Devani Brothers	885, "
"	Dodhia Trading Co.	889, "
"	European General Agency	43, "
"	East African Blankets Syndicate	761, "
"	Gordhandas Kalidas & Co. Ltd.	450, "
"	H. A. Juma Essak	159, "
"	Hirji Manek Shah Ltd.	189, "
"	Hemraj Bharmal & Bros.	1007, "
"	Husein Meghji Dossa	1200, "
"	Harilal & Co.	1072, "
"	International Trading Corporation Ltd.	133, "
"	Jivraj Vardhaman & Bros.	71, "
"	Jamshedji Sheth & Co. Ltd.	841, "
"	Kalidas Kanji & Co. Ltd.	168, "
"	Kachra Jivraj Shah	558, "
"	Kenya General Stores Ltd.	287, "
"	Karimjee Jivanjee & Co. Ltd.	42, "
"	Karman Mepa & Co.	147, "
"	Keshavji Anandji & Co. Ltd.	550, "
"	Kaderdin Hajee Essak	295, "
"	Keshavlal & Co. Ltd.	801, "
"	Kisumu Trading Stores	7, "
"	K. J. Shah & Co.	79, "
"	M. R. Fazal & Co.	240, "
"	Meghi Mulji Shah Ltd.	458, "

	P.O. Box No.	
M/s. Mansuklal Meghji & Co.	1023,	Mombasa
„ Meghji Ladha & Co.	89,	„
„ Mercantile Agency	382,	„
„ Malkan Bros.	1714,	„
„ Mohamed Husein Adam	2843,	„
„ Nemchand Virpal Shah	717,	„
„ Nathu Dharamshi & Co.	1399,	„
„ Osman Ahmed	938,	„
„ Premchand Nathu & Co. Ltd.	197,	„
„ Premji Dhanji Ltd.	97,	„
„ Popatlal Karman & Co.	1156,	„
„ Ramzan Bros.	201,	„
„ Rajnikant & Co.	1562,	„
„ Ramji Karman Shah	865,	„
„ Ramji Raishi & Co.	3034,	„
„ Samji Kala & Co. Ltd.	624,	„
„ Shah & Co. Ltd.	302,	„
„ Sindh General Stores	279,	„
„ Sawjane Trading Stores	107,	„
„ Savadia Bros.	713,	„
„ Shanghavi & Co. (Mombasa)	362,	„
„ Shah Nemchand Fulchand Ltd.	151,	„
„ Shah Karamshi Panachand & Co.	1201,	„
„ Shah Devraj Hirji	2181,	„
„ Shantilal Bros. Ltd.	1526,	„
„ Shah Fulchand Ranmal	1466,	„
„ Taibali Abdulhusein & Co. Ltd.	448,	„
„ Thakersey Laxmidas	43,	„
„ Valabhdas Kakoobhai & Co.	1828,	„
„ Velji Punja Shah	307,	„
„ Valabhdas Gokaldas Shah	917,	„
„ Vaghji Velji & Co.	2215,	„
„ Velji & Co.	862,	„
„ Vrajlal & Co.	142,	„
„ Khimasia Stores	1378,	„
„ Lakhamshi Govindji & Co.	2174,	„
„ Vanza Stores Ltd.	2221,	„
„ Nathoo Mooljee	1877,	„
„ The East Africa Trading Stores	2534,	„
„ Jivraj L. Shah	2970,	„
„ Shah Punja Parbat & Co.	7,	„
„ Meghji Khimji Gudhka	1128,	„

			P.O. Box No.	
M/s.	Mulji Samat	.. ..	862,	Mombasa
„	Mehta Bros.	.. ..	237,	„
„	Shah Virchand Devji & Co.	.. ..	395,	„
„	Lakhamshi Karamshi	.. ..	346,	„
„	Popatlal Padamshi	.. ..	2643,	„
„	B. N. Doshi & Co.	.. ..	1574,	„
„	Raishi Pethraj Dhanani	.. ..	1052,	„
„	Babulal General Stores	.. ..	639,	„
„	Sojpar Nathoo	.. ..	1709.	„
„	Shah Virpar Pethraj & Co.	.. ..	1283,	„
„	R. P. Sangani & Co. Ltd.	.. ..	97,	„
„	Jayantilal Devraj & Co.	.. ..	2843,	„
„	Shah Vershi Rajpar & Co.	.. ..	1848	„
„	Virchand Virpal & Sons	.. ..	952,	„
„	Natha Lila	.. ..	1992,	„
„	Dharamshi Stores	.. ..	2696,	„
„	Narandas & Co.	.. ..	3037,	„
„	Overseas Textiles Ltd.	.. ..	4,	„
„	Ramji Jivraj & Co.	.. ..	815,	„
„	Virchand & Co.	.. ..	170,	„
„	Manilal & Co.	.. ..		„
„	Arjan Valji & Sons	.. ..	964,	„
„	Dayaram Sons	.. ..	9099,	„
„	Govindji Depar & Sons	.. ..	807,	„
„	Kotak Stores	.. ..	817,	„
„	Raychand Devraj & Co.	.. ..	142,	„
„	Chunilal Lakhamshi Shah	.. ..	1805,	„
„	Ambalal Emporium Ltd.	.. ..	4,	„
„	Radia Stores	.. ..	2093,	„
„	Glamour, International Traders (E.A.) Ltd.	.. ..	660,	„
* „	Amirali Brothers Ltd.	.. ..	1147,	„
* „	A. H. Nurmahomed & Co. Ltd.	.. ..	225,	„
* „	Africa Overseas Trading Co.	.. ..	946,	„
* „	Abbas Brothers	.. ..	203,	„
* „	Azad World Agencies	.. ..	199,	„
* „	Colonial Distributors	.. ..	1367,	„
* „	D. G. Pathak & Bros.	.. ..	607,	„
* „	E. N. Adamjee & Co.	.. ..	162,	„
* „	European General Agencies	.. ..	1429,	„
* „	Hussein Meghji Dossa	.. ..	1200,	„
* „	Vallabhdas Gokaldas	.. ..	917,	„
* „	Keshavlal & Co.,	.. ..	801,	„

		P.O. Box No.	
*M/s.	Harakhachand Nathoo & Co.	.. ..	877, Mombasa
*	„ Lloyds Corporation	.. ..	161, „
*	„ S. H. Rahemtulla & Co.	.. ..	993, „
*	„ Thakker United Agencies	.. ..	1773, „
*	„ Navnitlal Chamshi Mehta	.. ..	1726, „
*	„ Universal Agencies Ltd.,	.. ..	823, „
*	„ K. D. Rawal & Co.	.. ..	183, „
*	„ S. L. Doshi & Co.	.. ..	111, „
*	„ Jamshedji Sheth & Co. Ltd.,	.. ..	841, „
*	„ Somalia Overseas Co.	.. ..	591, „
*	„ Ocean Trading Co.	.. ..	702, „
*	„ Kalidas Kanji (Africa) Ltd.	.. ..	939, „
*	„ Pandya Agencies Ltd.	.. ..	135, „
*	„ Munverali G. E. Karachiwalla	.. ..	912, „
*	„ Navnitlal Premchand & Co.	.. ..	490, „
*	„ Taj Overseas Agencies	.. ..	2333, „
*	„ Kent World Agencies	.. ..	— Mombasa
*	„ Kothari Agencies	.. ..	1031, „
*	„ A. R. Gulamani & Co. Ltd.	.. ..	946, „
*	„ B. S. Mohindra & Co.	.. ..	1485, „
*	„ Jamnadas Lalji & Co.	.. ..	587, „
*	„ Karsamali Esmail & Co. Ltd.	.. ..	375, „
*	„ Kanti & Co. Ltd.	.. ..	1033, „
*	„ Mercantile Agency	.. ..	382, „
*	„ Malkan Bros.	.. ..	1714, „
*	„ Internationale Commerciale Ltd.	.. ..	1206, „
*	„ Tanna & Company	.. ..	1020, „
*	„ Chetan W. Khubchandani	.. ..	3052, „
*	„ R. S. Campbell & Co. (1950) Ltd.	.. ..	153, „
*	„ Manghanis' Ltd.	.. .. C/o.	151, „
*	„ G. F. Nasser	.. ..	212, „
*	„ Shah Somchand Ladhahbai	.. ..	890, „
*	„ Twentsche Overseas Trading Co. Ltd.,	.. ..	320, „
*	„ B. G. Vyas & Co.,	.. ..	1708, „
*	„ African Merchandise Agencies	.. ..	2011, „
*	„ Pioneer Agencies	.. ..	836, „
*	„ Yeshwantraï Vallabhdas	.. ..	1503, „
**	„ Hirji Vallabhji	.. ..	943, „
**	„ Sindh General Stores Ltd.	.. ..	279, „
**	„ Coast Drapers	.. ..	9026, „
**	„ Mombasa Silk Emporium	.. ..	937, „

APPENDIX "18C"

NAMES AND ADDRESSES OF IMPORTERS AND MERCHANTS OF SILK AND RAYON TEXTILES

DAR-ES-SALAM

	P.O. Box No.	
Abdulaziz & Co. Ltd.	47,	Dar-es-Salam
Alibhai Panju & Sons,	478,	"
Afra 1956	162,	"
A. Ahmed Jaffer	561,	"
Pirbhai Jiwa Bharwani	100,	"
Chhagan Bhanji & Sons Ltd.	356,	"
Chunilal Vithaldas Morjaria	1882,	"
B. Choitram	63,	"
Dayal Khatau & Sons Ltd.,	62,	"
Bhanji Visram & Son	392,	"
Daya Walji & Co.,	3,	"
Dewani Brothers,	101,	"
Dwarkadas Morarji & Sons Ltd.,	671,	"
Dayalji Gordhandas Davda Ltd.	653,	"
Fazal Nazarali & Co. Ltd.	158,	"
Gujarat Provision Stores	193,	"
Govindji Depar & Sons	2991,	"
Hasham Mohamed Alli & Sons Ltd.	481,	"
Hansraj Nanji	294,	"
Haridas Savji Rajani	1535,	"
Hemraj Bharmal Ltd.	1310,	"
Haji Brothers & Co. Ltd.	219,	"
Juma Haji & Co. Ltd.	276,	"
Juthalal Velji Ltd.	35,	"
Jethalal Kalyanji & Co.	1154,	"
Jamnadas Gordhandas & Co. (T) Ltd.	116,	"
Jiwan Hirji & Sons Ltd.	321,	"
Karimjee Jivanjee & Co. Ltd.	51,	"
Keshavji Anandji & Co. (T) Ltd.	55,	"
Kalyanji Devchand Suchak	1809,	"
Kalidas Kanji (Africa) Ltd.	1784,	"
Kanji Jeram & Sons	951,	"
Karsandas Jeram Pabari & Co.	383,	"
Ladhabhai Parmanand & Sons.	428,	"
Liladhar Vithaldas Visram	1207,	"

Lavji Kara	.. ..	139,	Dar-es-Salam
Ladha Sumar & Sons Ltd.	.. ..	437,	"
Maganlal Liladhar & Sons	.. ..	101,	"
Majithia Brothers	.. ..	1772,	"
Mohanlal Mathurdas & Sons	.. ..	1277,	"
Manilal Pardhan Nathwani	.. ..	265,	"
Nurbhai Abdabhai & Co.	.. ..	520,	Dar-es-Salam
Odhavji Vithaldas Visram	.. ..	634,	"
Oriental Traders Ltd.	.. ..	223,	"
Premchand Dharamshi & Co.	.. ..	2705,	"
P. V. Rajani & Co.	.. ..	394,	"
Shanghvi & Co.	.. ..	488,	"
Suchak Bros.	.. ..		Dar-es-Salam
Suleman Devji & Co. Ltd.	.. ..	279,	"
Suleman Mohamed Bhimji	.. ..	594,	"
Trikamdas Ladhahai & Bros. Ltd.	.. ..	525,	"
Teekay Ltd.	.. ..	500,	"
Karsan & Co.	.. ..	217,	"
Naran Bhowan & Co.	.. ..	2755,	"
Vaghi Velji & Co.	.. ..	2991,	"
Traders Ltd.	.. ..	681,	"
Mohanlal J. Kotak	.. ..	1282,	"
Habib Lalji Jetha	.. ..	830,	"
A. M. Lakhani	.. ..	760,	"
*Bhat Bros.	.. ..	1154,	"
*Karimjee Jivanjee & Co. Ltd.	.. ..	51,	"
*A. M. Chatoo & Sons	.. ..	9022,	"
*K. M. Kotak & Co.	.. ..		Dar-es-Salam
*Trinity Trading Co.	.. ..		"
*A. H. Virjee & Co.	.. ..		"
*Exim Agencies	.. ..		"

Note: * Denotes Commission Agents and/or Manufacturers' Representative.

APPENDIX "18D"

**LIST OF TEXTILE IMPORTERS KNOWN TO THE CHAMBER,
IN KAMPALA**

		P.O. Box No.	
Ambalal Emporium Ltd.,	.. ..	258,	Kampala.
Africa Gen. Stores,	.. ..	109	"
A. D. Mehta & Sons,	.. ..	184,	"
Busunju Stores,	.. ..	1693,	"
A. Karim Janmohamed Jaffer,	.. ..	3077,	"
Babulal Vindorai & Co.,	.. ..	951,	"
B. T. Savani,	.. ..	3122,	"
Ghakubhai Kanji Ltd.,	.. ..	224,	"
Chatrabhuj Nagji & Bros. Ltd.,	.. ..	521,	"
Colonial Merchants, (Uganda) Ltd.	.. ..	475,	"
Chhaganbhai Mawji,	.. ..	760,	"
C. L. Sodha,	.. ..	1076,	"
Dhanji Kala Ltd.,	.. ..	548,	"
Devidas P. Bros Ltd.,	.. ..	1756,	"
Dayalal Mohanlal,	.. ..	257,	"
Girdhar Purshotam & Co. Ltd.,	.. ..	552,	"
Hind Africa Corporation Ltd.,	.. ..	1594,	"
Intertropical Trading Corpn. Ltd.	.. ..	870,	"
Ishwarlal P. Bros. Ltd.,	.. ..	278,	"
Janmohamed Jaffer (Uganda) Ltd.	.. ..	550,	"
Jechand Kachara & Co.,	.. ..	565,	"
Jivabhai V. Patel & Co. Ltd.,	.. ..	633,	"
Jamnadas Nanchand Sheth,	.. ..	1049,	"
Kalidas Kanji (Africa) Ltd.,	.. ..	(Private Bag)	"
K. B. Patel & Bros. Ltd.,	.. ..	112,	"
Kasanda Trading Co. Ltd.,	.. ..	741,	"
Kasanda Textiles,	.. ..	30281,	"
Karim Janmohamed Jaffer,	.. ..	1129,	"
Mulchand Popat Shah,	.. ..	325,	"
National Emporium Ltd.,	.. ..	746,	"
New Fabric Stores,	.. ..	912,	"
Nutan Emporium,	.. ..	1953,	"
Overseas Textiles Ltd.,	.. ..	983,	"
Overseas Drapers,	.. ..	280,	"
Popatlal Mithalal,	.. ..	607,	"
Premji Hansraj & Co., Ltd.,	.. ..	272,	"

P. B. Damani,	.. ..	528,	Kampala.
Parmanand Ranchod,	.. ..	2550,	..
Rajh Stores,	.. ..	313,	..
Ranchhodbhai Dahyabhai,	.. ..	2203,	..
Sukhlal Shantilal & Co.,	.. ..	689,	..
Tanna Trading Co.,	.. ..	963,	..
Virchand Mithalal Ltd.,	.. ..	634,	..
Vallabhdas Kalidas & Co. Ltd.,	.. ..	164,	..
Veljibhai J. Mehta & Bros. Ltd.,	.. ..	809,	..
Alibhai Jivraj & Co.,	.. ..		Kampala.
Jagjiwan Mulji & Bros. Ltd.,	.. ..	98,	..
International Trading Co. Ltd.,	.. ..	608,	..
*Overseas Commercial Agencies Ltd.	.. ..	1271,	Kampala.
*Colonial Distributors Ltd.,	.. ..	1246,	..
*Prakash and Company,	.. ..	104,	..
*Apex Agency,	.. ..	1184,	..
*East England Trade Agency,	.. ..	2090,	..
*London Overseas Trading Company Ltd.,	.. ..	2139,	..
*Samji & Company,	.. ..		Kampala.
*Chatur Tarmohamed Limited,	.. ..	62,	..
*United Agency Limited,	.. ..	1593,	..
*International Agency Limited,	.. ..	1554,	..
*Husein Memhji Dossa,	.. ..		Kampala.
*A. H. Noormohamed & Company Limited,	.. ..	1589,	..
*Mountain & Company Limited,	.. ..	683,	..
*P. Phillips & Co. Ltd.,	.. ..	1344,	..
*Angle Nordic Ltd.,	.. ..	1362,	..
*Neptune Agency,	.. ..		Kampala.
*Chhotabhai & Company,	.. ..	250,	..
*Ocean Trading Company,	.. ..		Kampala.
*Sanghvi Brothers,	.. ..	909,	..
*Jobanputra Brothers Ltd.,	.. ..	1059,	..
*B. S. Mohindra & Company Ltd.,	.. ..	1577,	..
*J. L. Morrisons Sons & Jones (E.A.) Ltd.,	.. ..	1113,	..
*Joe Hansen & Soehne (E.A.) Ltd.,	.. ..	233,	..

* Denotes Manufacturers' Representatives

APPENDIX "19A"

STATEMENT SHOWING THE QUANTITY AND VALUE OF IMPORTS OF SILK & SILK RAYON
FABRICS INTO BRITISH EAST AFRICA DURING THE YEAR 1957, 1958 & 1959.

KENYA

Articles and countries of origin	Unit of Quantity	1957		1958		1959	
		Quantity	Value £	Quantity	Value £	Quantity	Value £
Silk Fabrics (pure or mixed)							
India	Sq. Yd.	3,755	1,644	3,280	1,588	354	176
United Kingdom	" "	459	705	541	901	415	630
Hong Kong	" "	1,770	478	—	—	—	—
France	" "	1,861	1,187	359	184	17	8
Japan	" "	75,300	8,779	43,463	4,872	4,321	1,086
Other Countries	" "	13,544	1,682	4,883	674	2,601	227
Total		<u>96,689</u>	<u>14,475</u>	<u>52,526</u>	<u>8,219</u>	<u>7,708</u>	<u>2,127</u>
Fabrics of synthetic fibres and spun glass, (including artificial silk piecegoods).							
India	" "	19,297	1,939	376,234	54,647	371,369	40,895
United Kingdom	" "	1,558,187	152,311	394,679	47,326	391,402	48,021
United Kingdom (Government)	" "	—	—	4,333	768	4,014	951
Hong Kong	" "	1,863,742	112,907	139,821	8,906	16,091	2,268
France	" "	72,593	21,384	20,293	5,788	19,052	4,170
Japan	" "	31,123,395	2,094,164	34,006,266	2,245,671	19,832,376	1,407,596
Germany (West)	" "	—	—	878,111	102,291	—	—
Italy	" "	—	—	667,684	11,981	—	—
Other Countries	" "	3,513,593	436,092	432,170	55,048	1,180,914	141,035
Total		<u>38,150,807</u>	<u>2,818,797</u>	<u>36,919,591</u>	<u>2,632,426</u>	<u>21,815,218</u>	<u>1,644,936</u>

APPENDIX "19B"

INDIAN EXPORTS TO KENYA DURING THE YEAR 1958

RAYONS	Value in Rs.
Rayon Sarees	21,186
Crepe	1,10,955
Satin	18,583
Taffeta	20,344
Linen	6,000
Suiting	1,959
Sharkskin	9,384
Shirting	29,034
Lungi	2,025
Bush Shirting	2,152
Rayon Piecegoods (n.e.s.)	7,44,020
Total	9,65,642
SPUN RAYONS:	
Lungi (Spun Rayon & Cotton Mixed)	5,885
RAYON MANUFACTURES:	
Caps	442
Socks	9,676
Hosiery	2,506
Garments	103
Shawls	1,265
Total	13,992
SPUN RAYON MANUFACTURES:	
Hosiery	2,496
SYNTHETIC FIBRE FABRICS:	
Nylon Sares	11,146
Nylon Georgette	295
Nylon Satin	705
Nylon Doria	424
Nylon Shirting	14,240
Nylon Piecegoods (n.e.s.)	47,030
Total	73,840

SYNTHETIC FIBRE MANUFACTURES:		Value in Rs.
Socks	.. . . .	<u>12,073</u>
	Grand Total for Rayons	<u>10,73,928</u>
SILK FABRICS:		
Sarees	.. . . .	137
SILK MANUFACTURES:		
Garments	.. . . .	<u>103</u>
	Grand Total for Silks	<u>240</u>

(Source: The Silk & Rayon Textiles Export Promotion Council)

APPENDIX "19C"

INDIAN EXPORTS TO KENYA DURING 1959

RAYON FABRICS:					Value in Rs.
Saris	..	..	..	..	32,420
Crepe	..	..	..	..	13,575
Satin	..	..	..	..	719
Taffetta Brocade	..	..	..	..	1,538
Jacquard Taffetta	..	..	..	..	2,456
Linen	..	..	..	..	1,731
Lining	..	..	..	..	1,088
Rayon Fabrics (SR)	..	..	..	..	7,881
Lungi (CM)	..	..	..	..	5,189
Rayon Fabrics (CM)	..	..	..	..	11,402
Rayon Fabrics (SRCM)	..	..	..	..	2,202
Rayon Fabrics (NES)	..	..	..	..	3,23,382
				Total	4,03,583
NYLON:					
Saris	..	..	..	..	15,772
Sati	..	..	..	..	5,104
Georgette	..	..	..	..	7,306
Nylon Fabrics (NES)	..	..	..	..	56,138
				Total	84,320
RAYON MANUFACTURES:					
Lace	..	..	..	..	29,788
Socks	..	..	..	..	2,625
Socks (Nylon)	..	..	..	..	295
Caps	..	..	..	..	254
Garments	..	..	..	..	870
				Total	33,832
Grand Total for Rayons					5,21,735

SILK FABRICS:				Value in Rs.
Saris	..	..	..	3,654
			Total	<u>3,654</u>
MANUFACTURES:				
Scarves	..	..	..	1,593
Neckties	..	..	..	1,594
			Total	<u>3,187</u>
			Grand Total for Silks	<u>6,841</u>

(Source: The Silk & Rayon Textiles Export Promotion Council)

APPENDIX "19D"

JAPANESE EXPORT TO KENYA DURING 1959

RAYON				Value in U.S. Dollars
Flat Crepe	..	..	..	19,000
Georgette Crepe	..	..	..	18,000
Bemfany	..	..	..	1,200
Fancy Weave	..	..	..	5,000
Fujiette	..	..	..	11,300
Sheer Crepe	..	..	..	1,000
Palace	..	..	..	39,400
Satin	..	..	..	48,000
Shioze	..	..	..	7,000
Tafetta	..	..	..	13,400
Twill	..	..	..	5,800
Voile	..	..	..	12,200
Habutae	..	..	..	1,000
Oriental Crepe	..	..	..	1,000
Satin Crepe	..	..	..	1,000
Rayon Fabrics NES	..	..	..	88,000
			Total	2,72,300
<hr/>				
SPUN RAYON				
Amuzen	..	..	..	1,000
Gaberdine	..	..	..	14,000
Muslin	..	..	..	14,85,000
Poplin	..	..	..	98,000
Serge	..	..	..	3,91,000
Tropical	..	..	..	47,000
Suiting	..	..	..	63,000
S. R. Fabrics NES	..	..	..	31,000
Gingham	..	..	..	69,000
Shirting	..	..	..	94,000
Fancy Weave	..	..	..	17,000
			Total	23,10,000
<hr/>				

SYNTHETIC FIBRE FABRICS:				Value in U.S. Dollars
Nylon Fabrics	..	..	..	5,60,000
Vinylidene Fabrics	..	..	..	400
Synthetic Fabrics NES	..	..	..	23,000
			Total	<u>5,83,400</u>
			Grand Total	<u>31,65,700</u>

(Source: The Silk & Rayon Textiles Export Promotion Council)

APPENDIX "19E"

STATEMENT SHOWING THE QUANTITY AND VALUE OF IMPORTS OF SILK & SILK RAYON
FABRICS INTO BRITISH EAST AFRICA DURING THE YEAR 1957, 1958 & 1959.

TANGANYIKA

Articles and countries of origin	Unit of Quantity	1957		1958		1959	
		Quantity	Value £	Quantity	Value £	Quantity	Value £
Silk Fabrics (pure or mixed)							
India	Sq. yd.	142	66	—	—	511	362
United Kingdom	" "	24	135	—	—	50	15
Hong Kong	" "	30	26	312	110	45	19
France	" "	—	—	—	—	—	—
Japan	" "	18,953	2,215	1,833	238	—	—
Other Countries	" "	7,542	2,503	5,302	2,870	1,616	948
Total		<u>26,691</u>	<u>4,945</u>	<u>7,447</u>	<u>3,218</u>	<u>2,222</u>	<u>1,344</u>
Fabrics of synthetic fibres and spun glass, (including artificial silk piecegoods)							
India	" "	89,453	4,593	33,735	3,033	67,973	6,231
United Kingdom	" "	149,096	17,620	96,485	11,522	42,667	6,199
United Kingdom (Government)	" "	144	156	3,539	504	41	7
Hongkong	" "	563,280	34,280	1,172	224	36,179	1,478
France	" "	11,292	3,387	2,917	790	893	225
Japan	" "	45,526,517	240,958	26,884,414	1,586,825	24,073,263	1,469,231
Germany (West)	" "	—	—	74,175	11,226	—	—
Italy	" "	—	—	41,791	6,881	—	—
Other Countries	" "	258,408	31,742	44,164	4,898	130,027	17,529
Total		<u>46,598,190</u>	<u>2,932,736</u>	<u>27,182,392</u>	<u>1,625,903</u>	<u>24,351,043</u>	<u>1,500,900</u>

APPENDIX "19F"

INDIAN EXPORTS TO TANGANYIKA DURING THE YEAR 1958

RAYONS	Value in Rs.
Rayon Sarees	928
Tafetta	1,485
Sharkskin	155
Rayon Piecegoods (n.e.s.)	7,866
Total	10,434
RAYON MANUFACTURES	
Ribbons	980
Socks	3,270
Hosiery	270
Garments	9,810
Total	14,330
SYNTHETIC FIBRE FABRICS	
Nylon Sarees	2,882
Nylon Piecegoods (n.e.s.)	3,006
Total	5,888
Grand Total for Rayons	30,652
SILK FABRICS	—
SILK MANUFACTURES	—

(Source: The Silk & Rayon Textiles Export Promotion Council)

APPENDIX "19G"

INDIAN EXPORTS TO TANGANYIKA DURING 1959

	Value in Rs.
RAYON FABRICS	
Saris	8,092
Crepe Saris	2,502
Palace Crepe	2,395
Tafetta	677
Rayon Rabrics (CM)	13,170
Rayon Fabrics (NES)	17,386
Total	44,222
NYLON	
Saris	1,746
Total	1,746
RAYON MANUFACTURES	
Lace	200
Garments	416
Total	616
Grand Total	46,584
SILK FABRICS	
Saris	2,423
Piecegoods	1,233
Total	3,656
MANUFACTURES	
Scarves	731
Neckties	1,300
Total	2,031
Grand Total for Silks	5,687

(Source: The Silk & Rayon Textiles Export Promotion Council)

APPENDIX 19"H

JAPANESE EXPORTS TO TANGANYIKA DURING 1959

RAYON					Value in U.S. Dollars
Georgette Crepe	..	..	..	..	18,000
Bemfany	..	..	..	..	4,000
Fancy Weave	..	..	..	..	29,000
Palace	..	..	..	..	38,000
Satin	..	..	..	..	74,000
Shioze	..	..	..	..	12,000
Tafetta	..	..	..	..	27,000
Twill	..	..	..	..	6,000
Voile	..	..	..	..	15,400
Habutae	..	..	..	..	9,000
Flat Crepe	..	..	..	..	21,000
Morocco Crepe	..	..	..	..	20,000
Fujiette	..	..	..	..	19,000
Sheer Crepe	..	..	..	..	5,000
Pique	..	..	..	..	1,000
Satin Crepe	..	..	..	..	2,000
Rayon gabs n.e.s.	..	..	..	..	91,000
					391,400
			Total		391,400
SPUN RAYON					
Fancy Weave	..	..	..	..	35,000
Gabardine	..	..	..	..	22,000
Gingham	..	..	..	..	206,000
Muslin	..	..	..	..	1,801,000
Poplin	..	..	..	..	135,000
Serge	..	..	..	..	317,000
Shirting	..	..	..	..	139,000
Tropical	..	..	..	..	14,000
Suiting	..	..	..	..	94,000
S. R. Fabs. n.e.s.	..	..	..	..	87,000
Linnet	..	..	..	..	5,000
Amuzen	..	..	..	..	1,000
					2,856,000
			Total		2,856,000

				Value in U.S. Dollars
SYNTHETIC FIBRE FABRICS				
Nylon Fabrics	..	..	..	232,000
Vinylidene Fabrics	..	..	..	2,000
Vinylnon Fabrics	..	..	..	1,000
Synthetic Fabrics n.e.s.	..	..	..	8,000
Total				<u>243,000</u>
Grand Total				<u><u>3,490,400</u></u>

(Source: The Silk & Rayon Textiles Export Promotion Council)

APPENDIX "19(I)"

STATEMENT SHOWING THE QUANTITY AND VALUE OF IMPORTS OF SILK & SILK RAYON
FABRICS INTO BRITISH EAST AFRICA DURING THE YEAR 1957, 1958 AND 1959.

UGANDA

Articles and countries of origin	Unit of Quantity	1957		1958		1959	
		Quantity	Value £	Quantity	Value £	Quantity	Value £
Silk Fabrics (pure or mixed)							
India	Sq. Yd.	829	170	1,479	653	1,008	437
United Kingdom	" "	—	—	—	—	—	—
Hong Kong	" "	—	—	—	—	—	—
France	" "	—	—	—	—	—	—
Japan	" "	26,553	2,442	1,550	344	—	—
Other Countries	" "	4,108	495	15	12	470	142
Total ..		31,490	3,107	3,044	1,009	1,478	579
Fabrics of synthetic fibres and spun glass, (including artificial silk piecegoods)							
India	" "	4,586	1,373	36,345	6,331	80,899	11,960
United Kingdom	" "	548,817	60,671	58,889	9,917	40,731	6,847
United Kingdom (Government)	" "	186	34	—	—	50	29
Hong Kong	" "	169,885	10,031	—	—	1,470	410
France	" "	10,689	3,786	2,902	1,008	1,876	515
Japan	" "	26,428,083	2,030,360	19,760,011	1,505,536	15,430,971	1,205,180
Germany (West)	" "	—	—	40,852	7,107	—	—
Italy	" "	—	—	53,849	11,217	—	—
Other Countries	" "	859,594	91,713	53,901	2,811	227,091	20,666
Total ..		28 021,840	2,197,968	20,006,749	1,543,927	15,783,088	1,245,607

APPENDIX "19J"

INDIAN EXPORTS TO UGANDA DURING THE YEAR 1958

RAYONS	Value in Rs.
Rayon Sarees	13,706
Rayon Piecegoods (n.e.s.)	1,964
Total	<u>15,670</u>
RAYON MANUFACTURES	
Garments	510
SYNTHETIC FIBRE FABRICS	
Nylon Sarees	1,776
Nylon Shirting	1,310
Total	<u>3,086</u>
Grand Total for Rayons	<u>19,266</u>
SILK FABRICS	
Sarees	3,079
Chiffon Sarees	169
Total	<u>3,248</u>
SILK MANUFACTURES	
Grand Total for Silks	<u>3,248</u>

(Source: The Silk & Rayon Textiles Export Promotion Council)

APPENDIX "19K"

INDIAN EXPORTS TO UGANDA DURING 1959

						Value in Rs.
RAYON FABRICS						
Saris	..	..	..	..	..	833
Suiting	..	..	..	..	..	185
Shirting	..	..	..	..	..	184
Rayon fabs. n.e.s.	..	..	..	..	..	1,175
					Total	<u>2,377</u>
NYLON						
Saris	..	..	..	..	..	1,616
Nylon fabs. (n.e.s.)	..	..	..	..	..	770
					Total	<u>2,386</u>
RAYON MANUFACTURES						Nil
Grand Total for Rayons					..	<u>4,763</u>
SILK FABRICS						
Saris	..	..	..	..	..	11,064
Piecegoods	..	..	..	..	..	288
					Total	<u>11,352</u>
MANUFACTURES						Nil
Grand Total for Silks					..	<u>11,352</u>

(Source :—The Silk & Rayon Textiles Export Promotion Council)

APPENDIX "19L"

JAPANESE EXPORTS TO UGANDA DURING 1959

RAYON					Value in U.S. \$
Flat Crepe	..	..	..	..	42,000
Fancy Weave	..	..	..	..	5,000
Shioze	..	..	..	..	10,000
Taffeta	..	..	..	..	17,000
Sheer Crepe	..	..	..	..	1,000
Palace	..	..	..	..	4,000
Satin	..	..	..	..	12,000
Fujiette	..	..	..	..	12,000
Georgette Crepe	..	..	..	..	2,000
Twill	..	..	..	..	6,000
Satin Crepe	..	..	..	..	1,000
Rayon fabs. NES	..	..	..	..	1,37,000
					<hr/>
			Total	..	2,49,000
					<hr/>
SPUN RAYON					
Linnet	..	..	..	..	24,000
Muslin	..	..	..	..	14,03,000
Poplin	..	..	..	..	4,37,000
Serge	..	..	..	..	1,99,000
Shirting	..	..	..	..	85,000
Tropical	..	..	..	..	8,000
Suiting	..	..	..	..	70,000
S.R. Fabs. NES	..	..	..	..	1,09,000
Fancy Weave	..	..	..	..	38,000
Gaberdine	..	..	..	..	6,000
Gingham	..	..	..	..	1,05,000
					<hr/>
			Total	..	24,84,000
					<hr/>
SYNTHETIC FIBRE FABRICS					
Nylon Fabs.	..	..	..	..	4,93,000
Synthetic Fabs. NES	..	..	..	..	8,000
					<hr/>
			Total	..	5,01,000
					<hr/>
			Grand Total	..	32,34,000
					<hr/>

(Source :—The Silk & Rayon Textiles Export Promotion Council)

APPENDIX "19M"

DIRECT IMPORTS INTO EAST AFRICA 1959

Fabrics of synthetic fibres and spun glass (including artificial silk piece-goods)

200

Source.	Unit of Quantity	KENYA		UGANDA		TANGANYIKA	
		Quantity	Value	Quantity	Value	Quantity	Value
United Kingdom	Sq. Yd.	391,402	48,021	40,731	6,847	42,667	6,199
United Kingdom (Government)	" "	4,014	951	50	29	41	7
Australia	" "	721	18	—	—	—	—
Eire	" "	611	114	—	—	—	—
Hong Kong	" "	16,091	2,268	1,470	410	36,179	1,478
India	" "	371,369	40,895	80,899	11,960	67,973	6,231
South Africa	" "	319	176	—	—	50	69
Austria	" "	8,851	1,515	2,564	309	1,402	194
Belgium	" "	9,610	2,267	—	—	1,099	393
Czechoslovakia	" "	246,039	10,976	143,665	—	—	—
France	" "	19,052	4,170	1,876	515	—	—
Germany (West)	" "	417,706	49,876	44,395	6,841	49,101	5,066
Indonesia	" "	17,414	2,724	—	—	3,673	305
Italy	" "	189,348	31,496	20,496	3,842	28,674	5,027
Japan	" "	19,832,376	1,407,596	15,430,971	1,205,180	24,073,263	1,469,231
Netherlands	" "	174,806	24,945	15,854	3,065	8,446	1,605
Spain	" "	954	145	—	—	—	—
Sweden	" "	232	211	—	—	—	—
Switzerland	" "	17,954	4,416	—	—	1,474	718
United States of America	" "	96,349	12,156	117	53	36,108	4,152
TOTAL—DIRECT IMPORTS ..		21,815,218	1,644,936	15,783,088	1,245,607	24,351,043	1,500,900
NET IMPORTS ..		15,540,374	1,046,864	24,188,442	1,852,443	22,220,533	1,492,136

APPENDIX "19N"

DIRECT IMPORTS INTO EAST AFRICA 1959

SILK FABRICS
(pure or mixed)

201

Source	Unit of Quantity	Kenya		Uganda		Tanganyika	
		Quantity	Value	Quantity	Value	Quantity	Value
United Kingdom	Sq. Yd.	415	630			50	15
Hong Kong	"					45	19
India	"	354	176	1,008	437	511	362
China	"			470	142	1,616	948
France	"	17	8				
Italy	"	300	65				
Japan	"	4,321	1,086				
Switzerland	"	51	21				
United States of America	"	2,250	141				
TOTAL— Direct Imports		7,708	2,127	1,478	579	2,222	1,344
Net Imports		8,880	2,771	1,706	807	822	472

APPENDIX "20"

**STATEMENT SHOWING RATES OF CUSTOMS DUTY ON IMPORTS
OF ART SILK TEXTILES, ETC. PREVALENT IN EAST AFRICA**

Item No.	Article.	Import Duty
PART IV. TEXTILES, APPAREL, YARNS & FIBRES		
39	Clothing and Blankets:—	
	(d) Stockings and hose.	Per pair, cents 25 (or 30% ad valorem, whichever is the greater).
	(e) Garments, made up, other n.e.s.	Each Sh. 1/50 (or 30% ad valorem, whichever is the greater).
40	Piecegoods (including scarves, Shukas, Chadders, Saris, Khangas, bed spreads and the like), n.e.s. :—	
	(a) Made of silk or material containing silk.	Per Sq. Yd. Sh. 2 (or 30% ad valorem, whichever is the greater).
	(b) x x x x	
	(c) x x x x	
	(d) Made of Artificial silk or synthetic fibres or admixtures of artificial silk or synthetic fibres with each other or with other material.	Per Sq. Yd. cents 80 (or 30% ad valorem, whichever is the greater).

APPENDIX "21"

LIST OF IMPORTERS, MERCHANTS OF SILK & RAYON TEXTILES

ZANZIBAR.

Adamji Wallijee & Sons,	Post Box No.	77,	Zanzibar.
Bhogilal Uttamchand,	„ No.	448,	Zanzibar.
Kersonji Muljibhai Patwa & Sons,	„ No.	288,	Zanzibar.
Chandulal Jayvat,	„ No.	274,	Zanzibar.
Ahmed Kasam Dhanji & Co.,	„ No.	313,	Zanzibar.
Himatlal Madhavji,	„ No.	274,	Zanzibar.
Naranji Amersey,	„ No.	360,	Zanzibar.
Taranchand Dharamchand,			Zanzibar.
Madhavji Kalidas Suchak,			Zanzibar.
Alibhoy Karimji Zariwala,	Post Box No.	386,	Zanzibar.
Abdul Hussain Mohmedally & Co.,	„ No.	115,	Zanzibar.
Mahamadally Suleman & Sons,			Zanzibar.
Abbas Brothers,	„ No.	304,	Zanzibar.
Manilal Chatrabhuj,	„ No.	224,	Zanzibar.
Gulam Hussain Ismail & Co.,	„ No.	35,	Zanzibar.
Zanzibar Silk Store,	„ No.	395,	Zanzibar.
Dhanamal Jhamandas,	„ No.	177,	Zanzibar.
Shah Anupchand Laxmichand & Co.,	„ No.	128,	Zanzibar.
H. R. Bhalloo,	„ No.	327,	Zanzibar.
M. R. Fazel & Co.,	„ No.	1119,	Zanzibar.
Laxmidas Madhavji Suchak,	„ No.	66,	Zanzibar.
Moloo Chattoo,	„ No.	382,	Zanzibar.
Abdulali Valjee & Sons,	„ No.	117,	Zanzibar.
Maganlal Jaychand Shah,	„ No.	331,	Zanzibar.
Jaffer Alloo,	„ No.	165,	Zanzibar.
Mawji Jiwandas & Sons,	„ No.	270,	Zanzibar.
Murarji Visanji & Sons,	„ No.	214,	Zanzibar.
Hansraj Mulji Morarj,	„ No.	169,	Zanzibar.

APPENDIX "22A"

INDIAN EXPORTS TO ZANZIBAR DURING THE YEAR 1958

RAYONS						Value in Rupees
Rayon	..	..	..	..	..	32,115
Crepe	..	..	..	..	..	28,546
Tafetta	..	..	..	..	..	3,706
Linen	..	..	..	..	..	28,226
Suiting	..	..	..	..	..	43,943
Chiffon	..	..	..	..	..	11,759
Ninon	..	..	..	..	..	2,909
Shirting	..	..	..	..	..	1,13,105
Georgette	..	..	..	..	..	172
Rayon Piecegoods (n.e.s.)	..	..	..	..	..	3,97,987
				Total		<u>6,62,468</u>
SPUN RAYON MANUFACTURES						
Handkerchieves	..	..	..	..	..	1,160
						<u> </u>
RAYON MANUFACTURES						
Hosiery	..	..	..	..	..	3,750
Garments	..	..	..	..	..	1,862
Ladies Handbag	..	..	..	..	..	390
				Total		<u>6,002</u>
SYNTHETIC FIBRE FABRICS						
Nylon Sarees	..	..	..	..	..	5,220
Nylon Piecegoods (n.e.s.)	..	..	..	..	..	7,909
				Total		<u>13,129</u>
				Grand Total for Rayons		<u>6,82,759</u>

						Value in Rs.
SILK FABRICS						
Sarees	..	..	..	..	..	47,005
Piecegoods	..	..	..	..	..	366
Total						<u>47,371</u>
 SILK MANUFACTURES						
Garments	..	..	..	..	..	1,264
Grant Total for Silks						<u>48,635</u>

Source: The Silk & Rayon Textiles Export Promotion Council)

APPENDIX "22B"

INDIAN EXPORTS TO ZANZIBAR DURING 1959

RAYON FABRICS						Value in Rupees.
Saris	..	..	..	..	..	25,991
Crepe Saris	..	..	..	..	..	3,142
Palace Saris	..	..	..	..	..	2,610
Crepe	..	..	..	..	..	44,990
Palace	..	..	..	..	..	49,067
Satin	..	..	..	..	..	7,559
Tafetta	..	..	..	..	..	5,626
Brocade	..	..	..	..	..	2,648
Chiffon	..	..	..	..	..	5,830
Doria	..	..	..	..	..	14,067
Poplin	..	..	..	..	..	12,283
Lungi	..	..	..	..	..	2,621
Rayon fabrics (SR)	..	..	..	..	..	3,390
Lungi (CM)	..	..	..	..	..	7,902
Rayon fabrics (CM)	..	..	..	..	..	15,297
Rayon fabrics (NES)	..	..	..	..	..	348,923
					Total	<u>551,946</u>
 NYLON FABRICS						
Nylon	..	..	..	..	..	20,149
					Total	<u>20,149</u>
 RAYON MANUFACTURES						
Hosiery	..	..	..	..	..	650
Handkerchieves (Nylon)	..	..	..	..	..	138
Turbans	..	..	..	..	..	815
Garments	..	..	..	..	..	747
					Total	<u>2,350</u>
					Grand Total for Rayons	<u><u>5,74,445</u></u>

						Value in Rs.
SILK FABRICS						
Saris	..	..	..	..	..	39,915
Piecegoods	..	..	..	..	..	23,729
Total						<u>63,644</u>
MANUFACTURES						
Scarves	..	..	..	..	..	333
Grand Total for Silks						<u>63,977</u>

(Source: The Silk & Rayon Textiles Export Promotion Council)

APPENDIX "22C"

JAPANESE EXPORTS TO ZANZIBAR DURING 1959.

RAYON					Value in U.S. \$
Befany	..	..	..	..	300
Fancy Weave	..	..	..	..	3,000
Satin	..	..	..	..	22,000
Tafetta	..	..	..	..	17,000
Fujiette	..	..	..	..	2,000
Pique	..	..	..	..	400
Shioze	..	..	..	..	5,000
Voile	..	..	..	..	6,000
Habutae	..	..	..	..	2,000
Palace	..	..	..	..	4,000
Flat Crepe	..	..	..	..	2,000
Georgette Crepe	..	..	..	..	300
Sheer Crepe	..	..	..	..	400
Twill	..	..	..	..	200
Rayon fabs. (NES)	..	..	..	..	41,000
				Total	105,600
SPUN RAYON					
Muslin	..	..	..	..	109,000
Poplin	..	..	..	..	10,000
Shirting	..	..	..	..	5,000
Suiting	..	..	..	..	6,000
Serge	..	..	..	..	7,000
Fancy weave	..	..	..	..	1,000
Gingham	..	..	..	..	400
S.R. fabs. (N.E.S.)	..	..	..	..	4,000
				Total	142,400
SYNTHETIC FIBRE FABRICS					
Nylon fabs.	..	..	..	..	38,000
Vinylidene fabs	..	..	..	..	400
Synthetic fabs. (NES)	..	..	..	..	1,000
				Total	39,400
				Grand Total	287,400

(Source: The Silk & Rayon Textiles Export Promotion Council)

APPENDIX "23"

**A TABLE SHOWING COMPARISON OF PRINCIPAL TEXTILE
IMPORTS FROM PRINCIPAL TEXTILE COUNTRIES
DURING THE YEAR 1957, 1958 & 1959**

	United Kingdom	India	Japan	Nether- land	Germany	Italy
1957	£	£	£	£	£	£
Cotton Piecegoods	15,031	86,913	25,808	5,626	184	300
Printed Khangas	1,388	131	229,657	3,745	—	—
Silk & Art Silk Piecegoods	10,263	6,422	237,404	5,522	6,021	17,648
1958						
Cotton Piecegoods	13,252	28,988	26,679	2,143	337	41
Printed Khangas	55	—	73,834	3,999	—	—
Silk & Art Silk Piecegoods	4,120	6,649	123,784	2,572	7,490	8,699
1959						
Cotton Piecegoods	9,881	84,266	35,338	4,162	270	21
Printed Khangas	29	760	68,835	10,840	—	—
Silk & Art Silk Piecegoods	3,091	9,902	130,945	1,784	4,841	6,242

(Source : Department of Finance, Zanzibar)

APPENDIX "24"

A TABLE SHOWING DOMESTIC EXPORTS FROM ZANZIBAR TO
DIFFERENT COUNTRIES DURING 1957, 1958 & 1959.

DOMESTIC EXPORTS

			1957	1958	1959
			£	£	£
United Kingdom	..	..	109,867	156,187	174,956
India	..	..	1,317,991	931,801	664,669
Japan	..	..	29,408	39,469	45,770
Holland	..	..	25,092	27,404	120,185
Germany	..	..	36,312	143,433	167,728
Italy	..	..	17,692	35,175	53,235

INDIA

			Cloves	Copra
1957	..	..	£ 1,173,432	£ 127,818
1958	..	..	363,363	561,156
1959	..	..	281,097	377,512

(Source: Department of Finance, Zanzibar)

APPENDIX "25"

IMPORTERS OF ART SILK TEXTILES & COMMISSION AGENTS

MAURITIUS

Bhimbhai Naik & Co.,	19, Corderie Street, Fort Louis.
M. Tulsidas & Co.,	Desforges Street, Fort Louis,
A. C. Cassam & Co.,	7, Edith Cavell Street, Port Louis.
Chettiar & Co.,	12, Corderie Street, Port Louis.
J. Beeneesreasing,	Crystal House, 29, Desforges Street, Port Louis.
M. I. Ghanty & Sons Ltd.,	Cr. of Louis Pasteur & Farquhar Street, Port Louis.
Dawood M. Moollan & Co.,	17, Desforges Street, Port Louis.
I. A. Bahomia & Co.,	23, Royal Street, Port Louis.
I. A. Ghanty & Co.,	26, Corderie Street, Port Louis.
O. Hassamal & Co.,	51, Desforges Street, Port Louis.
M. A. Nazroo & Co.,	Bourbon Street, Port Louis.
E. M. Manjoo & Co.,	Corderie Street, Port Louis.
Hassim Timol & Co.,	P.O. Box No. 12, Port Louis.
Dawood & Co.,	P.O. Box No. 75, Port Louis.
General Trade Imports,	P.O. Box No. 307, Port Louis.
R. G. Desai & Co.,	9, Corderie Street, Port Louis,
K. Kalachand & Co.,	Royal Road, Curepipe.
Soobhan & Co.,	Royal Road, Rose-Hill.
Shams H. Yadallee,	29, Corderie Street, Port Louis.
R. N. Varma,	60, Desforges Street, Port Louis.
Bhimbhai Nathoobhai & Co.,	11, Corderie Street, Port Louis.
Adam S. Moollan & Co.,	15, Desforges Street, Port Louis.
M. H. Moosa & Sons,	30, Louis Pasteur Street, P.O. Box 82, Port Louis.

Magasin Rajwani,	47, Desforges Street, Port Louis.
B. M. Desai & Co.,	10, Corderie Street, Port Louis.
*Rossenkhan & Co.	P.O. Box No. 118, Port Louis.
*A. C. A. Carrim & Sons	„ 124, „
*General Overseas Trading Agency,	„ 41, „
*Issop Hassam Rajah	„ 126, „
*G.M.I. Rajah	„ 21, „
*Abdulla Son	„ 300, „
*Dahal Brothers	„ 249, „
*M. I. Simjee	„ 313, „
*Ajum Hossen Hatteea	„ 169, „
*Cassam Sulliman Son,	„ 182, „
*Cassam Hassam & Co.	„ 73, „
*General Trade Imports Ltd.	„ 307, „
*S. Dawood & Co.,	„ 75, „
*S. C. Seedat & Co.,	„ 150, „
*Barbes Pougnet	„ 146, „
*Hansrod	„ 174, „
*Esmile Baziz & Co.	„ „
*N. K. Desai & Co.	„ 214, „
*D. D. Desai	
*World Commerce Agencies,	24, Louis Pasteur St., Port Louis.
*British Imperial Trading Agency,	65, Inkerman Street, Rose Hill.
*O. Hassamal & Co.	51, Desforges St., Port Louis.
*Dawood Diwanjee.	

* Denotes Commission Agents.

APPENDIX "26A"

MAURITIUS

Statement showing the Imports of Silk and Art Silk Yarn, Silk and Art Silk piecegoods, and manufactures thereof into MAURITIUS, during the years 1957 and 1958.

		Year 1957		Year 1958	
		Quantity	Value in Rs.	Quantity	Value in Rs.
1. TEXTILE YARN AND THREAD					
Thrown silk and other silk yarn					
Thrown silk and other silk yarn and thread (including schappe & bourette).					
United Kingdom	Kgs.	39	1,859	99	5,487
Hong Kong	"	11	119	4	30
France	"	1	31	—	—
		51	2,009	103	5,517
2. Yarn and thread of synthetic fibres.					
United Kingdom	Kgs.	228	7,487	260	7,313
Canada	"	1	29	—	—
India	"	20	472	—	—
Union of South Africa	"	27	514	12	568
France	"	—	—	3	220
Germany (Western)	"	37	1,212	—	—
		Kgs. 313	9,714	275	8,101
3. Textile fabrics of Standard Type (not including narrow and special fabrics) other than Cotton fabrics.					
Silk fabrics.					
United Kingdom	S. Mts.	476	4,847	8	153
Union of South Africa	"	8	65	—	—
France	"	28	505	12	214
Switzerland	"	14	167	—	—
		526	5,584	20	367

	Year 1957		Year 1958	
	Quantity	Value in Rs.	Quantity	Value in Rs.
4. Fabrics of Synthetic bres and spun Glass.				
United Kingdom	1,121,568	22,31,460	786,643	17,27,520
Australia	—	—	21	143
Hong Kong	22,922	38,224	9,259	26,298
India	94,862	1,46,095	1,073,844	1,561,108
Union of South Africa	109	581	5,112	7,307
Belgium	—	—	1,953	12,203
China	1,619	4,642	547	2,493
Czechoslovakia	17,563	15,994	2,715	2,266
France	8,996	61,827	6,307	37,845
Germany (Western)	4,091	18,444	17,629	44,055
Holland	—	—	1	22
Hungary	—	—	—	—
Italy	2,058	7,931	4,951	12,378
Japan	982,367	10,76,627	1,529,479	13,73,050
Poland	20,433	24,307	—	—
Spain	2,768	2,225	—	—
Switzerland	74	668	1,572	7,642
U.S.A.	—	—	5	35
TOTAL	2,279,430	36,29,025	3,440,038	48,14,365

5. Clothings n.e.s. of Silk or Artificial Silk.				
United Kingdom	—	1,38,493	—	1,71,275
Australia	—	166	—	—
British West Indies	—	—	—	1,967
Canada	—	—	—	144
Hong Kong	—	58,570	—	33,396
India	—	2,86,269	—	4,46,037
Kenya	—	—	—	60
Union of South Africa	—	7,302	—	1,399
Austria	—	—	—	141
China	—	322	—	837
France	—	16,030	—	15,604
Germany (West)	—	683	—	2,620
Holland	—	331	—	—
Italy	—	3,054	—	586
Japan	—	19,474	—	17,236
Madagascar	—	57	—	—
Switzerland	—	1,519	—	557
U.S.A.	—	102	—	—
TOTAL	—	5,32,372	—	6,91,859

APPENDIX "26B"

INDIAN EXPORTS TO MAURITIUS DURING THE YEAR 1958.

RAYONS					Value in Rupees.
Rayon Sarees	..	..	..	..	1,25,309
Crepe	..	..	..	..	57,131
Dorio	..	..	..	..	5,550
Satin	..	..	..	..	24,090
Taffeta	..	..	..	..	3,957
Linen	..	..	..	..	79,040
Coating	..	..	..	..	3,618
Brocade	..	..	..	..	10,554
Chiffon	..	..	..	..	29,163
Ninon	..	..	..	..	13,835
Shirting	..	..	..	..	15,115
Lining	..	..	..	..	1,725
Organdi	..	..	..	..	13,878
Georgette	..	..	..	..	8,592
Sheoze	..	..	..	..	1,017
Rayon Piecegoods (NES)	..	..	..	..	12,49,959
				Total	16,42,533
<hr/>					
SPUN RAYONS					
Piecegoods (Rayon & Cotton Mixed)	..			..	335
<hr/>					
RAYON MANUFACTURES					
Ladies' Handbag	..	..	..	..	1,462
<hr/>					
SYNTHETIC FIBRE FABRICS					
Nylon Sarees	..	..	..	..	89,351
Nylon Shirting	..	..	..	..	7,489
Nylon Piecegoods (NES)	..	..	..	..	3,41,121
				Total	4,37,961
<hr/>					
SYNTHETIC FIBRE MANUFACTURES					
Socks	..	..	..	..	12,714
				Grand Total for Rayons	20,95,005
<hr/>					

	Value in Rs.
SILK FABRICS	
Sarees	19,640
SILK MANUFACTURES	<u> </u>
Grand Total for Silks ..	<u>19,640</u>

(Source : The Silk & Rayon Textiles Export Promotion Council)

APPENDIX "26C"

INDIAN EXPORTS TO MAURITIUS DURING 1959.

RAYON FABRICS					Value in Rupees.
Saris	..	..	..	..	34,176
Satin	..	..	..	..	17,640
Taffeta	..	..	..	..	1,498
Shantung	..	..	..	..	1,432
Velvet	..	..	..	..	3,438
Rayon fabs. (NES)	..	..	..	..	4,62,904
			Total	..	<u>5,21,088</u>
 NYLON FABRICS					
Saris	..	..	..	..	16,648
Dorio	..	..	..	..	3,950
Velvet	..	..	..	..	1,950
Nylon fabs. (NES)	..	..	..	..	1,82,937
			Total	..	<u>2,05,485</u>
			Grand Total for Rayons	..	<u>7,26,573</u>
 SILK FABRICS					
Saris	..	..	..	..	33,387
Piecegoods	..	..	..	..	2,224
			Total	..	<u>35,611</u>
 MANUFACTURES					
Garments	..	..	..	..	315
			Total	..	<u>315</u>
			Grand Total for Silks	..	<u>35,926</u>

(Source : The Silk & Rayon Textiles Export Promotion Council)

APPENDIX "26D"

JAPANESE EXPORTS TO MAURITIUS DURING 1959.

				Value in U.S. \$.
RAYONS	..	..	..	Nil
SPUN RAYON				
Muslin	..	..	..	19,000
Suiting	..	..	..	23,000
Fancy Weave	..	..	..	2,000
Poplin	..	..	..	2,000
Serge	..	..	..	6,000
Tropical	..	..	..	1,000
			Total	<hr/> 53,000 <hr/>
SYNTHETIC FIBRE FABRICS				
Nylon fabs.	..	..	..	2,000
			Grand Total	<hr/> 55,000 <hr/>

(Source : The Silk & Rayon Textiles Export Promotion Council)

APPENDIX "27"

**FORM OF INVOICE FOR GOODS EXPORTED TO THE
COLONY OF MAURITIUS.**

(Place and Date) _____ 196_____

*State here
general nature
or class of goods.

* INVOICE of _____ Consigned
by _____ of _____
to _____ of _____
shipped per S./S. _____
Order No. _____

Country of Origin.	Marks and numbers on packages.	Quantity and Description of Goods.	* Selling Price to Purchaser.	
			@	Amount

* — F.o.b., c.i.f. or c.i.f.c.i.

Enumerate the following charges and state whether each amount has been included in or excluded from the above selling price to purchaser.

State if included in above selling price.
--

- (1) Sea Freight
- (2) Marine Insurance

APPENDIX "27"

COMBINED CERTIFICATE OF VALUE AND OF ORIGIN AND
INVOICE OF GOODS FOR EXPORTATION TO MAURITIUS.

1. Here insert Name of Manager Chief clerk or as the case may be. I _____ (1) _____ of (2) _____ of (3) _____ manufacturer/supplier of the goods enumerated in this invoice, amounting to Rs. hereby declare that I [(4) have the authority to make and sign this certificate on behalf of the aforesaid manufacturer/supplier and that I] have the means of knowing and do hereby certify as follows :—
2. Here insert Name of firm or Company.
3. Here insert name of city or country.
4. These words should be omitted where the manufacturer or supplier himself signs the certificate.

VALUE

1. That this invoice is in all respects correct, and contains a true and full statement of the price actually paid or to be paid for the said goods, and the actual quantity thereof.
2. That no different invoice of the goods mentioned in the said invoice has been or will be furnished to any one; and that no arrangements or understanding affecting the purchase price of the said goods have been or will be made or entered into between the said exporter and purchaser or by anyone on behalf of either of them either by way of discount, rebate, compensation or in any manner whatever, other than as fully shown in this invoice, or as follows :—
5. Here insert Particulars of any special arrangement. (5) _____

3. The F.O.B. value shown includes any purchasing or agents' commission, the cost of packages and packing for export, carriage to the port of shipment, and all other expenses incidental to placing the goods on board ship.

ORIGIN

(Delete whichever of 4(a) or 4 (b) is not applicable. If 4(a) is used delete 5 and 6. If 4 (b) is used insert required particulars in 5 and 6).

6. Insert name of country.

4. (a) That every article mentioned in the said invoice has been wholly produced or manufactured in (6)

4. (b) That every article mentioned in the said invoice has been either wholly or partially produced or manufactured in (6)

5. As regards those articles only partially produced or manufactured in (6)

(a) That the final processes of manufacture have been performed in the country.

(b) That the expenditure in material produced in (6) and/or labour performed in (6) calculated subject to qualification hereunder, in each and every article is not less than (7) of the factory or works cost of such article in its finished state (See Note below).

7. Insert 25%, 50%, or 75% as the case may be according to the provisions Regulation 4 of the Customs Tariff Regulations, 1954.

6. That in the calculation of such proportion of produce or labour of the (6) none of the following item has been included or considered :-

“Manufacturer’s profit or remuneration of any trader agent, broker or other person dealing in the article in their finished condition; royalties; cost of outside packages or any cost of packing the goods thereinto; any cost of conveying insuring or Shipping the goods subsequent to their manufacture.”

NOTE.—In the case of goods which have at some stage entered into the commerce of/or undergone a process of manufacture in a foreign country, only that labour and material which is expended on or added to the goods after their return to (6) shall be regarded as the produce or manufacture of (6) in calculating the proportion of (6) labour and material in the factory or works cost of the finished article.

Dated at _____ this _____ day of _____ 19__

Witness _____ Signature _____

APPENDIX "28"

LIST OF IMPORTERS OF SILK AND ART SILK RAYON TEXTILES

ADDIS ABABA. (ETHIOPIA)

Shantilal & Co. (Eth.) Ltd.,	P.O. Box No. 1744, Addis Ababa
Akbarally Kamroudin & Co.,	P.O. Box No. 230, Addis Ababa
Akberally Vazirally Mody & Co.,	P.O. Box No. 304, Addis Ababa
Dalpat Kapurchand Doshi,	P.O. Box No. 158, Addis Ababa
Garabedian Edouard,	P.O. Box No. 184, Addis Ababa
Keshavlal Talakchand,	P.O. Box No. 1832, Addis Ababa
Kordaaz Pavlos,	P.O. Box No. 455, Addis Ababa
Alex Karibian Bros.,	P.O. Box No. 1018, Addis Ababa
Nagindass Bros.,	P.O. Box No. 839, Addis Ababa
Premjee J. & Sons,	P.O. Box No. 1067, Addis Ababa
Ahmedally Shamsuddin & Co.,	P.O. Box No. 148, Addis Ababa
Sharafally Mohammed Ali & Co.,	P.O. Box No. 202, Addis Ababa
J. J. Kothari,	P.O. Box No. 171, Addis Ababa
S. M. Patel & Co.,	P.O. Box No. 526, Addis Ababa
Kantilal Hanaraj Damani,	P.O. Box No. 974, Addis Ababa
Ahmed Sherian Mohammed,	P.O. Box No. 540, Addis Ababa
Saleh Nadji Sabha,	P.O. Box No. 471, Addis Ababa
Moolchand Devjee,	P.O. Box No. 1818, Addis Ababa
Gabre Banjaw,	Mesfine Harrar St., Addis Ababa
Gandhi & Co.,	Addis Ketoma, Addis Ababa
*G. K.Ramanuj,	P.O. Box No. 294, Addis Ababa
*Shantilal Valjee Desai,	P.O. Box No. 900, Addis Ababa
*V. A. Premjee,	P.O. Box No. 305, Addis Ababa
*Strainasacchi, Gdovanni (Dr.),	P.O. Box No. 828, Addis Ababa
*Nandlal B. Mehta,	P.O. Box No. 1387, Addis Ababa
*Jayantilal B. Kamdar,	P.O. Box No. 478, Addis Ababa
*Samant K. Desai & Co.,	P.O. Box No. 474, Addis Ababa
*Zaki R. Elmasry,	P.O. Box No. 1556, Addis Ababa
*Delbounge E. M. & Sons (Eth.) Ltd.	P.O. Box No. 1890, Addis Ababa
*Behensilian Samuel & Sons,	P.O. Box No. 1094, Addis Ababa
Chaturbhai Purshottamdas Patel,	P.O. Box No. 1138, Addis Ababa
Chhaganlal Jagjiwan Bavishi,	P.O. Box No. 730, Addis Ababa

* Denotes Commission Agents.

APPENDIX "29A"

**STATEMENT SHOWING THE COUNTRYWISE IMPORTS OF SILK
AND ART SILK MANUFACTURES, SILK AND ART SILK
PIECEGOODS AND SILK AND ART SILK YARN
INTO ETHIOPIA DURING THE PERIOD
11TH SEPTEMBER 1957 to 10TH
SEPTEMBER 1958**

54. SILK AND ART SILK MANUFACTURES:	Quantity	Value in Eth. Dollars.
Aden	—	45,060
Arabia	—	1,472
Belgium	—	3,333
China	—	737
Denmark	—	934
Kenya	—	60
France	—	31,759
Germany	—	368,804
Holland	—	4,777
India	—	23,615
Italy	—	379,220
Japan	—	1,018,444
Israel	—	3,481
British Somaliland	—	233
French Somaliland	—	4,044
South Africa	—	803
Sweden	—	2,685
Switzerland	—	4,644
United Kingdom	—	75,316
United States of America	—	96,246
Yemen	—	468
Other Countries in Europe	—	28,804
Other Countries in Africa	—	1,000
Other Countries in Asia	—	19,209
Greece	—	1,562
Hongkong	—	137,579
Czechoslovakia	—	68,088
Total		2,322,377

55. SILK AND ART SILK PIECEGOODS :				Sq. Metres	Value in Eth. Dollars.
Aden	..	..	..	7,281	6,722
Arabia	..	..	..	22	72
Belgium	..	..	..	4,049	5,770
France	..	..	..	8,923	23,572
Germany	..	..	..	436,088	354,171
Holland	..	..	..	7,153	16,506
India	..	..	..	29,243	23,582
Italy	..	..	..	78,170	137,930
Japan	..	..	..	4,111,047	2,684,518
Sudan	..	..	..	1,422	725
Switzerland	..	..	..	448	1,420
United Kingdom	..	..	..	15,038	18,490
United States of America	..	..	..	85,565	113,377
Other Countries in Europe	..	..	..	11,245	39,667
Other Countries in Asia	..	..	..	662	1,481
Hongkong	..	..	..	1,970	1,470
Czechoslovakia	..	..	..	1,054	1,491
Total				4,799,380	3,435,964

56. SILK AND ART SILK YARNS :				Kilos	
Australia	..	..	..	40	590
Germany	..	..	..	438,144	623,936
India	..	..	..	2,223	18,738
Italy	..	..	..	153,918	490,133
Japan	..	..	..	4,000	22,990
Sudan	..	..	..	38	84
United Kingdom	..	..	..	10	1,358
Greece	..	..	..	884	3,515
Total				599,257	1,161,344

APPENDIX "29B"

INDIAN EXPORTS TO ETHIOPIA DURING THE YEAR 1958

RAYONS :				Value in Rupees.	
Taffeta	..	..	..	..	1,519
Boski	..	..	..	..	1,934
Rayon Piecegoods (n.e.s.)	..	..	..	..	59,435
			TOTAL	..	<u>62,888</u>
SPUN RAYONS :					
Spun Piecegoods (n.e.s.)	..	..	..	..	7,090
Piecegoods (Rayon & Cotton Mixed)	..	..	..	..	1,076
			TOTAL	..	<u>8,166</u>
SYNTHETIC FIBRE FABRICS :					
—					
SYNTHETIC FIBRE MANUFACTURES :					
Socks	..	..	..	..	1,729
			Grand Total For Rayons	..	<u>72,783</u>
SILK FABRICS :					
—					
SILK MANUFACTURES :					
—					

APPENDIX "29C"

INDIAN EXPORTS TO ETHIOPIA DURING 1959

RAYON FABRICS :				Value in Rupees
Odhani	..	..	..	1,516
Rayon fabs. (SR)	..	..	..	12,515
Rayon fabs. (NES)		..	..	34,399
			TOTAL	<u>48,430</u>
 NYLON FABRICS :				
Nylon	..	..	..	63,934
			TOTAL	<u>63,934</u>
 RAYON MANUFACTURES :				
Hosiery	..	..	..	888
			TOTAL	<u>888</u>
			Grand Total for Rayons	<u>1,13,252</u>
 SILK FABRICS :				
Saris	..	..	..	900
			TOTAL	<u>900</u>
 MANUFACTURES :				
Scarves	..	..	..	165
Stoles	..	..	..	1,103
			TOTAL	<u>1,268</u>
			Grand Total for Silks	<u>2,168</u>

APPENDIX "29D"

JAPANESE EXPORTS TO ETHIOPIA DURING 1959.

RAYON :					Value in U.S. \$.
Flat Crepe	..	..	..	..	12,000
Fancy weave	..	..	..	..	3,400
Fujiette	..	..	..	..	44,000
Shioze	..	..	..	..	7,000
Sheer Crepe	..	..	..	..	9,300
Satin	..	..	..	..	1,10,000
Taffeta	..	..	..	..	24,000
Voile	..	..	..	..	34,000
Habutae	..	..	..	..	8,800
Georgette Crepe	..	..	..	..	1,200
Palace	..	..	..	..	1,100
Bemfany	..	..	..	..	1,000
Twill	..	..	..	..	2,000
Rayon fabs. NES	..	..	..	..	69,000
					<hr/>
			TOTAL	..	3,26,800
 SPUN RAYON :					
Fancy weave	..	..	..	..	21,000
Serge	..	..	..	..	1,03,000
S.R. Fabs. NES	..	..	..	..	1,17,000
Gaberdine	..	..	..	..	9,000
Gingham	..	..	..	..	4,000
Linnet	..	..	..	..	4,000
Muslin	..	..	..	..	53,000
Poplin	..	..	..	..	7,000
Shirting	..	..	..	..	4,000
Tropical	..	..	..	..	1,000
Suiting	..	..	..	..	57,000
					<hr/>
			TOTAL	..	3,80,000
 SYNTHETIC FIBRE FABRICS :					
Nylon fabs.	..	..	..	..	1,74,000
Vinylidene fabs.	..	..	..	..	1,000
					<hr/>
			TOTAL	..	1,75,000
					<hr/>
			Grand Total	..	8,81,800
					<hr/>

APPENDIX "29E"

ETHIOPIA

TOTAL IMPORTS OF SILK AND ARTIFICIAL PIECEGOODS,
SILK AND ART SILK MANUFACTURES, AND SILK AND
ART SILK YARN, INTO ETHIOPIA, DURING THE
YEARS 1957; 1958; and 1959 (PERIOD 11TH
SEPTEMBER TO 30TH SEPTEMBER).

	1957		1958		1959	
	(Quant- ty in thousand Sq. Metres)	Value in Ethio- pian Dollars	(Quant- ty in thousand Sq. Metres)	Value in Ethio- pian Dollars	(Quant- ty in thousand Sq. Metres)	Value in Ethio- pian Dollars
Silk & Art Silk Piecegoods	5000	3653098	4799	3435964	4143	2782689
Silk & Art Silk Manufactures	—	2556007	—	2322377	—	3806119
Silk & Art Silk Yarn	*1013	1539220	*599	1161344	*231	658414

Note : * Yarn in thousand Kilos.

RE-EXPORTS FROM ETHIOPIA.

	1956	1957	1958	1959
	Value in Ethiopian Dollars.	Value in Ethiopian Dollars.	Value in Ethiopian Dollars.	Value in Ethiopian Dollars.
Silk Manufactures	283	80	160	365

APPENDIX "30"

**STATEMENT SHOWING RATES OF CUSTOMS DUTY ON
IMPORTS OF ART SILK TEXTILES, ETC. PREVALENT IN
ETHIOPIA**

Tariff No.	Commodity	Unit.	Duty. (In Ethiopian Dollars.
121	SILK & ARTIFICIAL SILK & MANU- FACTURES THEREOF. (including these mixed with any other fibre).		
	Clothing and sewn articles including household linen,		
	(a) Natural Silk	Ad-Valorem	65%
	(b) Artificial Silk	Ad-Valorem	55%
	(c) Natural or Artificial Silk mixed with cotton	Ad-Valorem	55%
	(d) Natural or Artificial Silk mixed with other fibres	Ad-Valorem	55%
	(e) Secondhand clothing of silk, arti- ficial silk and mixtures thereof	Per Kg.	3.00
122	Crepe :		
	(a) Natural Silk	Ad-Valorem	65%
	(b) Artificial Silk	Per Sq./Metre	0.65
	(c) Natural or Artificial Silk mixed with other fibres	Ad-Valorem	55%
123	Hosiery; including Socks, Stockings, Ties and Gloves :		
	(a) Natural Silk	Ad-Valorem	65%
	(b) Artificial Silk	Ad-Valorem	55%
	(c) Natural or Artificial Silk mixed with other fibres	Ad-Valorem	55%
124	Piece Goods :		
	(a) Natural Silk	Ad-Valorem	65%
	(b) Artificial Silk	Per Sq. Metre	0.60

Tariff No.	Commodity	Unit.	Duty. (In Ethiopian Dollars.)
	(c) Natural Silk and wool or vegetable fibre	Ad-Valorem	55%
	(d) Artificial Silk and wool or vegetable fibre	Ad-Valorem	55%
	(e) Natural and Artificial Silk	Ad-Valorem	55%
	(f) Natural Silk and Cotton	Ad-Valorem	55%
	(g) Artificial Silk and Cotton	Ad-Valorem	55%
	(h) Silk bolting cloth for industrial purposes	Ad-Valorem	10%
	(i) Others n.c.e.	Ad-Valorem	65%
125	Velvets and Plushes and other pile cloth, pure or mixed	Ad-Valorem	55%
126	Yarns :		
	(a) Natural Silk	Ad-Valorem	40%
	(b) Artificial Silk	Ad-Valorem	35%
	(c) Rayon cut staple fibre for manufacturing purposes	Per Kg.	0.10
127	Silk goods and manufactures thereof n.e.e.		
	(a) Natural Silk	Ad-Valorem	60%
	(b) Artificial Silk	Ad-Valorem	55%

Note :—Rayon and Nylon manufactures will be classified as Artificial Silk.

APPENDIX "31"

ADEN

LIST OF IMPORTERS & MERCHANTS OF SILK AND RAYON TEXTILES

	P.O. Box No.	
Jethalal Laxmichand	144,	Aden.
Gopaldas Chhagan Siraj	34,	"
Manmohandas Lavchand	111,	"
Kantilal & Co.	105,	"
Harjivan Morarjee	151,	"
Tribovan Kapurchand Doshi	211,	"
Ali Abdulla Alasayi & Co.,	71,	"
Chhaganlal Savchand,	268,	"
M. M. Samuelson & Co.,	107,	"
S. M. Patel & Co.,	22,	"
Vora Valabhjee Tarachand,	10,	"
Prabhudas Morarjee	222,	"
P. M. Patel	169,	"
A. K. H. Vasi & Co. (Aden) Ltd.,	30,	"
Omar Kassim Aleysayi	167,	"
Hirachand Ravnut Batavia,	74,	"
Chhotalal Samjee Virani (Aden) Ltd.,		
J. Zaverchand, Cloth Bazar, Crater, Aden.		
Saifee Stores, Bohra Bazar, Crater, Aden.		
Kachins, Bohra Bazar, Crater, Aden.		
Impex International, Sec. A/3, Crater, Aden.		
A. H. Broachwals, Dana Bazar, Crater, Aden.		
Vassenjee Laljee, Sec. A/2, Crater, Aden.		
Prabhudas Purshottam, Dana Bazar, Crater, Aden.		
Abdul Gani Abdul Gaffor, Aden Camp.		
International Mercantile Corporation, Aden.		
A. M. Khat Khat, Aden.		
Indian Handloom Goods Emporium, Crater, Aden.		
R. Harraram, Aden.		
A. M. Tapia, P.O. Box No. 98, Dana Bazar, Aden.		
Vasvani Traders, Aden.		
Gulabchand Panachand, P.O. Box No. 69, Aden.		
Ahmed Mohamed Ali Absi, Luhar Galli, Section B, St. No. 5, Aden Camp.		
Cher-Vous, Steamer Point, Aden.		
Husainbhai Merali Doosa, P.O. Box No. 361, Aden Camp.		
Ahmed Haji Ismail, P.O. Box No. 32, Dana Bazar, Aden.		

*Imperial Exporters & Importers,	P.O. Box No. 220,	Aden.
*P. P. Mehta	” 2,	”
*Tarachand Popatlal	” 67,	”
*P. T. Vakharia	” 180,	”
*Shah Pannachand Manekchand	” 187,	”

* Denotes Commission Agents.

(Source: The Chamber of Commerce)

APPENDIX "32(A)"

ADEN

Comparative Statement showing decline in Imports of Silks in Aden,
for the years 1955 to 1959.

	1955	1956	1957	1958	1959
Japan	172,092	77,098	162,451	15,194	1,420
India	572	4,065	480	2,962	963
France	2,375	4,931	3,895	9,975	2,433
Other Countries	147,967	112,029	62,472	86	3,152
Total	323,006	198,123	229,298	28,217	7,968

ADEN

Statistics of Countrywise Imports of Rayon Textiles into Aden,
for the years 1956 to 1959.

	1956	1957	1958	1959
	(Value in Thousand Pound Sterling)			
Japan	1,174	1,680	1,352	1,502
Syria	197	124	248	129
France	41	69	54	61
India	48	62	1,059	372
Other Countries	375	248	255	187
Total	1,835	2,183	2,968	2,251

(Source: The Commissioner's Office at Aden.)

APPENDIX "32(B)"

PARTICULARS OF IMPORTS OF SILK FABRICS INTO ADEN

	Quantity in Yards.		
	1956	1957	1958
United Kingdom	8,902	750	40
Hong Kong	29,665	11,715	1,829
China	369,909	99,795	—
Japan	774,607	1,648,114	122,208
Syria and Lebanon	35,162	8,501	—
Singapore	49,141	36,766	17,060
France	14,840	14,275	8,333
Indonesia	—	1,400	—
India	36,439	3,420	18,068
Malaya Federation	2,860	38,154	4,586
Germany (Western)	2,240	1,888	273
Italy	8,878	3,305	270
South Africa			
Switzerland	2,506		9,714
Saudi Arabia	400		
Netherlands	1,383		
Czechoslovakia	1,000		
Total	1,337,932	1,868,083	182,381

FABRICS OF SYNTHETIC FIBRES AND SPUN GLASS

	Quantity in Yards.		
	1956	1957	1958
United Kingdom	157,747	246,118	122,486
India	499,391	842,992	5,766,173
Italy	199,013	111,359	122,772
Hong Kong	53,884	50,593	63,003
Switzerland		23,271	7,949
Germany (Western)	44,351	146,050	250,103
Japan	16,422,074	24,104,387	21,621,668
Syria and Lebanon	1,511,715	971,530	2,006,910
France	159,942	208,709	173,247
Netherlands	29,476	47,972	12,311
Austria	6,038	849	34,361
China	46,337	70,297	
Israel			426
Singapore	510,543	88,952	200,478
Hungary	16,686	40,304	2,400
Malaya Federation	57,425	178,334	220,558
Kenya	400		
Indonesia	3,000	29,379	143,938
Czechoslovakia	3,440	1,000	
Egypt	1,000		
Eire	2,250	2,087	
Ceylon	2,432		
Bulgaria		25,650	
Total	19,727,144	27,189,833	30,748,783

(Source: The Commissioner's Office, Aden)

APPENDIX "33(A)"

INDIAN EXPORTS TO ADEN DURING THE YEAR 1958

RAYON					Value in Rs.
Rayon Sarees	..	..	..	..	95,987
Crepe	..	..	..	..	163,887
Half Crepe	..	..	..	..	25,121
Palace Crepe	..	..	..	..	7,864
Doria	..	..	..	..	40,718
Satin	..	..	..	..	322,068
Tafetta	..	..	..	..	131,342
Linen	..	..	..	..	90,631
Coating	..	..	..	..	29,213
Suiting	..	..	..	..	85,385
Panama Suiting	..	..	..	..	20,706
Sharkskin	..	..	..	..	31,225
Brocade	..	..	..	..	42,758
Chiffon	..	..	..	..	99,150
Ninon	..	..	..	..	97,177
Shirting	..	..	..	..	298,270
Poplin	..	..	..	..	7,277
Boski	..	..	..	..	55,458
Bush Shirting	..	..	..	..	89,413
Check	..	..	..	..	8,779
Velvet	..	..	..	..	3,965
Lining	..	..	..	..	12,164
Habutae	..	..	..	..	17,135
Organdi	..	..	..	..	868
Twill	..	..	..	..	2,484
Georgette	..	..	..	..	31,057
Leno	..	..	..	..	20,653
Parmatta	..	..	..	..	11,577
Lungi	..	..	..	..	49,686
Odhani	..	..	..	..	42,680
Subhaya	..	..	..	..	2,172
Umedi	..	..	..	..	9,375
Rayon Piecegoods (n.e.s.)	..	..	..	..	9,072,097
				Total	<u>11,018,342</u>

SPUN RAYON				Value in Rs.
Gaberdine	..	..	..	19,125
Panama	..	..	..	87,648
Suiting	..	..	..	3,138
Lungi	..	..	..	4,178
Subhaya	..	..	..	847
Spun Piecegoods (n.e.s.)	..	..	..	19,389
Umedi (Rayon & Cotton Mixed)	..	..	..	1,544
Lungi (Spun Rayon & Cotton Mixed)	..	..	..	2,505
Subhaya (Spun Rayon & Cotton Mixed)	..	..	..	3,281
Total				<u>141,655</u>
SYNTHETIC FIBRE FABRICS				
Nylon Sarees	..	..	..	8,620
Nylon Georgette	..	..	..	15,226
Nylon Shirting	..	..	..	7,470
Nylon Piecegoods (n.e.s.)	..	..	..	2,835,745
Total				<u>2,867,061</u>
RAYON MANUFACTURES				
Lace	..	..	..	6,509
Scarves	..	..	..	19,215
Handkerchieves	..	..	..	30,645
Caps	..	..	..	428
Socks	..	..	..	119,238
Hosiery	..	..	..	80,008
Garments	..	..	..	51,414
Shawls	..	..	..	63,236
Belts	..	..	..	1,789
Ladies' Handbag	..	..	..	2,229
Total				<u>374,711</u>
SPUN RAYON MANUFACTURES				
Hosiery	..	..	..	14,990
SYNTHETIC FIBRE (NYLON)				
Socks	..	..	..	35,701
Grand Total for Rayons				<u>1,44,52,460</u>

				Value in Rs.
SILK FABRICS				
Sarees	..	..	..	25,887
Piecegoods	..	..	..	12,563
			Total	38,450
SILK MANUFACTURES				
Scarves	..	..	..	7,541
Handkerchieves	..	..	..	1,821
			Total	9,362
			Grand Total for Silks	47,812

(Source :—The Silk & Rayon Textiles Export Promotion Council).

APPENDIX "33B"

INDIAN EXPORTS TO ADEN DURING 1959.

RAYON FABRICS				Value in Rs.
Saris	..	..	..	40,313
Crepe	..	..	..	31,434
Sheer	..	..	..	7,187
Satin	..	..	..	27,099
Taffeta	..	..	..	10,281
Chiffon	..	..	..	27,112
Georgette	..	..	..	104
Linen	..	..	..	7,010
Shirting	..	..	..	15,293
Suiting	..	..	..	9,200
Lungi	..	..	..	16,904
Umedi	..	..	..	10,123
Odhani	..	..	..	3,540
Subhaya	..	..	..	8,105
Rayon fabs. NES	..	..	..	27,45,878
Linen (SR)	..	..	..	49,295
Coating (SR)	..	..	..	47,567
Umedi (SR)	..	..	..	5,560
Rayon fabs. (SR)	..	..	..	32,732
			Total	30,94,737
NYLON FABRICS				
Saris	..	..	..	4,438
Georgette	..	..	..	11,180
Nylon fabs. (NES)	..	..	..	16,34,806
			Total	16,50,424
MANUFACTURES				
Lace	..	..	..	1,512
Socks (Nylon)	..	..	..	32,460
Hosiery	..	..	..	33,712
Hosiery (Spun)	..	..	..	85,500
Garments	..	..	..	5,078
Garments (Nylon)	..	..	..	7,210
Handkerchiefs	..	..	..	6,141
			Total	1,71,613
			Grand Total for Rayons	49,16,774

				Value in Rs.
SILK FABRICS				
Saris	..	..	..	3,862
Georgette Saris	..	..	..	87
Piecegoods	..	..	..	9,890
Piecegoods (CM)	..	..	..	2,673
			Total	<u>16,512</u>
MANUFACTURES				
Scarves	..	..	..	3,618
Stoles	..	..	..	198
Bedsheets	..	..	..	2,065
			Total	<u>5,881</u>
			Grand Total for Silks	<u><u>22,393</u></u>

(Source :—The Silk & Rayon Textiles Export Promotion Council).

APPENDIX "33C"

JAPANESE EXPORTS TO ADEN DURING 1959

RAYON					Value in U.S. \$.
Fujette	..	..	..	..	2,92,000
Palace	..	..	..	..	33,000
Satin	..	..	..	..	4,37,000
Sheoze	..	..	..	..	68,000
Taffeta	..	..	..	..	37,000
Georgette Crepe	..	..	..	..	2,000
Bemfany	..	..	..	..	7,000
Pique	..	..	..	..	2,000
Voile	..	..	..	..	35,000
Fancy Weave	..	..	..	..	15,000
Flat Crepe	..	..	..	..	17,000
Twill	..	..	..	..	3,000
Habutae	..	..	..	..	6,000
Sheer Crepe	..	..	..	..	1,000
Rayon fabs. N.E.S.	..	..	..	..	3,86,000
				Total	13,41,000

SPUN RAYON

Fancy Weave	..	..	..	..	40,000
Gingham	..	..	..	..	1,01,000
Muslin	..	..	..	..	9,29,000
Poplin	..	..	..	..	1,66,000
Serge	..	..	..	..	26,000
Shirting	..	..	..	..	1,02,000
Tropical	..	..	..	..	3,500
Suiting	..	..	..	..	1,06,000
S.R. Fabs. N.E.S.	..	..	..	..	1,29,000
Amunzem	..	..	..	..	1,500
Linnet	..	..	..	..	1,000
Gaberdine	..	..	..	..	400
				Total	16,05,400

SYNTHETIC FIBRE FABRICS				Value in U.S. Dollars
Nylon fabs.	..	..	..	3,84,000
Vinylidene fabs.	..	..	..	400
Synthetic fabs. N.E.S.	..	..	..	4,000
			Total	<u>3,88,400</u>
		Grand Total	..	<u>33,34,800</u>

(Source :—The Silk & Rayon Textiles Export Promotion Council).

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