

OFFICE OF THE HIGH COMMISSIONER FOR INDIA.

REPORT
on the work of the
INDIAN TRADE COMMISSIONER
during 1928-29 and 1929-30.

By
H. A. F. LINDSAY, Esq., C.I.E., C.B.E., I.C.S.

THE WORLD'S TRADE.

				£ million.		
				1927	1928	1929
United Kingdom	..	..		2,050	2,039	2,061
U.S.A.	..	..	..	1,862	1,895	1,981
Germany (A)	..	..		1,224	1,289	1,318
France	..	..	..	872	845	872
Canada	..	..	..	478	534	515
India ..	..	..	..	439	448	440
Japan	..	..	..	401	395	414
Italy ..	..	..	..	376	395	391
Netherlands	..	..	..	367	386	392
Belgium	..	..	..	319	360	386
Australia	..	..	..	302	276	268
Union of South Africa (B)	..			166	171	175

(A) Including the value of deliveries on account of Reparations.

(B) Includes exports of Bullion and Coin produced in the Union.

*From : The Deputy High Commissioner for India,
India House,
Aldwych,
London, W.C.2.*

*To : The Secretary to the Government of India,
Commerce Department,
Simla.*

1st October, 1930.

SIR,

I am directed to forward, for the information of the Government of India, a report prepared by the Trade Commissioner in London on his work during the two years ending March, 1930. The High Commissioner thinks that in view of the expansion that has taken place during the last few years in the staff and activities of the Trade Department of his Office, and of the growing interest in India in the development of the external trade of the country, a fuller report than on past occasions will be acceptable to the Government as well as to the public in India. In complying with the instructions of Sir Atul Chatterjee, Mr. Lindsay and his colleagues have compiled a report which the High Commissioner trusts will be found of great interest and value, inasmuch as it contains not only a clear exposition of the many-sided labours which the Trade Department in London performs on behalf of Indian commerce, but it also embodies Mr. Lindsay's own views, based on long experience both in Europe and in India, on certain modern tendencies which are likely to influence India's export trade.

2. Sir Atul Chatterjee does not deem it necessary to add to Mr. Lindsay's survey his own appraisal of the extent and causes of the prevailing economic depression. Suffice it to say that the malaise is world-wide, and probably affects India as seriously as any other part of the world. The High Commissioner is of the opinion that it is precisely in such times of difficulty and stress that an organisation such as his Trade Department has its chief value. When trade is buoyant and the flow of commerce unimpeded, the merchant has less need to seek official assistance ; but when markets are unresponsive, when old business falls away and new business is rarely to be found, a Trade Commissioner with an adequate staff and resources can do much to prevent undue retrogression by obtaining and imparting information, by investigating and smoothing out difficulties, and by jealously watching for and exposing harmful influences. Of this there are not a few examples in Mr. Lindsay's report.

3. Thus, as described in Chapter IV of the Report, the Department undertook a special investigation into the partial loss of the European market in Indian and Burma rice and followed it with a vigorous publicity campaign which, with the valuable assistance of the Empire Marketing Board, aroused interest not only in the United Kingdom but also in other

parts of the Empire. This campaign also has been extended with success to the Continent. Reference is made in the same chapter to the threatened stoppage of the import of Indian ginger into the United Kingdom, owing to certain necessary health regulations recently imposed in the United Kingdom, and it is explained how, with the assistance of the Imperial Institute, a solution to the difficulty has probably been found. Similarly in Chapter V, instances are given of negotiations which will facilitate the introduction of Kora silk to the United Kingdom market, and of the steps taken for the removal of a trade grievance of the exporters of Bombay oil cake. Attention may also be drawn to the observations contained in Chapter III regarding the manganese and mica trades. Sir Atul Chatterjee has no hesitation in endorsing the warning given by his Minerals Adviser, Mr. Tipper, to the Indian producer that if he wishes to meet growing competition from both without and within the Empire he must at all costs maintain, and if possible improve, his standards. This, in fact, is a warning which applies to all branches of the produce trade and one which cannot be over-emphasised, in view of the intense rivalry of producers the world over and the never-ceasing search for natural and synthetic substitutes.

4. The High Commissioner would also invite attention to the remarks in Chapter II on Indian Timber. The patient and useful work done by the Government of India's former agents, Messrs. Howard Brothers and Company, towards establishing Indian hardwoods on the British market, has of late been reinforced very successfully by the efforts of the High Commissioner's Timber Adviser, by the campaign of the Empire Marketing Board in favour of Empire woods, and by the excellent publicity afforded to Indian hardwoods by the beautiful panelling, flooring and furniture in India House. Sir Atul Chatterjee considers it most desirable that every effort should be made to satisfy the demand that has now been developed and he would advocate an enlargement of supplies, inasmuch as an export trade can only flourish if supplies are adequate and regular.

5. The Report bears ample testimony to the remarkable progress achieved in recent years by the Trade Commissioner and his staff in the sphere of publicity. When Sir Atul Chatterjee assumed office at the beginning of 1925 there was practically no Trade publicity organised by the Department. The successful representations made by the High Commissioner for the provision of a nucleus staff and financial resources have enabled the Trade Commissioner to organise the very effective and widespread publicity which is fully described in Chapters VI, VII and VIII of the Report. In the two years under review Indian stalls were organised in no less than 23 exhibitions and fairs, and materials for exhibition were sent to the organisers of 19 other fairs. Since many of these fairs last more than a week—at Newcastle the Indian stalls were displayed for four weeks—it is now possible to place both the raw materials and the manufactured products of India before the public in different parts of Europe throughout the year. The High Commissioner recognises that the funds at the disposal of the Trade Commissioner would not have enabled him

to expand his propaganda so widely had it not been for the generous co-operation and assistance of the Empire Marketing Board, to whom is due the most ample and grateful acknowledgment.

6. It is a matter of great personal satisfaction to Sir Atul Chatterjee that during his tenure of office in London he has been able to secure a considerable enlargement of the higher technical as well as of the subsidiary staff of the Trade Commissioner in London. The report itself is an example of the greatly enhanced value of the work done, as for the first time it includes chapters written by the chief officers of the Department on the branches of work in which they have specialised. Mr. Tireman has written on timber, Mr. Tipper on minerals, Mr. Gupta on agricultural products and Mr. Asli on publicity. Each officer has been in touch with the commercial and technical interests concerned, both direct and through the medium of committees and associations. Committee work takes time, but is of undoubted advantage, in that the officers concerned not only obtain valuable information for transmission to India, but by personal contact with leading personalities in the trade and commerce of Europe enhance their own efficiency as the guardians of Indian interests. Sir Atul Chatterjee is satisfied that the officers of his Trade Department are fully occupied, although there is much useful work remaining to be done, especially outside the United Kingdom. He is therefore very gratified that the Government of India and the Indian Legislature have seen fit to accept his proposals for the appointment on the Continent of Europe and in America of Trade Commissioners, who will work in close association with the Indian Trade Commissioner in London. The first new office is likely to be established in Hamburg before the close of the present year.

7. Mention has already been made of the publicity obtained for Indian timber by the opening of India House in London. This building, if only by reason of its more central position, is already attracting business visitors in larger numbers than when the High Commissioner's office was situated at a greater distance from the City. It also provides exceptional opportunities for publicity in the fine exhibition hall which already displays to great advantage some of the arts and crafts of India, and has been enriched by valuable gifts from Their Majesties the King Emperor and the Queen Empress. Sir Atul Chatterjee would take this opportunity of publicly expressing his most lively gratitude to the Governments and Princes of India and to the firms and individuals who have so generously presented or entrusted to his care the beautiful objects which adorn the hall. The branch of the Indian Railways Publicity Bureau located in another prominent part of India House also helps forward the propaganda for the development of India's external trade. The High Commissioner trusts that in the near future it will be possible to organise in India House a fully equipped Samples Room for displaying the staple agricultural and industrial products of India.

8. As this is the last occasion on which Sir Atul Chatterjee will forward to the Government of India the Indian Trade Commissioner's report, he

desires to express his warm appreciation of the great assistance rendered to his office and to him personally throughout his incumbency by the Departments and officers of His Majesty's Government in the United Kingdom, of the courtesy extended to him by representatives of the Dominions and of foreign Governments, and of the aid and advice tendered to him by many leaders of commerce and industry whom it would be invidious to particularise. He would also once more bring to the notice of the Government of India the invaluable services of Mr. Lindsay and his coadjutors. Under Mr. Lindsay's guidance the High Commissioner's Trade Department has expanded into an instrument of proved efficiency, and this is due largely to Mr. Lindsay's informed enthusiasm and wide experience. For nearly a year during the absence in India of Mr. Lindsay, the department was ^{successfully} ~~successfully~~ in the charge of Mr. A. M. Green, I.C.S., and Mr. S. N. Gupta, I.C.S., and both these officers, to the gratification of the High Commissioner, maintained its high standard. The Department has also been fortunate in the members of its higher technical staff. Sir Peter Clutterbuck and his successor Mr. Tireman have both been zealous and unsparing in their efforts to popularise Indian timbers. Mr. Tipper combines extensive knowledge of the mineral resources of India with sound business qualifications which are valuable assets to the Department. Mr. Gupta has rapidly familiarised himself with the main problems of India's external trade and his services on various committees have to the High Commissioner's knowledge been greatly appreciated by persons interested in Indian produce. Mr. Asli deserves warm commendation for the zeal, industry and efficiency with which he has developed the publicity aspects of the Department's activities. Sir Atul Chatterjee would also like to express his appreciation of the hard and devoted work of the office staff headed by Mr. Butler.

I have the honour to be,

Sir,

Your most obedient Servant,

A. M. GREEN,

Deputy High Commissioner for India.

CONTENTS.

	PAGE
INTRODUCTION	9
CHAPTER I.—Modern Trade Tendencies	11
CHAPTER II.—Markets for Indian Timbers	16
CHAPTER III.—Markets for Indian Minerals	21
CHAPTER IV.—Agricultural Products—Foodstuffs	26
CHAPTER V.—Agricultural Products—Industrial Materials	35
CHAPTER VI.—Trade Publicity—General Policy	46
CHAPTER VII.—Trade Publicity—Exhibitions and Fairs	51
CHAPTER VIII.—Trade Publicity—Exhibits and Enquiries	59
CHAPTER IX.—Committees and Conferences	66
CHAPTER X.—Staff and Location of Office—Acknowledgments	70
 APPENDIX A.—Highest and Lowest Prices of Indian Commodities 1927-28 to 1929-30	75
APPENDIX B.—Monthly Prices of Indian Commodities during 1929-30	76
APPENDIX C.—Officers of the Trade Department serving on Empire and Trade Committees	77
APPENDIX D.—Enquiries dealt with by the Higher Executive Officer	79
APPENDIX E.—Chart to illustrate the organisation of the Trade Department	80
APPENDIX F.—Functions allotted to officers and staff of the Trade Department	81
APPENDIX G.—Exhibition Hall—List of Donors and Exhibits	82

ILLUSTRATIONS.

EXHIBITION HALL :—

Main Hall	(to face) 9
Galleries	,, 20

INDIAN GOVERNMENT STAND :—

North East Coast Exhibition, 1929	,, 35
Canadian National Exhibition, Toronto, 1928	,, 46
British Industries Fair, 1929	,, 59
Leipzig International Fair, 1930	,, 74



EXHIBITION HALL, INDIA HOUSE ; VIEW OF MAIN HALL WITH THEIR MAJESTIES' GIFTS (Kashmir shawl and Howdah-cover) in the foreground.

REPORT ON THE WORK OF THE INDIAN TRADE COMMISSIONER DURING 1928-29 AND 1929-30.

Introduction.

This is the sixth report written by the Indian Trade Commissioner since the office was created in April, 1918 ; it relates to the two years 1st April, 1929 to 31st March, 1930.

Mr. E. Gordon, I.C.S., acted as Trade Commissioner from the 1st February to the 25th July, 1928, when I was absent on sick leave. In 1928 I was recalled to India to serve for eight months as Joint Secretary to the Government of India in the Department of Commerce. During my absence Mr. A. M. Green, I.C.S., acted as Trade Commissioner until his appointment as Secretary to the High Commissioner, when he handed over charge to Mr. S. N. Gupta, I.C.S., the Deputy Trade Commissioner, who continued in charge until my return to London on the 17th February, 1930.

My report for the years 1924-1925 and 1925-1926 described at some length the work of the Trade Commissioner's Office under the three main heads of :—

Commercial Intelligence,
Commercial Committees, and
Commercial Publicity.

The first of these heads was divided into the two sub-heads into which commercial intelligence naturally falls, namely,

Trade Introductions and
Trade Intelligence

and numerous examples were given of the different classes of trade enquiries received and of the methods adopted in dealing with them. For the purpose of the present Report it is sufficient to repeat, in summary form, that the primary function of the Indian Trade Commissioner is to render all possible assistance to firms or individuals in India who are interested in the sale of Indian goods in Europe and America. As a corollary assistance is also given to firms and individuals in those areas who are importers of goods which India supplies and who are anxious, or can be encouraged, to develop their trade with India. The assistance given to private firms under these two heads accounts for the greater part of the work of my office. They are complementary to each other, not merely in the sense that the former represents the requirements of the Indian exporter seeking foreign markets while the latter represents the foreign importer seeking Indian goods ; but also in the further sense that each supplies the connection which the other seeks. This side of the activities of a Trade Commissioner's Office is much like that of a merchant or

broker who correlates known supplies to known demands, and *vice versa*. The success of the work depends on the extent and reliability of the information on record.

This information is available to answer not only private trade enquiries but also those emanating from departments and officers of the Government of India and of Provincial Governments and Administrations in India, or from Indian States. Examples of the different classes of enquiry falling under this category will be found in the chapters on Timbers and on Agricultural Products.

I have explained in previous reports and take this opportunity to repeat, that my office is not interested in the import trade of India, which is the concern of British and foreign trade commissioners and consular officers, and of the States which employ them. At the same time we are prepared to assist Indian merchants who encounter difficulties in their dealings with foreign merchants, whether in import or export lines of trade. We have been able thus to settle disputes in which Indian firms were at a disadvantage either through their remoteness and lack of close personal contact with western firms or through misunderstandings having arisen on either side. I am also prepared to furnish information regarding machinery or processes to business men or Government Departments in India desiring such assistance to further the agricultural or industrial development of the country.

In my last report for the years 1926-1927 and 1927-1928, I gave an account in three separate chapters of India's trade with the Continent, with the United Kingdom and with North America. This year I propose to vary the method of treatment. After the usual chapter on Modern Trade Tendencies, separate chapters will describe the activities of the office classified according to the main groups of commodities with which we are called upon to deal. One chapter will be devoted to the timber trade, one to minerals, and two to agricultural products. Enquiries for manufactured goods are described in the Publicity Chapter. These chapters have been written by different members of the High Commissioner's staff who have special knowledge of these different trade groups. They will explain in detail the actual work carried out by my office during the past two years to serve the trade interests of India in the various directions in which such service is open to us, namely, by the collection and dissemination of information by trade introductions, by co-operation with technical committees, by participation in exhibitions and fairs, by lectures and by such other publicity methods as may be open to us. A general chapter summarising our work on commercial committees and the usual chapter on staff and location of office will close the report.

Chapter I.—Modern Trade Tendencies.

A.—Price Fluctuations.

The wide fluctuations in the prices of staple goods in the world's markets, noticed in my last report, are still much in evidence and are no less a feature of the trade in Indian goods than of imports from other sources. A statement has been prepared and is annexed to this report (Appendix A) showing for a wide range of India's exports, the highest and lowest prices obtained in the United Kingdom during each of the past three years. It will be noticed, firstly, that oilseeds and oilseed products seem generally to have fluctuated more seriously in price during 1928-29 and 1929-30 than during 1927-28. Secondly, in regard to other staple goods, fluctuations in 1928-29 were generally less than in 1927-28, but there was a relapse in 1929-30. Thirdly, the general tendency of all prices during all three years is downwards. Fourthly, the fall of prices in 1929-30 was more severe than during the preceding year.

The fall of prices in 1929-30 was so marked and contains so many features of general interest that it merits special attention. There were minor and normal fluctuations during the first half of the year, that is to say, between April and September, 1929. Indeed, had our survey stopped at September, it might with truth have been said that the world's markets were generally steadier in 1929 than in either of the preceding years and that a return to greater stability and more normal trade conditions was in evidence. From September 1929, however, and still more markedly from the succeeding month of October, a decline set in which affected many classes of raw materials in all markets. A statement illustrating the course of London prices for staple Indian goods monthly during 1929-30 is annexed (Appendix B).

The causes of the slump are obscure. The explanation most commonly given is that over-production had occurred and that prices sagged in consequence until they reached levels discouraging to producers and encouraging to consumers. This explanation is not wholly satisfactory, for it does not account for the simultaneous slump in markets so widely different as those of rice, jute, cotton, tea, oilseeds and shellac. Moreover, minerals such as copper and tin appear to have participated. The Wall Street crash is frequently cited in connection with the slump; but the crash occurred in late October and aggravated, rather than originated, the decline. It might be more correct to speak of a general falling-off in purchasing-power following industrial depression and unemployment. Some writers claim that the gold standard, which has now been so widely re-established in both hemispheres, is not operating to its full extent owing to the action of some countries, such as France and the United States, in "sterilising" their gold reserves. In pre-war days the export of gold, to remedy an unfavourable trade balance, had a double effect. It reduced internal prices and at the same time tended to raise prices in foreign countries, thus encouraging exports, discouraging imports and

restoring equilibrium. Nowadays gold movements do not have so marked an effect. Internal prices are affected by many factors independent of, or only partially dependent on, gold reserves; for example by labour conditions, taxation and the bank rate. Foreign trade is still of course dependent on the relation between internal and external prices, but the international adjustment of prices is hampered by the high levels to which protective tariffs have been raised. Nor, if gold reserves are insufficient and jealously guarded, can it fairly be said that in consequence bank rates are high and credits difficult to obtain. The reverse is actually the case.

B.—Maladjustments of Demands and Supplies.

The real cause of the slump appears to be a lack of co-ordination between producing and consuming markets, and particularly between the agricultural industry and the other great industries which consume agricultural products. The agriculturist has, it is true, one factor of no little importance in his favour, that each season he has a choice of crops to sow, and that he is thus enabled to transfer his efforts from an unprofitable to a profitable crop. But this choice of crops is limited by characteristics of soil and climate. Moreover, having selected his crop, his expectation of a profit is usually dependent on his ability to produce the maximum of which his land is economically capable. Restriction of output is practically impossible. His best chance of success lies in a heavy yield during a season when the average production is poor, and his losses occur when his own output is poor while that of his competitors is heavy.

Control of output is possible in the case of plantation products such as tea, coffee or rubber, or in the mineral or timber industries. It is widely practised by manufacturers and is indeed to some extent forced upon manufacturers by the difficulty of adapting plant to the production of different types of goods. We have thus reached a position in which—neglecting for the moment plantation products and minerals—the manufacturer is capable of controlling his output while the agriculturist cannot control his, or can only control it within narrow limits. But the control of manufactures involves, in times of depression, a reduction of output and therefore a reduction in the demand for raw materials, including those which the agriculturist supplies. Moreover to the extent to which it involves the dismissal of staff, it involves also a reduction of employment and therefore of purchasing-power; and this reduction must affect the demand for agricultural as well as manufactured products. Science itself seems for the time being to be as much a hindrance as a help. New processes result in increased production at lower cost, but lower costs too often involve increasing resort to mechanical and less use of manual agency and again unemployment. Finally the control of output often means that inefficient factories are kept going; and while this tendency has its advantage in maintaining employment it has its drawbacks in keeping prices at artificially high levels at periods when the full-time operation of the more efficient factories might result in lower prices and increased demands.

C.—Rationalisation.

In these circumstances the panacea generally recommended is "rationalisation" or the application to industry and trade of lessons drawn from the natural and economic sciences. The actual form which rationalisation takes must naturally vary with the particular requirements of each industry or trade, and indeed of each business concern. Big enterprises such as those connected with rayon, tobacco, soap or margarine, extend their rationalising influence backwards towards the production of their raw materials and forwards towards their principal markets. Just as the building contractor will arrange for the supply of his building materials in such a way that neither more nor less quantities reach the site daily than are necessary to meet his daily requirements, so also the manufacturer arranges beforehand for constant supplies of his raw materials adjusted to the needs of his factory; and the factory itself produces neither more nor less than can be promptly sold.

The need for organisation is everywhere felt, for the avoidance of unnecessary stocks, for the reduction of waste, for the most economic methods of production and distribution and the most efficient salesmanship. India, no less than other countries, is adapting herself to the new regime. I had occasion, in my last report, to draw attention to wasteful methods employed in the preparation of Indian ground-nuts for western markets, resulting in the setting up of free fatty acids and consequently in lower prices for an inferior article. I have since obtained evidence that better methods are now employed and that Indian ground-nuts have a better reputation and are securing better prices than would have been the case had the old methods of preparation continued unchanged. Although much still remains to be done, the improved agricultural methods recommended by the Royal Commission on Agriculture have already borne fruit in some directions and will undoubtedly bear more fruit under the guidance and control of the Imperial Council of Agricultural Research.

D.—Conclusions.

Before concluding this chapter, I venture to draw attention to one or two modern tendencies which are likely to influence India's export trade. In the first place there is a tendency towards the formation of big purchasing units in foreign countries. As examples of such units may be quoted the tobacco and margarine trusts of the United Kingdom and the Co-operative Wholesale Societies of England and Scotland. Other instances might be quoted from the Continent, where the system of "International industrial ententes" has been carried to great lengths, covering the purchase of raw materials as well as the sale of manufactured goods. There is an obvious danger that large purchasing units may attempt to squeeze the small and unorganised producer of the raw materials required. On the other hand certain advantages are obvious. The big concern must have its raw materials and must be able to count on constant supplies. The producer of the raw materials has almost invariably an alternative crop on which to fall back, or else (as in the case of

Indian copra and coconut oil) a local market in which to sell if the foreign markets are unprofitable. The price offered must, therefore, in the interests of both parties, be one which will encourage production in competition with alternative crops and in excess of the needs of local markets. The general position requires careful watching, but the evidence so far received leads to the conclusion that economic prices are at present offered and that the operations of the big purchasing unit have on the whole a steadying effect on prices. It is further possible that such units may adopt the method of pecuniary advances to growers and thus lead to the development of agricultural credit systems where such systems are most needed.

A second development, which also requires watching, is the spread which is allowed to occur in European markets between wholesale and retail prices of the same commodity. The French Government early in 1930 ordered an enquiry to be held into this tendency in France. The comments of the British Food Council on the retail prices of tea, milk and bread in the United Kingdom will also be remembered by those who have studied the reports of that Council and the correspondence which has passed between it and various retail organisations, as published in the press. There is evidence that the price charged by the British grocer, for example, in retailing tea, is unaffected by reductions in the wholesale price of tea. The defence given varies according to circumstances—in some quarters it is stated that the grocer makes no profit or even makes a loss, in retailing sugar, the price of which is now at a phenomenally low level, and that he must look to other products such as tea for the means to cover his loss on sugar. In other quarters it is pointed out that if retail prices are to follow wholesale prices downwards they must also follow them upwards; that retail purchasers dislike fluctuations and that retail prices are generally so calculated that gains made during a period of depression when wholesale prices are low offset the contraction of profits which occurs when wholesale prices rise. After making full allowance for these arguments it must be recognised that advertising has increased considerably of recent years in Europe and America. While advertising is not of itself an unhealthy sign, it is an expensive practice, the costs of which are normally met from profits. Advertising can and is extensively used as a means of stimulating the popular demand for an article as an alternative to reductions of price and is maintained out of the profits derived from high prices. From the point of view of India and other countries producing wholesale goods in popular retail demand in Europe and America, it is desirable that the public should get all possible advantage from any fall of wholesale prices, for by this means and by this means alone can the demand for such goods be ultimately stabilised on wide and sound levels. Retail demands at high prices, bolstered up by extensive advertising, do not provide the same guarantee of sound future business as is provided by reductions of price and the wider consumption which normally follows. This would appear to be the long view to take, and it is one which, it is hoped, will commend itself to the Consumers' Council recently organised by the British Government.

Thirdly, a wide disparity exists in many markets between the prices offered for superior and inferior grades of the same commodity and this disparity may also apply to different articles competing with each other as alternative raw materials for the same industry. In some cases it is India which produces the superior grade. For example, in the London market for linseed at the time of writing, Calcutta linseed commands £16 per ton while Argentine is quoted at £14 10s. In other cases it is the Indian product which secures the lower prices; for example, fine m.g. Broach Cotton at Liverpool is valued at 4.55 pence while the price of middling American is 6.30 pence. In yet other cases, such as tea, India produces both fine and inferior qualities, and wide differences may be noticed between the prices secured by average Darjeeling and average Cachar grades at the same auction sales in London. The differences of quality represented by these price margins may be due to climatic and other causes beyond human control. Occasionally, however, the lower price level is due to carelessness in preparation for the market. In this category may be placed commodities such as hemp, which often arrives on the London market from India in a dusty condition; cotton which is sold mixed and therefore of irregular staple, and sometimes also "neppy" as a result of careless ginning; wheat and oilseeds containing foreign grains or dust; hides and skins carelessly flayed; shellac containing dirt and sand. Other examples might be quoted but these will suffice. The point is that high quality goods nearly always command a premium which would more than compensate for the additional cost of careful preparation. Where India loses ground is not through any deterioration of her existing standards but through failure to improve them as rapidly and as consistently as her rivals are improving theirs.

Fourthly and lastly, while standardisation is so much the order of the day, there are some lines of trade in which standardisation may defeat its own objects. In artware, for example, cheapness may be an important consideration. But it cannot be the only criterion, for human nature still calls for distinctive types and colours. During the past few years considerable progress has been made by Indian manufacturers of brassware and lacquerware in the production of new styles and patterns to attract British and Continental buyers; and Indian carpets are also making progress in western markets. These movements are all to the good. A certain degree of standardisation is desirable up to the point at which costs are reduced and workmanship is improved. But what is still more important is that designs should be periodically changed to meet changes of taste and fashion; and this lesson is being taken to heart by Indian craftsmen to the expansion of their trade and, doubtless, of their individual profits.

*Chapter II.—Markets for Indian Timbers.

General.

Deliveries of timber to Europe and the United States of America, in 1928-29 and 1929-30, the sales of which have been arranged by the Timber Adviser amount to 2,362 and 1,906 tons respectively. Deducting agents' commission and freight, the approximate value of the timber f.o.b. Andamans is £16,000 in 1928-29 and £13,000 in 1929-30.

The following statement shows the quantities of each species delivered in the United Kingdom, on the Continent and in the United States.

UNITED KINGDOM.				1928-29. Tons.	1929-30. Tons.
Sawn Timber :—					
Silvergrey	..	..	..	183	84
Pyinma	..	..	..	64	—
White Chuglam	..	..	..	311	234
White Bombwe	..	..	..	61	—
White Mahogany	..	..	..	692	97
Black Chuglam	..	..	..	13	—
Gurjan	..	..	..	1,021	525
Koko	..	..	..	17	—
Papita (Indian Balsa)	..	..	..	—	29
Choi	..	..	..	—	5
Logs :—					
White Chuglam	..	..	..	—	679
White Mahogany	..	..	..	—	38
Gurjan	..	..	..	—	94
Total				2,362	1,785
GERMANY.					
Padauk squares	..	..	..	—	67
UNITED STATES.					
Sawn Timber :—					
Koko	..	..	..	—	51
White Chuglam	..	..	..	—	3
Grand Total				2,362	1,906

The demand for Indian timbers is in excess of the supply and had supplies been available it would have been possible to sell appreciably larger quantities. During the past year enquiries were received for some 1,200 tons of timber over and above the quantity sold, but owing to lack of supplies it was necessary to inform the enquirers that no timber was available. Negative replies to such enquiries tend of course to dis-

* Chapter written by Mr. H. S. Tireman, C.I.E., Timber Adviser to the High Commissioner.

courage their repetition and it is impossible for this reason to make any estimate of the quantities which could be sold were ample and regular supplies forthcoming, or to gauge the trend of the market. It would appear that in the existing depressed state of trade in general there is a tendency for buyers of tropical hardwoods to sacrifice quality to price, and as long as the difference in appearance is not marked, to prefer, for instance, Philippine timbers to the slightly more expensive woods from the Andamans.

The Marketing Committee of the Empire Marketing Board is at present considering schemes for the development of trade in Empire timbers in collaboration with the Imperial Institute Advisory Committee; and from discussions which have taken place it is understood that, with adequate and regular supplies, and an efficient system of marketing, the demand for Indian decorative woods should be capable of very considerable expansion. It is, however, essential that supplies should be regular, and that the greatest care should be taken to ship only timber of the best quality. In this connection it is of interest to note that the quality of recent shipments has considerably improved, and during the past twelve months there has been little to complain of. The recently sanctioned scheme for the introduction of mechanical methods of timber extraction in the Andamans should lead to a considerable increase in the quantities available for export.

Attention is invited to the enquiry mentioned in the next succeeding section of this Chapter regarding a substitute for Pitch Pine. This is the first enquiry received for any Indian timber to be used as a substitute for "a soft wood." There appears to be little doubt that a world shortage of softwoods is only a matter of time, and that it will result in an increase of price. There are several timbers in India, Burma and the Andamans which for want of a better name have been called "soft hardwoods" and which in all probability would prove satisfactory substitutes for the coniferous timbers known to the trade as "softwoods." Owing to the cost of extraction and the absence of seasoning kilns the export of these timbers is not a feasible proposition to-day, but with the introduction of seasoning plant and more modern methods of handling timber it may at some future date be possible to place them on the European markets at prices which will permit of competition with the American and European softwoods proper.

Commercial Enquiries.

Apart from definite enquiries for the purchase of timber, the property of the Government of India or of Provincial Governments in India, trade enquiries have been received for information regarding the following :—

Gurjan	..	..	..	..	..	..	8 enquiries.
Silver Grey	..	..	..	..	..	..	4 "
Pyinkado	..	..	..	..	..	..	1 "
Pyinma	..	..	..	..	..	..	3 "
Black Chuglam	..	..	..	..	..	..	1 "
Haldu	..	..	..	..	..	..	1 "
Koko	..	..	..	..	..	..	1 "

In addition, thirty-three more or less general enquiries were received as noted below :—

Regarding Indian substitutes for other timbers now in use	3
For Indian timbers suitable for decorative or cabinet work	2
For Indian timbers suitable for fishing rods	1
For Indian timbers suitable for oars for the Navy ..	1
As to the best means of getting into touch with dealers in Europe or India	7
Regarding the best means of popularising the use of creosote in India	1
For statistics	4
For samples or specimens	6
Regarding the possibility of obtaining Indian resin ..	1
For general information on various subjects	7

Possibly the most interesting of these enquiries was one received from the Wood Mosaic Company of Louisville, Kentucky, who have asked for information regarding Gurjan for flooring. The three enquiries for Indian timbers to be used as substitutes for non-Empire timbers related firstly to pitchpine for furniture, secondly to a timber suitable for tool handles, and thirdly to timbers suitable for sleepers on the Palestine Railways. In the first case samples have been supplied by the Andamans. The firm in question uses some 3,000 tons of pitchpine per annum, and if a suitable timber can be supplied at a competitive price there is a prospect of considerable trade in this direction.

Relations with the Government of India and Local Governments.

By far the greater part of the Timber Adviser's work is connected with timber from the Andamans. On receipt of enquiries he cables the Chief Forest Officer, asking for a quotation and a shipping date, and if the enquirer accepts he makes a contract with him. The purchase price is recovered by Messrs. Martin & Company, who also arrange freight. If the timber is required at an early date it is usually shipped from the Andamans to Calcutta in one of the chartered steamers and transhipped there, but when it is possible to delay shipment until some 700 or 800 tons are ready arrangements are made for a steamer to call at the Andamans and to carry the timber direct to London. Three shipments were made in this manner during the period under report and another has been recently arranged.

As regards Local Governments the Timber Adviser maintains close touch with the London Agents through whom the Madras Government conduct their European sales. A sale of a consignment of Laurel logs was effected on behalf of the Bombay Government. Towards the end of the period under report an enquiry was received from Burma regarding the possibility of selling 100 tons of Burma Mahogany, and the Timber

Adviser has placed this in the hands of a broker. The following enquiries were referred to Local Governments :—

- (a) Regarding a substitute for pitch pine. Referred to Madras with the suggestion that samples of Poon, Karani, Pali and Kindal should be sent to the enquirer provided that a competitive price could be quoted.
- (b) Regarding timber suitable for sleepers for the Palestine Railways. Referred to Bombay, Madras and Bengal. Suitable timbers suggested were Sal, Laurel and Kindal.
- (c) Regarding Axlewood and Dhaman for tool handles. Referred to Madras and Bombay.
- (d) Regarding a Bamboo suitable for umbrella sticks. Referred to Burma.

The Forest Department of the Kashmir State asked to be put in touch with leading gunmakers with a view to the sale of walnut gun stocks and the desired introduction was made.

At the instance of the Empire Marketing Board, a reference has been made to all Provincial Forest Departments for information which it is proposed to include in the Handbook of Empire Timbers which the Board is preparing; and they have also been asked to supply specimens of certain timbers in connection with an investigation into Empire Hardwoods from the point of view of turnery.

Publicity.

An Exhibition of Empire Timbers was held at the Imperial Institute from February to April, 1928, when the following Indian timbers were shown :—

Plank and board form :—Teak, Andaman and Burma Padkua, Gurjan, Haldu, Laurel, Pyinkado, White Bombwe, Pyinma, Eng, Thitka (Burma Mahogany), Silver Greywood, White Chuglam, White Mahogany, Koko, Burma Tulipwood, Rosewood, Gumhar and Toon. The exhibits of finished articles made of Indian timbers were :—

1. A billiard table, cue stand, marking board, &c., in Indian White Mahogany.
2. A pianoforte in Rosewood.
3. A pavilion built of various Empire timbers of which White Chuglam was one.
4. An automatic gramophone in Laurelwood.
5. A portable ditto in Teak.
6. Doors for public baths in Teak.
7. Single and folding doors in Andaman Padauk, Silver Greywood, White Chuglam, Laurelwood, White Mahogany, White Bombwe and Koko.
8. An office desk on pedestals in Silver Greywood, Pyinma, and Indian Marblewood.
9. Sections of panelled framing and frieze in Burma Mahogany.

10. Flooring in Gurjan and other timbers.
11. Panel stand with 28 double-sided panels in various timbers.
12. Double-sided screens in Teak, Laurel, Rosewood and Pyinma.
13. Sideboard in Laurel.
14. Player piano in Laurel.
15. Divan in various timbers.
16. Mirror frames in various timbers.
17. Chair in Koko.
18. Overmantel in Teak.
19. Clock cases in Koko and Gurjan.
20. Flooring strips in Teak.
21. Furniture in Satinwood, Teak, Laurel, and Toon (for linings).
22. Saloon motor car in Teak.
23. Panels (polished veneers) in Rosewood.

The planks and boards referred to are now on permanent exhibit in the Indian Gallery. This Gallery also contains five dioramas, the wood-work of which has been done in Teak, Pyinma, White Chuglam, Koko, and Lal Chini. The subject of the teak diorama, which was presented by Messrs. Steel Bros., is a Burma teak forest showing elephants dragging logs and launching them in a river; this has been executed in an extremely realistic manner.

The opening of India House has provided an opportunity for those interested to study the extremely beautiful work done in Indian timbers in the decoration of the various rooms, and should prove a useful means of publicity. The Timber Adviser has already shown the timbers to a considerable number of interested persons. Hand specimens of the timbers most likely to be in demand are given to any callers who may be interested.

As an example of co-operation with the Press, an article on the "Forests and Timbers of India" was contributed by the Timber Adviser to the recent Special Number of "The Times" on India.

Committees.

The Timber Adviser is a member of the following Technical Committees of Forestry and Forestry Products:—

- (1) The British Engineering Standards Association. He represents the Governing Council of the Empire Forestry Commission on the Special Sub-Committee dealing with Plywood.
 - (2) Empire Forestry Association. He represents the High Commissioner on the Governing Council.
 - (3) Imperial Institute Advisory Committee on Timbers, on the nomination of the High Commissioner for India.
 - (4) Imperial Institute Advisory Committee on Tanning Materials, on the nomination of the High Commissioner for India.
-



EXHIBITION HALL, INDIA HOUSE; VIEW OF GALLERY
taken from Aldwych windows.

*Chapter III.—Markets for Indian Minerals.

General.

During the period under review, there has been over-production of almost all minerals, leading to increased competition. Prices have been steadily decreasing, and it does not appear that the bottom has yet been reached. Attempts at rationalization so-called (really restriction of output) are continually being made, the outstanding case being that of the Tin Producer's Association. This Association has spread its net very wide, and there seems a reasonable hope of its achieving its object. Attempts to form a similar association amongst the Manganese producers have, so far, failed, because the Russian authorities will not fall into line. It stands to reason that any project of this kind can only be successful if it includes all producers.

Manganese provides an outstanding example of over-production. After the relinquishment of the Harriman concession, the U.S.S.R. undertook mining operations in Georgia and Nikopol, with the avowed intention of recovering the position which Russian Manganese held before the war, and to do so they were prepared to undersell all other producers. As the manganese production had re-adjusted itself to a comparatively low Russian output, it is obvious that a large increase in output from Russia would have an unsettling effect. In addition, there has been an increased output from the West African deposits and the deposits at Postmasberg in the Union of South Africa have been boomed. If the latter deposits are capable of fulfilling their promises, competition will be still further intensified. The result of over-production has been a drop in the price of manganese to a point lower than it has been for several years, the fall being particularly marked during the latter half of 1929. The fall in price has seriously affected all grades of Indian Manganese except that used for ferro-manganese. There are no signs that the intensive competition will not continue. It is of interest to note here that the West African deposits are behaving in the same way as the Indian, the phosphoric content increasing as depth increases.

Russian competition has particularly affected the second grade Indian ores, and has been especially noticeable in the trade to European Continental countries. A measure of relief has been given by a reduction of railway freights to Bombay and Calcutta; port charges have also been reduced. With the present decrease in ocean freights, Indian Manganese is the better able to make a fight.

Mica.—The introduction into the Bihar and Orissa Legislative Council of a Bill to minimise the losses from theft in mica mining (the Mica Bill) created widespread interest in this country and in the United States of America. The Bill was commented on by several technical papers, while the electrical industries expressed keen interest in its fate; the Bill being looked upon as a courageous attempt to deal with

* Chapter written by Mr. G. H. Tipper, Minerals Adviser to the High Commissioner for India.

a particularly difficult subject. It was felt that the Bill would go far towards stabilising the industry by ensuring to the legitimate miner a fair return for his efforts, and eliminating the sense of insecurity brought about by the sale of a considerable volume of stolen mica. The Bill has now been passed, and it remains to be seen how far its provisions will be effective in preventing theft.

For electrical purposes, no efficient substitute for mica has yet been found, and the mineral continues to be in constant demand, which is greater than the supply. Although India is still the largest producer of sheet mica (using this term to include block mica and splittings) the output from South Africa and Rhodesia is continually increasing, and is now little short of the amount produced in India. It is probable that in the course of a few years the African will overtake the Indian output in quantity. The Indian trade (70 per cent.) is now largely in the form of splittings, and in this India is pre-eminent. In fact, block mica is imported into India to be made into splittings. It cannot be too strongly emphasized that there is no secret in the preparation of splittings. It is merely a question of manual dexterity, and it can only be a matter of time before competitors appear. It is essential for the Indian producer to be particularly careful to maintain a high standard in order that he may keep his established market, and this applies also to the preparation (trimming, sizing and grading) of block mica, about which complaints are by no means infrequent.

There is a steadily increasing demand for mica powders of different grades. Unfortunately, in spite of the large tonnage of waste mica available in India, no wholehearted effort has been made to produce this material. Samples received from India have been favourably reported on but the producers have not been able or willing to continue. Attempts are now being made to put the production of the material on a sound footing.

Chromite.—The better grades of Mysore Chromite seem to be particularly suitable for refractory purposes, and enquiries on this account have been frequent.

Indian Pig Iron.—The imports into the United Kingdom have shown signs of increasing. The trade to the Continent remains steady. Japan is still the outstanding customer, while the imports into the United States of America amount to a considerable tonnage.

Ochres.—Ochres of good quality, red and yellow, are constantly being asked for and if carefully selected are sure of a market.

Abrasive Garnet, Steatite, and Semi-precious stones are also in demand.

Commercial Enquiries.

The enquiries addressed to the Minerals Adviser vary greatly in character, covering a wide field, and are not always confined to strictly mineral matters. Questions have been asked on labour conditions and wages in India, the probable effect of the Mica Bill on prices, tariffs,

chemical industries, the names of reliable analysts in India and other miscellaneous subjects.

Of strictly mineral enquiries some are of the simplest character. A well-known shipping company asked if Ilmenite was a mineral. The rumour of a new and extended use of a mineral may be the cause of a sudden run of requests. This happened on the reported use of powdered steatite on a large scale in ceramics. In this case the rumour was baseless, but the time expended in supplying information cannot be regarded as wasted, as the names of producers in India were broadcast and there are grounds for believing that business resulted.

Analysing the enquiries, the minerals most frequently asked about were Mica and Manganese. Some of the points concerning these minerals have already been touched upon. Apart from these, information on practically all aspects of these minerals has been supplied, from trade statistics to mode of occurrence and preparation for the market. An interesting and extensive correspondence has been carried on with an inventor in Holland, who claims to have devised a new use for waste scrap mica. His results have not yet been made public.

The use of Ilmenite sand which accompanies Monazite on the coasts of Travancore has greatly increased, for the making of titanium pigments, and enquiries on this account have been frequent.

The aluminous refractories, Sillimanite and Kyanite, continue to excite interest. Requests for information on the occurrence of these minerals have been made by manufacturers of refractories both in this country and in the United States of America. Sillimanite has also a limited use as an abrasive.

Several enquiries have been received for Ochres of good quality, both red and yellow, and there is no doubt that there is a ready market for them in the country. Trade is unlikely to ensue unless the Indian producer takes greater care in selecting his material, which is often not of the same quality as his samples. An excellent consignment of Asbestos from India has been received in London. Its valuation was at least equal to the best Canadian. Asbestos of this quality is rare in India, and its exact source has not yet been traced. It is to be hoped that this is only the first of many such shipments.

Information on the occurrence and literature dealing with Indian Coals has been sent to the Institute of Fuel. Analyses of Bihar and Assam coals have been supplied to enquirers. Coal statistics have also been in request.

In addition the following minerals have been the subject of enquiry :—

Garnets (abrasive and semi-precious), bauxite, monazite, tin and wolfram, felspar, zinc ores, lead ores, magnesite, saltpetre, magnesium chloride, phosphates and sulphuric acid.

It is not possible to give a complete analytical list of the work done by the Minerals Adviser. The following will, however, give some idea of the ground covered. It must be pointed out that some of the queries entail considerable correspondence. Where convenient, a personal interview is arranged.

Enquiries from the United Kingdom, United States of America, and the Continent, for exporters of Indian minerals	22
Enquiries <i>re</i> occurrence, extent and reserves of minerals in India	13
Enquiries for statistics	10
Enquiries from India for names of importing merchants abroad	6
Samples received from India for trade valuation ..	4
Enquiries <i>re</i> chemicals in India	4
Enquiries <i>re</i> analyses of Indian minerals	6

and others of a miscellaneous character.

In connection with a request from the Railway Board, a survey of the trade in manganese ore with special reference to Russian competition was undertaken and reports submitted.

Publicity.

Efficient publicity, so that the possible user of Indian minerals may be reached, is not easy of achievement. It is a comparatively simple matter to make a pleasing display of good mineral specimens by which the general public may be attracted. More than this is necessary for the possible consumer. The information required is usually of a detailed character, and hence it is doubtful whether mere displays unaccompanied by geological map, analyses, &c., do really fulfil the purpose for which they are intended. There is, at present, one permanent display of Indian minerals in the Exhibition Galleries of the Imperial Institute, but it cannot be said to be either representative or very attractive. Efforts are being made to improve this collection on both sides and it should be more useful in consequence. It is hoped also to provide a good collection of Indian minerals for exhibition at India House, where a Commercial Samples Room is to be organised. Small collections of minerals have been shown at some of the trade fairs and exhibitions. A small permanent travelling collection is now under construction, while special exhibits will be used where conditions are suitable.

No articles were written for the Press on Indian Minerals. Interviews were, however, given and statistical information supplied.

An illustrated lecture on Recent Developments in Indian Minerals was given before the Royal Society of Arts on February 7th, 1930, by the Minerals Adviser. Judging by the attendance, the discussion and the requests for copies, it may be considered to have been successful. The trade and technical papers gave it a fair amount of publicity.

Committees.

In 1925, the Imperial Mineral Resources Bureau was amalgamated with the Imperial Institute, and the work previously done by the Bureau is now carried on by the Mineral Resources Department of the Institute. There is an Advisory Council on minerals, and numerous technical

committees. Until the appointment of a Minerals Adviser, the High Commissioner was unrepresented either on this Advisory Council, or on the technical committees of the Mineral Resources Department. On the appointment of a Minerals Adviser, the High Commissioner felt that representation was essential. In February, 1929, the Indian Trade Commissioner was, therefore, nominated to represent the High Commissioner on the Advisory Council (with the Minerals Adviser as his Deputy), while the Minerals Adviser became a member of all the technical committees, with the exception of the Legal, Abstracts, Publications, and Libraries Committees. The Minerals Adviser has, consequently, attended all the meetings but one of the Advisory Council, and meetings of the Tin and Tungsten, Refractories and Copper Committees.

The Advisory Council meets about nine times a year. The technical committees meet at infrequent intervals when there are special problems to be dealt with. The benefits which accrue to the Minerals Adviser from attendance at meetings of these bodies consist chiefly of the opportunities thus afforded to him of representing the interests of the mineral industries of India; of discussing the mineral problems of other parts of the Empire; of studying statements relating to Empire mineral resources made by experts who are visiting this country; and, in general, of personal contact with the members of the Council and Committees.

The Imperial Institute.

The Imperial Institute deals with a considerable number of enquiries relating to Indian minerals. The Institute, with its staff and records going back many years, is quite capable of answering such enquiries. None of its staff has, however, been in India, and hence it is not capable of giving personal information on Indian minerals and Indian conditions, matters of often considerable importance to enquirers. Nor, naturally, can the Institute be expected to lay stress on Indian minerals in preference to mineral occurrences in other parts of the Empire; the staff is always perfectly fair in giving the information at its disposal.

It is possible that, when the fact of the re-institution of the post of Minerals Adviser to the High Commissioner for India becomes better known, some of the enquiries now directed to the Imperial Institute may be sent here. It should be emphasized that the Imperial Institute Minerals Staff and the Minerals Adviser at India House are in close touch; and, in the end, it really is not a matter of importance who gets the enquiries so long as the best information on Indian minerals is given. The Imperial Institute has the advantage of excellently equipped laboratories where analyses or technical trials can be rapidly made on mineral samples in order to ascertain if they conform with the requirements of possible consumers in the United Kingdom. In this way the materials can be brought to the notice of firms most likely to use them.

Reverting to the class of enquiry addressed to the Institute, about 40 per cent. were for market prices, preparation for the market and names of consuming firms, and were naturally wholly from India or from Indians visiting this country. The minerals chiefly asked about were Mica, Tale,

Garnet, Barytes, Marble, Bauxite, Sillimanite, Beryl, Monazite and Asbestos. Thirty per cent. of the enquires were from firms in London, and were mainly concerned not only with sources of supply of certain minerals but also with the reserves of ores available. Ilmenite, for example, as the raw material for ferro-titanium and white pigments, was the subject of several enquiries. In the latter case, information was also sought direct from this office. The following minerals were also subjects of enquiry: Sillimanite, Saltpetre, Oil, Monazite, Cobalt, Tin, Manganese carbonate (rhodocrosite).

An interesting enquiry emanated from Messrs. Reckitts & Sons, Ltd. They wished to be supplied with analyses of waters from the chief Indian cities, showing the degree of hardness. The information was required in connection with the trade in bath cubes.

Tests were made on five samples of Indian-made portland cement, and the samples were found to comply with the British Standard Specification.

***Chapter IV.—Agricultural Products.—Foodstuffs.**

General Remarks.

With the establishment of the Imperial Council of Agricultural Research the agricultural problems of India have been focussed under one authority and this has, in practice, proved of great advantage. Close relations exist between the Council and the High Commissioner, and all important developments which have a bearing on agricultural and marketing conditions in India are reported immediately to the Council which in its turn keeps this Department *au fait* with developments and problems in India. Under this head may be mentioned the arrangements made for the testing of wheats suitable for cultivation in the new areas of Sind. This request came from the Central Agricultural Research Station at Pusa as also did requests for reports on various fibres. Pusa was asked to send to this office samples of linseed straw for the purpose of experiments in the manufacture of cloth from this material by a patent process. A special report on the problem of the Indian rice trade in Europe was prepared and forwarded to the Commerce Department in 1929, and in 1930 the Imperial Council of Agricultural Research was furnished with a special report on the sales of Indian coffee in the European market.

Provincial authorities have continued to call on the services of the Trade Commissioner for special reports and arrangements for the testing of samples. A few instances may here be mentioned. The Director of Agriculture, Bombay, was furnished with a detailed report on the possibilities of marketing Bombay mangoes in London; subsequently arrangements were made through the good offices of the Empire Marketing Board for research work to be undertaken in connection with mangoes consigned to the United Kingdom, with a view to determining their

* Chapter written by Mr. S. N. Gupta, I.C.S., Deputy Trade Commissioner.

vitamin values. Arrangements have been made for testing and reporting on consignments of mangosteens despatched from Burma. The U.P. Poultry Expert has been furnished with reports, kindly arranged for by the Empire Marketing Board, on the marketing and sale of trial consignments of eggs sent from Lucknow. As a result the prospects of establishing a regular trade in eggs from India to the United Kingdom during the winter months are promising. Various provincial governments were asked to send samples of Sunn hemp for testing and report; the results have been incorporated in the recent hemp pamphlet published by the Empire Marketing Board. The Director of Agriculture, Bombay, was supplied with information about Soya Beans, together with samples for experimental tests in Sind. At the request of the Minister of Agriculture, Punjab, samples of American and Egyptian Cotton, Argentine linseed, Canadian and Australian wheat, foreign barleys and other commodities which compete in Europe with Indian products were obtained and sent out to form exhibits at the Agricultural Museum at Lyallpur. Special reports on Burma rice were forwarded to the Government of Burma during 1928.

The following notes illustrate the enquiries received for Indian agricultural products used as foodstuffs :—

RICE.

The year 1928 witnessed a considerable decline in the purchase of Indian and Burma rices by European countries as compared with the preceding years and more especially as compared with the pre-war period. During 1929 there was some improvement and European sales were better all round than in 1928. One of the contributory causes to this rally in the latter portion of the period under review was certainly the lower level of world prices that ruled throughout 1929 for all varieties of rice, thus stimulating purchases to an appreciable extent; but compared with pre-war figures, Burma rice has suffered a definite set-back in Europe. In pre-war days Burma's exports to Europe exceeded a million tons annually, whereas since the war she has seldom exported more than three-quarters of that quantity. Germany still remains the best European customer of Burma rice; Holland, the United Kingdom, Belgium and Italy are also large purchasers. But all these countries now consume smaller quantities of Indian rice than they used to before the war. This general decline may be attributed to the severe competition which Indian rice encounters in Europe from the newer rices grown in Italy, Spain, America and Egypt. The conclusion of the war found prices of Eastern rices ruling on a somewhat high level. These inflated prices resulted in stimulating the cultivation of rice in favourable regions such as Italy, Spain and Carolina, where the production of rice has increased three-fold since the war, from about 600,000 tons a year to nearly 2,000,000 tons to-day.

The European and American varieties are bolder and more attractive than those of India and Burma. They are elaborately milled or polished and are often coated with oils and even with talc. They are carefully graded and packed and reach European markets in better condition than

Eastern rices. This treatment, added to the fact that cultivation and labour costs are much higher in Western countries than in the East, necessitates the selling of European and American rices at a range of prices much higher than those which India and Burma can secure. But European consumers are ready to pay higher prices for a more attractive product. Marketing investigations conducted by the Empire Marketing Board have disclosed the fact that even the poorest British housewives demand from their retail grocers the best qualities of rice, a result largely due to the rise in the standard of living throughout Europe and North America which accompanied and succeeded the war.

The remedies that must be applied if India and Burma are to recapture some part of the trade lost to the Continent and the United States are two-fold. On the one hand an active propaganda must be undertaken on behalf of Indian and Burma rice in Europe which will bring home to the local housewife the merits of our rices and will convince her that the cheapness of our rice is not due to any inferiority of quality. Indeed, the dietetic value of highly polished rices is probably less than that of the unpolished. That propaganda can be effective was proved beyond question in 1929, when with the generous help and support of the Empire Marketing Board a rice campaign was instituted in the United Kingdom during the autumn, by means of newspaper publicity and pamphlets, which drew attention to the undoubted merits of Indian and Burma rices. This was followed up by the sale of actual samples of these rices at the Newcastle Exhibition and by press interviews granted by the High Commissioner and the Indian Trade Commissioner.

A press interview which the High Commissioner gave in September, 1929, received wide publicity in all the important London and provincial newspapers and formed the subject matter of many editorials, exhorting the public to buy Indian products in the interests of reciprocal trade between India and Britain. The result of this campaign is that many enquiries are received in this Office for supplies of our rices. These enquiries have come not only from wholesale and retail grocers but also from the consuming public. Wholesale and retail grocers have been put in touch with importers and brokers. The name of the interested consumer is sent to a London broker who gets into touch with the wholesale and retail grocer in the neighbourhood of the enquirer; a personal representative of the broker calls on the grocer with an invitation to stock Indian and Burma rice. The enquirers have also been interviewed and informed that they can get supplies from such-and-such grocers in their neighbourhood.

In this connection it is necessary to emphasize the fact that the present enthusiasm in the United Kingdom for buying Empire produce, backed by the efforts of the Empire Marketing Board, offers a golden opportunity to shippers of Indian and Burma rice to regain their lost trade in this market. But to obtain this object something more than propaganda is required, and the second remedial measure suggested is a practical effort to improve the quality, grading and marketing of Indian and Burma rice. It has been pointed out by the trade that one of the main reasons for the

success of the Western rices is their size and appearance which attract the eye of the consumer. If Burma rice is to hold its own in Western markets, its quality must be raised. The use of improved seed must be extended and greater care must be exercised in grading. The Italian and American rices in particular are elaborately graded and the marketing organisation that is responsible for their sales in Europe is highly efficient. Similar measures will be necessary to increase the sale of Indian and Burma rices.

The effects of the rice campaign have reached further afield. The following enquiry is one of several received. A firm in Durban, South Africa, had noticed in an English newspaper the Empire Marketing Board advertisement regarding Burma rice, and asked to be put in touch with a reliable firm of exporters with a view to representation in Durban. Enquiries have also come from Santiago di Cuba, the Bahamas, Brazil and the Bermudas, and several from Ireland. A further illustration of the value of last years' campaign is the purchase of Burma rice for the first time by the Government of Gambia. His Majesty's Trade Correspondent in Gambia had also noticed the Empire Marketing Board advertisement about Burma rice and induced a local dealer to tender Burma rice, Saigon rice having hitherto held the field. The local dealer asked the help of this office in facilitating the co-operation of London brokers through whom prices were being negotiated. This was done, and the result was that the Burma rice tender was successful.

WHEAT.

In pre-war days India was an important exporter of wheat to Europe to the extent of over 1 million tons annually. Her chief markets in those days were the United Kingdom, Belgium and France. At the present day her exports have diminished to nearly vanishing point, the figure for 1929-30 being a mere 10,000 tons to the whole of Europe. During the period under review she imported wheat to the extent of nearly 1 million tons, whereas her exports amounted to only 126,000 tons.

This decline in a valuable export trade is chiefly due to the fact that the home demand for wheat is greater now than pre-war, for wheat as an article of diet is gradually ousting the millets and other inferior food-grains in India. Another reason for the decline in India's wheat exports to Europe is the active competition sustained from Canada, the United States of America, the Argentine and Australia.

A word of caution is, however, necessary at this stage. The buying of foreign wheat by India during the last two years has encouraged the belief in Western markets that India can no longer be relied upon to produce an exportable surplus. It is true that whereas in 1922-23 and again in 1923-24 the wheat crop was nearly 10 million tons, in 1927-28 the crop only yielded a little over 7½, and in 1928-29 only 8 million tons. But the heavy crop of well over 10 million tons in 1929-30 has checked the prospect of further imports into India and has already (to judge from the latest market reports) encouraged sales of wheat to Liverpool. It would appear that in normal years India consumes approximately

9,000,000 tons of wheat annually and that production in excess of that figure constitutes an exportable surplus. India's capacity to produce wheat in excess of local requirements will undoubtedly be stimulated when the Sukkur Barrage Scheme is completed. It is interesting to note in this connection that the agricultural authorities in India are making every effort to ensure that in the new areas good quality strains of wheat will be grown which will meet all requirements, both Indian and European, from the point of view of milling and baking. The Indian Trade Commissioner has been able to arrange, through the kind offices of the Empire Marketing Board, for milling and baking tests to be carried out by the Research Institute of the British Flour Millers' Association on certain types of wheat which are intended to be grown in the new areas in Sind. Should these tests result in the discovery of suitable strains the next decade ought to see a revival of India's exports to Europe, on a scale comparable with that which existed before the war.

BEANS.

There is a steady trade with the United Kingdom in Rangoon hand-picked beans, but no specific enquiries were received for them. Considerable interest is taken in the nutritive value of the Soya bean. This bean is grown and eaten in Manchuria and Northern China, and the flour from the bean is also consumed to a certain extent by the people of Central Europe. An enquiry for Indian Soya beans was received by the Indian Trade Publicity Officer at the Birmingham Grocers' Exhibition in 1929. As London importers from India of Soya could not be traced the enquiry was forwarded to India. Two firms in the Punjab stated that they were interested and their names were given to the enquiring firm. Subsequently the Director of Agriculture, Bombay, desired information about the trade in the United Kingdom and asked for samples. Available information was obtained from the Hull Chamber of Commerce, imports coming chiefly to that port, and through the kind offices of that Chamber samples were obtained and sent to the Director who reported that Soya beans may prove a suitable crop for Sind under the Sukkur Barrage irrigation system. Later a second supply of Soya beans was sent out to the Botanist at the Sakrand Research Station in Sind. Those beans were to be sown during May/June, 1930, and it remains to be seen what success will attend this experiment.

LENTILS.

Lentils from India find their way to the markets of the United Kingdom, Germany and Holland, the first-named country being the largest consumer and also an entrepot centre whence lentils are re-exported to the West Indies for consumption by Indian settlers there. Exports to European markets showed a decline during the last two years. An enquiry was received from an Italian agent at Rome for Calcutta lentils and introductions were given. A firm in Liverpool was put in touch with Indian exporters of lentils. The director of an exporting firm in Calcutta on a visit to London was introduced to London importers of Lentils.

The enquiries received show that the trade in lentils to Europe is not capable of very much expansion, consumption being somewhat restricted.

TOBACCO.

The tobacco crop of India is grown mainly for consumption within the country in the form of hooka-tobacco and biris. Nevertheless an appreciable portion of the crop finds its way abroad. During the period under review, while Germany, Holland and France reduced their purchases of Indian unmanufactured leaf, exports to the United Kingdom increased at a phenomenal rate, from 5 million lbs. in 1923-24 to well over double that figure during each of the last two years. The United Kingdom is now the largest purchaser of Indian Tobacco. The reason for this change is that, while foreign countries have progressively increased their import tariffs, the United Kingdom, on the contrary, has granted a preferential duty on Empire grown tobaccos, and Indian exports benefit by the preference.

The tobaccos that find their way to the United Kingdom are mainly of the "Poolah" varieties, while Holland takes the "Bispath" tobaccos. The manufacturers in this country utilise Indian tobacco for blending purposes for the production of a pipe mixture. To meet this demand the agricultural departments in India are paying increasing attention to the desirability of improving the quality of local tobaccos. Their efforts are being directed not only to the replacing of existing varieties by superior strains both indigenous and acclimatised but also to improvements in methods of cultivation and curing. When these improved varieties find their way to the London market it is likely that Indian tobaccos will meet with increased sales and will acquire an enhanced reputation.

With regard to cigars, the prospect of improved demands in western markets is doubtful. The United Kingdom constitutes now almost the sole market in Europe for Indian cheroots, and imports into the United Kingdom have now dwindled to half the pre-war quantity. Germany, Spain, Turkey (a very good pre-war customer) and Denmark have completely lost interest in this trade. This result is mainly due to the very high duties now levied on cigars in Europe generally, and also to the fact that tariffs are frequently adjusted to encourage the import of leaf while discouraging imports of the manufactured product. The Trade Department of the High Commissioner's office has done and continues to do much to push the sales of Indian cigars, by displays at trade exhibitions and fairs in the United Kingdom and Continent and by the sale of samples. The Department is also represented on the Tobacco Sub-Committee of the Empire Marketing Board. This Committee is responsible for the collection and interchange of data and information about Empire tobaccos and the discussion of Empire problems, *e.g.*, research work with a view to improving quality and aroma. It is understood that, on the Committee's suggestion, it is intended to summon a Conference of research workers in various parts of the Empire to discuss questions of interest to the tobacco trade, and it is hoped that research workers from India will

take part in this Conference and will thus get an opportunity of learning what is being done in other Empire countries to overcome difficulties which are shared by India.

TEA.

The United Kingdom still remains the great centre of the World's tea trade. Not only is its consumption per head of the population, the highest of any country, but it continues to act as the world's tea distributor both to the Continent and North America, though Canada and the United States of America also buy direct from India. The tea trade has, however, suffered during the last year and a half from depression, due apparently to that overproduction which is to-day so widespread a feature of the world's markets for agricultural and plantation products. The high prices obtained for Indian teas in 1926-27 and 1927-28 undoubtedly led producers to believe that higher profits would accompany increased acreage and larger exports. The only result, however, was an increase of stocks which indicated that, at the levels then prevailing, saturation point had been reached.

For the greater part of 1929 Indian teas, with the exception of the finest Darjeelings, have sold at unremunerative prices, often below the cost of production. Tea has, however, continued to pour into London, the imports for 1929-30 being higher than in any of the previous three years. The consumption of tea on the Continent increases very slowly. Canada drinks more tea, but the United States of America show a poor response to the advertisement campaign carried on by the Indian Tea Association in that country. Russia, a valuable customer in pre-war days (buying annually 180 million pounds from India), is concentrating on her own local production. In the United Kingdom considerations of price have turned the attention of blenders to the lower grades of tea produced in the Dutch East Indies, which are increasingly used for blending purposes with Indian and Ceylon.

The following remedies to counteract this depression are now engaging the attention of the trade :—

- (a) Restriction of output. It is satisfactory to note that the growers themselves have taken the first step in this direction. The restriction scheme, to which the Dutch growers have agreed, enforces a reduction of approximately 10 per cent. of the previous year's crops. This action will, in time, have its effect upon prices, but its merits are not merely confined to a probable increase in the price level. Restriction of output means in practice a reduction of output of the coarser and less profitable grades of tea ; and, as a result of finer plucking, will bring on to the markets better quality teas which are still in good demand.
- (b) The resumption of Russian tea buying. During 1929 negotiations were started for the sale of Indian tea to Russia, but unfortunately broke down on the question of credits. There is little doubt, however, that Russia's demand for tea is

latent and it is possible that sales of Indian tea to Russia might be stimulated if export credit facilities could be extended in London to this trade.

- (c) The sale of straight Indian teas in the United Kingdom markets. It is most important that Empire producers should be able to take full advantage of the present tendency in favour of "Empire buying" in the United Kingdom. If this result is to be secured, the public must obviously be in a position to distinguish Empire from foreign teas. Unfortunately, this is only to a limited extent the case, as most teas are sold under proprietary labels or brands representing a blend of Empire and foreign teas. A "straight" Empire Tea is not available as such, save in exceptional cases. An attempt on the part of Indian growers to secure from the Board of Trade a marking order under the Merchandise Marks Act did not succeed, mainly on account of the opposition of the blenders and distributors who were able to show that very little Empire tea is in fact available as such to the public. In this connection it should be noted that the Empire Marketing Board have recently decided to advertise the staple products of Empire countries and it is hoped that Indian tea will at some future date be featured in the Empire Marketing Board advertisements, but this cannot be done unless and until pure Indian teas are freely on sale and available to the general public. It is understood that the members of the Indian Tea Association are giving their close attention to this problem.

COFFEE.

The United Kingdom, France, Germany and Norway continue to be India's best customers for coffee, but their purchases have declined as a result of the present trade depression. Over-production in Brazil has resulted in the accumulation there of stocks which represent a whole year's supply and act as an incubus on all markets. The Brazilian Control Board's efforts to guarantee prices have failed to ease the situation.

Indian coffee is excellent in quality and still commands the highest prices of any coffee in the London market. It is largely used for the purpose of blending with foreign coffees in order to impart to them a superior flavour. Some producers state that they rely more and more for their sales on the local Indian markets and less and less on the export trade. It is authoritatively stated that better prices are secured at home than abroad, and this phenomenon explains to some extent the shrinkage in India's exports to foreign countries. At the same time there is little doubt that special efforts are desirable to retain existing markets abroad. A Coffee Campaign Board has recently been instituted with the object of persuading the world to drink more coffee and it is understood that the United Planters of South India are considering an invitation to participate in this campaign the results of which, if it is successful, should be to increase consumption and therefore the demand

for Indian no less than for other grades. The Indian Trade Publicity Officer is a member of this Board and is in close touch with developments, which are reported to India from time to time.

So far as the United Kingdom market is concerned, the position is similar to that already described in regard to tea. That is to say, very little if any Mysore or Coorg coffee is retailed as such in the United Kingdom, and thus the British public have no opportunity to exercise their undoubted preference for Empire over foreign coffees. Kenya coffee is retailed under its own name and thus gets full advantage of the movement in favour of Empire products, and it is not unreasonable to assume that Indian coffee would similarly benefit if retailed as "Indian" or "Empire."

SPICES.

Of the spices from India that find their way to European markets in appreciable quantities, pepper and ginger are the most important. The United States of America, Italy and the United Kingdom are the biggest consumers of Indian pepper and their purchases during the two years were up to average. An enquiry for pepper and other spices was received from a merchant in Goteburg, Sweden. He stated that he was acting as agent and wanted direct connection with exporters. His inquiry was published in the Indian Trade Journal and the names of interested exporters were forwarded to the Swedish merchant who was requested to get into touch with these shippers. H.M. Consul at Helsingfors reported that a local firm wanted to be put in touch with pepper exporters in India. The names of exporters were forwarded to the Consulate for transmission to the enquirer. An Italian firm who had received previous introductions for other commodities informed us that they wished to represent Indian pepper suppliers in Italy. The names of exporters not already so represented were sent to the Italian firm with a view to direct business. Another Italian firm wanted introductions for pepper with a view to the purchase of supplies and names were given.

The United Kingdom, Germany and the United States of America are the principal consumers of Indian ginger. All three countries reduced their imports during the period under review. In the case of the United Kingdom a recent order of the Ministry of Health has been the direct cause of a serious reduction in imports of Indian ginger. It appears that in the preparation of Malabar ginger for export the product is treated with sulphur dioxide in order to preserve it during the voyage and to prevent deterioration. The sale of ginger thus treated has been prohibited by the order except for use in the manufacture of mineral waters. The result has been that importers have ceased to buy Indian ginger except in comparatively small quantities. The matter was referred to the Imperial Institute which called for a report from Sierre Leone on the methods of preparation in that Colony where, apparently, no preservative is employed. This report, together with samples, was forwarded to India and the Government Agricultural Chemist at Coimbatore is now investigating the possible adoption of methods of preparation which will not necessitate the use of any preservative. A preliminary report of the



A SECTION OF THE INDIAN GOVERNMENT STAND AT THE NORTH EAST COAST EXHIBITION, NEWCASTLE-UPON-TYNE, 1929.

Agricultural Chemist was considered by the Advisory Council of the Institute, which has requested that officer to continue his research work and to forward samples of ginger prepared without the use of sulphur dioxide. Quite recently a London firm received a sample of good quality ginger from Malabar through their Bombay branch; this sample was quite free from sulphur dioxide. On arrival of the bulk consignment the firm has kindly agreed to forward samples to us for examination.

***Chapter V.—Agricultural Products.—Industrial Materials.**

The following notes indicate the general trend of enquiries received for the staple agricultural products of India used as raw materials for industries; they illustrate the direction and character of demands in the European and American markets.

JUTE.

The trade in jute both raw and manufactured is of long standing and well organised. In spite of this, however, the Trade Commissioner continues to receive numerous enquiries from various sources dealing with jute. These enquiries vary in character. Some are requests from manufacturers to be put in touch with raw jute exporters in India. Others are requests from importers of jute cloth or bags for introductions to manufacturers in India. Both these classes of enquiry represent an attempt to save commissions by direct contact with Indian Shippers. As an illustration of this tendency the following case may be quoted:—A firm in Santiago di Cuba who are manufacturers of wooden bedsteads and of mattresses informed us that they were anxious to be put into communication with exporters of jute and kapok in India. The firm stated that they had previously purchased supplies through commission agents in the United States but as they found that the prices were too high they were desirous of obtaining quotations direct from exporters in India. The firm was put in touch with shippers of jute and kapok. Again, a trader in Montevideo asked us for the names and addresses of jute bag manufacturers in India; he was supplied with a list of manufacturers and advised to communicate his requirements to them. A German firm in Leipzig was also put into touch with manufacturers in the same way. The majority of the enquiries received, however, are from recognised importers desiring introductions to exporters in India.

Another class of enquiry is for Indian shippers and manufacturers desiring to appoint foreign agents, usually on a commission basis. Two concrete examples will illustrate the different methods employed in this office in dealing with such enquiries. In the one case a merchant in Barcelona wished to be put in touch with an exporter of raw jute. His commercial reputation having been verified, his name and requirements

*Chapter written by Mr. S. N. Gupta, I.C.S., Deputy Trade Commissioner.

were forwarded to the Director General of Commercial Intelligence, Calcutta. The latter after local enquiry ascertained that a Calcutta firm of exporters was interested and wished to be put in communication with the Barcelona merchant. This was done, and it may be taken for granted that the introduction was satisfactory, as the Spanish firm has written on two or three subsequent occasions asking to be introduced to exporters of other Indian commodities. In the other case a merchant in Michigan interested in jute wished to represent a jute manufacturer in India; he also asked for "burlap" quotations. As H.M. Consul at Detroit reported favourably on this enquirer, the latter was supplied with a list of firms in India manufacturing jute and requested to get into touch with them direct, stating his requirements.

The countries of origin of the enquiries received and the class of jute goods for which these countries made the enquiries are of some interest. Spain, South America, the United States of America, Germany, France and the United Kingdom were the countries chiefly interested. Spain was more interested in the importation of raw jute than in jute manufactures; South America and the United States of America were interested in raw jute, bags and burlaps, manufacturers and producers being among the enquirers in addition to commission agents. The German enquiries were confined to bags, thread, twist and yarn. France was anxious for bags, her enquiries emanating mostly from merchants. The United Kingdom is still responsible for the largest number of enquiries; these were confined mostly to jute manufactures and more particularly to certain types; moreover, they were received mainly from manufacturers of furniture, upholstery, mats and matting and cords. Jute cord, twine and twist also received attention from manufacturers and dealers in this country.

HEMP.

Indian sunn hemp continues to find its chief markets in Belgium, the United Kingdom and Germany. Italy, France and the United States of America also consumed fair quantities. It is used mainly in the manufacture of ropes, cables, twines and nets. Belgium has been and still is the largest importer of Indian hemp; there is to-day a good opportunity for extending the European markets for sunn hemp. Russia, which before the war was Europe's largest supplier has now, more or less, ceased to export. The area under hemp cultivation in Russia has contracted, and the Government of that country is more interested in the cultivation of flax. There is nothing to prevent Indian hemp from taking the place of Russian hemp in the European market provided that improved and uniform qualities can be made available. Complaints in regard to Indian hemp may be classified under four headings:—

- (a) Irregularity of quality due to indifferent cultivation.
- (b) Admixture of dirt and dust due to retting in muddy water.
(It has been suggested that occasionally there is deliberate addition of extraneous matter.)
- (c) Faulty baling.
- (d) Absence of grading.

The faults which lower the quality of Indian hemp are for the most part preventible and the remedies are not difficult. If it can be impressed on the grower that care in cultivation and retting will result in a better quality fibre which will fetch a much higher price in the market, he will not be slow to improve his methods. This is the main lesson to be drawn from a recently published brochure on Indian Sunn Hemp, prepared under the direction of the Imperial Institute and issued under the auspices of the Empire Marketing Board. Careless grading is also a handicap to the extension of the sales of sunn hemp abroad. A London firm recently pointed out that a strict insistence on grading was the main reason for the phenomenal advance of East African sisal, which is displacing Indian hemp in the world's markets. Purchasers of sisal know exactly what they are going to get, whereas dealers in sunn hemp are always in the dark as regards quality.

This, however, is the picture at its worst. That the inherent qualities of Indian hemp are sound and its prospects in Western markets are bright—granted more skilful preparation and grading—is clear from the Empire Marketing Board brochure which explains to potential users of sunn hemp its intrinsic merits as compared with Russian and Italian hemp. The Imperial Institute has, in the course of the last three or four years, carried out several tests in regard to the tensile strengths of these three qualities after their immersion for various periods both in sea and fresh water. The results have been remarkable in showing that the deterioration in strength after immersion is proportionately less in the case of Indian hemp than in the case of either Italian or Russian. These results have been summarised in the brochure which will give them extensive publicity in Europe. Arrangements have been made to distribute the publication widely in the main consuming countries.

It will be of interest to refer here to the use of sunn hemp in combination with cotton for textile purposes. An important firm which controls a large number of cotton mills in Bombay is investigating the possibilities of such a use; and if the experiments prove that it is practicable on a commercial basis the result should be to increase the world's purchases of sunn hemp.

COTTON.

During the period under review the foreign trade in Indian cotton presents some remarkable figures; which point to the conclusion that the last two years have witnessed the consolidation of the position of Indian cotton in European countries. India's best customers, Germany, France, Italy, Belgium and the United Kingdom, have all increased their takings very considerably; each of these countries have more than doubled their imports of Indian cotton since 1926-27; and indeed, in the case of the United Kingdom, the imports have been more than trebled. The causes of this increase in the exports of raw cotton from India are not far to seek. A large crop in 1927-28 was followed by the long strike in the Bombay mills during the greater part of 1928. As a result the level of Indian prices was below the parity of American prices, while the home demand was negligible. These factors naturally encouraged

exports. As a proof of this larger demand one may point to the increasing interest that is being displayed by Lancashire and by the greater number of enquiries emanating from that source. The complaint has hitherto been that it was difficult to do business in short staple Indian cotton owing to the small quantities available ; that spinners could not count on continuity of supplies from India ; and that owing to the absence of universal standards the spinner did not know what he was buying. Further, the desirability of adopting the " Deferred Delivery Contract " has also been stressed by Lancashire spinners.

As a result of negotiations between the Indian Central Committee and the Liverpool Cotton Association the basis of the Empire Futures Contract on the Liverpool Exchange was lowered from " strict low middling " to " low middling " with effect from July 1929. This and other measures which have been jointly taken by Indian and British trade associations will undoubtedly tend to facilitate the imports of Indian cotton into the United Kingdom. It is fair to assume that these measures have played some part in the increase that has taken place in the last two years in the consumption of Indian cotton by the United Kingdom spinners.

It is important in this connection to remember that local demands on the part of Indian mills for the better types of Indian cotton is keen and that these types are not usually shipped by exporters, except against specific orders. It may with justice be argued that a steady and continuous home demand is more important and more profitable to the producer than an uncertain demand from British and Continental spinners, which may or may not be sustained during ensuing seasons. It is, on the other hand, desirable that the demand for Indian cottons should be as widely spread as possible and from this point of view the recent interest shown in Lancashire in Indian cotton is to be welcomed.

Another factor which has led United Kingdom spinners to enquire for Indian cotton has been the fact that the use of these cottons will help British exports of cotton piece goods to Canada, where the Canadian Government are insisting very strictly on the percentage of Empire material used in any article for which the advantages of the Canadian preferential duty are claimed.

In regard to the question of a deferred delivery contract for Indian cotton, Lancashire has been informed that there should be no difficulty in selling on an extended contract and that any large export firm in Bombay or Karachi would be willing to undertake such business. In this connection it is interesting to refer to the opinion expressed by one firm to the effect that some difficulty may formerly have been felt through the absence of a deferred delivery contract, but that the merchant is now able to overcome this by storing the cotton himself and delivering it to the spinner as and when required at a price which covers both the storage charges and interest on locked-up capital.

With the increasing improvement in the varieties of Indian cotton both as regards quality and staple and with the extension in the area under cultivation likely to follow the completion of the Sukkur Barrage, prospects for developing the sales of Indian cotton in Europe are undoubtedly bright.

One important warning is, however, necessary. The practice of mixing the better varieties of cotton with inferior strains, *e.g.*, Punjab American with Desi, tends to lower the good reputation of Indian cottons abroad and should, at all costs, be avoided. Improvements in this direction would benefit the Indian manufacturer no less than the Indian export trade.

COIR MATS AND MATTING.

The trade in coir manufactures between India and Europe continues on fairly steady lines. Our principal customers are Germany, the United Kingdom, Holland, Belgium and France, all of whose imports were satisfactory during the past two years. Coir yarns, ropes, mats and matting are a regular feature of our exhibition stalls, both in the United Kingdom and at Continental trade fairs, and elicit numerous enquiries; a fair number of enquiries are also received in the ordinary way and go to prove that the trade is a live one and capable of expansion. A firm dealing in carpets, curtains and furnishing fabrics enquired for the names and addresses of manufacturers of coir mats and mattings and was put in touch with Indian manufacturers. Another firm dealing in gymnastic materials was introduced to Indian manufacturers for supplies of coir mats suitable for use with gymnastic apparatus. A Manchester firm, importers and hardware merchants, stated that they were doing a large trade in Indian mats and matting and wanted to be put in direct touch with Indian suppliers. This was done. The latter enquiry is typical of the majority of the numerous enquiries for supplies of coir products. Most of the enquirers report brisk business and desire to have direct dealings with manufacturers.

SILK.

Indian silk, both raw and manufactured, has suffered from the prevailing trade depression. Exports have diminished by one-third as compared with pre-war, the United Kingdom and France being India's principal customers. The Empire preferential duty is, to some extent, responsible for diverting to the United Kingdom much of the Indian silk that formerly went in large quantities to France. Enquiries for silk continue to be numerous both at Exhibitions and in the ordinary course of correspondence. The introduction of Kora silk to the United Kingdom is an interesting case. A firm in Calcutta was put in touch with a London silk importer and the former expressed its ability to ship large quantities of Kora silk. Doubts, however, existed about Kora entering the United Kingdom as undischarged silk and it was stated that no business would be possible unless it was classified as such. After negotiations with the British Customs authorities the latter agreed to classify Kora as undischarged silk, which in fact it is, and in the result satisfactory trade in this material has developed. A London firm with branches in New York wished to get into touch with manufacturers of best quality Kora silk suitable for ties and handkerchiefs with a view to exporting to America. The official agent for the Bihar and Orissa cottage industries

was invited to call on the firm and discuss their requirements and he was able to meet their wishes. The London Chamber of Commerce was put in touch with the Kashmir Silk Factory for silk piece goods for dresses, underwear and furnishing materials. Enquiries were also received from the Continent. The agent of a Paris silk firm, who had seen the silk exhibits at our stand at the Lyons Fair in 1928, sent two samples of silk squares and asked to be put in touch with manufacturers; this enquiry was sent out to India and the names of three interested manufacturers were forwarded to the French agent who later on reported business. A firm in Norway was introduced to manufacturers of silk and silk embroidery. An Italian firm at Milan was put in touch with manufacturers of silk for handkerchiefs and neckwear.

WOOL.

The principal importers of Indian wool and woollen manufactures are the United Kingdom and the United States of America. While the United Kingdom imports both for local consumption and for re-export to America and the Continent, the direct trade between India and the United States of America is of growing importance. As regards raw wool the United Kingdom increased her purchases in 1928-29 but subsequently reduced them. In the case of the United States of America a considerable increase occurred during 1928-29 in her imports of wool from India, an increase which was further improved upon in 1929-30. The period under review may be said to have witnessed a definite improvement in the trade in East Indian wool. This trade had experienced some depression immediately after the war, but has since increased and compares favourably with pre-war levels. India's woollen manufactures consist mainly of carpets and rugs, the exports of which have expanded at a rapid rate as compared with both pre-war and the period immediately following the war. Both the United Kingdom and the United States of America have displayed a greater interest in Indian rugs and carpets, though the latter half of the period under review was not so good as the earlier half.

Enquiries continue to be received for both raw wool and manufactured carpets and rugs. A spinning firm in Tournay, Belgium, asked for introductions to some of the principal exporters of raw wool; the firm was put in touch with a number of exporters. A firm in Bradford stated that they had established a branch office at Boston, United States of America, for the purpose of selling in the American market British wools suitable for carpet manufacturing. They wanted introductions to exporters of Indian wool and were put in touch with exporters at Bombay and Karachi. There is in addition a fair demand for wool waste. Thus a London importer asked to be put in touch with exporters of waste. His enquiry was transmitted to India and was published in the Indian Trade Journal and the names of exporters interested were communicated to the firm. Another London firm sent us a sample of wool waste and desired to be put in touch with carpet manufacturers and dealers in such waste. The firm was supplied with the names of manufacturers in India. An inter-

esting enquiry was received from the British Consul General at Kashgar. He stated that two Indian merchants at Kashgar were desirous of exporting washed and unwashed wool to the United Kingdom market; and he added that all the wool from that district had hitherto invariably found its way to Russian markets. Samples were sent with the enquiry and a request was made that they should be tested in the United Kingdom market with a view to ascertaining prices likely to be obtained for these qualities. This was done and it was learned that the wools were considered suitable and readily saleable on this market. The prices quoted were favourable to the opening up of this trade.

Enquiries for woollen carpets and rugs from India continue to be numerous. A wholesale dealer in Newcastle on enquiring for Indian rugs and carpets was put in touch both with importing firms in London and with exporters in India. A manufacturer in Mirzapore asked to be furnished with the names of importers and departmental stores in the United States of America and the necessary introductions were effected. A firm in Vienna interested in carpets was put in touch with manufacturers and exporters in India. An enquiry was received through the British Consul at Chicago from an important importing company asking for Indian carpets and rugs. The enquirers were put in touch with manufacturers and exporters in India. A London firm who wanted Mirzapore carpets was introduced to manufacturers in that district.

OILSEEDS.

Oilseeds form one of the most valuable items of India's export trade. In 1928-29 they ranked fourth in order of importance and value, though 1929-30 witnessed a slight setback. Exports, however, are below pre-war level owing to the fact that India is crushing her own oilseeds to an increasing extent. Copra, for instance, has now almost entirely disappeared as an export commodity, though a large quantity used to be exported annually before the war. Another factor which has influenced exports is the increasing severity of competition experienced in European markets from palm-oil and other competitive products grown in tropical and semi-tropical countries.

Linseed best illustrates the two tendencies just referred to. The fact that exports of linseed are less than pre-war is due partly to increasing local demands and partly to the severe competition sustained from Argentine linseed. A third factor is the increasing competition of other materials used in substitution for linseed oil in the paint and colour industries. In the markets of her three best European customers, the United Kingdom, France and Italy, the percentage of Indian linseed imported is, as compared with Argentine linseed, a good deal lower than before. The year 1929-30 was, however, a much better year for Indian linseed than the previous year and indeed than most years since the war. The United Kingdom, France, Italy, Belgium, Germany and Holland, all purchased satisfactory quantities during that year. A certain number of enquiries were received for introductions both to exporters

and to crushers and the enquirers were put in touch with shippers in India.

America is the largest consumer of Indian castor seed and requires increasing quantities of this seed. Her imports as well as those of the United Kingdom and France were satisfactory for the past two years. Italy also is, to some extent, interested in Indian castor seed. Cotton seed from India is purchased in increasing quantities by the United Kingdom, the only important market in Europe for this seed. The amount imported in 1929-30 was, however, half of what this country usually takes. Rape-seed is another instance in which increased home consumption is responsible for a diminution of exports to foreign countries. Exports have dwindled from 25 per cent. to 10 per cent. of the crop grown. This is the explanation for the reduced purchases of rape-seed by the United Kingdom, Germany, France, and Italy; the last named country hardly took any rape-seed in 1929; Holland on the contrary, purchased a much larger amount than usual. The European markets for sesamum seed were not satisfactory during the past two years. The United Kingdom took a fair quantity in 1928-29, but reduced her imports in the following year. France, always an important customer, practically ceased to take any interest in 1929-30. Italy's purchases were erratic, amounting in 1929-30 to barely one-fifth of what they were in 1928-29.

Groundnuts provide an exception to the general tendency for India to export less and consume more of her oilseeds. The rapid increases in the area under the cultivation of groundnuts is reflected in the almost annual increase in the exports. In 1928-29, France, for long India's largest purchaser, imported a record quantity, as also did the United Kingdom, Germany, Italy and Holland. Indeed, Germany's imports have increased to such an extent that she now purchases as large amounts as France. The importation into Holland has also rapidly increased. The main reasons for these satisfactory results is the fact that groundnuts are gradually displacing other products as a raw material for the manufacture of margarine and edible oils. The improvement effected in the quality of groundnuts exported from India, particularly as regards the reduction of fatty acid contents, was testified to recently by a witness giving evidence before the Imperial Economic Committee. He stated that since the publication of the results of the investigation conducted by the Empire Marketing Board into the presence of free fatty acids in Indian groundnuts exported to European markets, Indian groundnuts have arrived in the United Kingdom in much better condition and have been freer from fatty acids; the percentage of broken kernels was also much lower. The conduct and results of this investigation were described in the report of the Indian Trade Commissioner for the years 1926-27 and 1927-28, and need not be repeated here. Improvement is also due to the research work that has been carried on in India for some time past for the purpose of discovering superior varieties. These improved varieties are now rapidly replacing the older kinds and it is reported that they are far less troublesome to grow, mature earlier and contain a higher percentage of oil.

OILS (ESSENTIAL AND VEGETABLE).

The United Kingdom and France are the chief buyers of sandalwood oil. Imports into the United Kingdom declined during the period under review as compared with previous years while France purchased larger quantities than before. Indian sandalwood oil is produced chiefly by the Mysore State, and the Mysore Trade Commissioner recently appointed to London is charged with the duty of fostering the sales of this oil in Europe and America.

The sale of lemon-grass oil was very satisfactory during 1928-29 owing to better demand from France and America ; in 1929-30 sales reverted to their normal post-war quantity. A producer in the Punjab was put in direct touch with an importing firm in London.

As regards vegetable oils, castor oil found an excellent market in the United Kingdom during 1928-29 and 1929-30, the sales being well above the post-war average in quantity, but prices were not satisfactory in the latter year. A Bulgarian firm in Sofia desired to be put in touch with exporters of castor oil in Bombay ; this was done and evidently business resulted, as the same firm subsequently asked for introductions to exporters of groundnut oil and later on to pepper exporters. A firm in Bordeaux was also put in touch with shippers of castor oil and seed from Bombay. The local consumption of Indian castor oil is on the increase, and exports are in consequence only half of what they used to be. In coconut oil, India is no longer, on balance, an exporter but an importer. An Italian firm in Genoa, anxious to represent a shipper of coconut oil, was put in touch with exporting firms in Calcutta and South India. Exports of groundnut oil, linseed oil, mustard and rape-seed oil and sesamum oil seldom find their way to European markets though sporadic enquiries are sometimes received for them. Thus a firm in Dublin was put in touch with a Karachi shipper of rape-seed oil. A London firm which enquired for names of shippers of mowra (mahua) oil and cake was introduced to Indian oil mills crushing mowra seed and expressing oil. Another firm desired information about the uses of mowra oil and cake. This was obtained through the Harcourt Butler Technological Institute at Cawnpore and supplied to the firm.

OILCAKES.

Oilcakes form one of those items in the foreign trade of India, the exports of which have rapidly expanded since the War. It is now double its pre-war dimensions. The best known Indian cakes in Europe are linseed and groundnut ; cotton cake and coconut cake are not so familiar. Belgium, which is the only country in Europe interested in coconut cake, appears to be buying these cakes in increasing quantities. Cotton cake is purchased by the United Kingdom and Germany, the former having decreased her requirements during the last two years while the latter's imports have been somewhat erratic. In view of the enlarged area under groundnuts in India it is natural to expect an increase in the exports of groundnut cake. The United Kingdom and Holland took larger amounts, but Germany has taken much less than formerly. While the purchase

of linseed cake by the United Kingdom remains steady, Holland and Belgium were irregular in their imports.

Many enquiries have been received during the last two years for Indian cakes, most of them being from United Kingdom importers desiring to be put in touch with shippers or crushers. Thus a large firm of importers in Glasgow was introduced to both shippers and crushers of all kinds of cakes; another firm in London wanted the latest copy of the Exporter's Directory, having found the previous issue useful, and asked particularly for names of oilcake exporters. Some enquiries were also received from the Continent and one from America. A firm in Denmark applied through the Danish Consulate for introductions to oilcake shippers and these were given. An importing firm in Holland wished to get into direct touch with oil mills in India and thus to save the commission normally paid to shippers at the Indian ports. An enquiry was received through the British Consulate in New York from an important Fisheries Corporation in America wanting to establish direct contact with actual oil mills crushing groundnuts and linseed. This Corporation further stated that in regard to groundnut cake they wanted cake that was crushed from the decorticated nuts. This enquiry was sent out to India and the names of mills interested were forwarded to America, though it was reported that mills generally crushed the nuts in an undecorticated condition.

Much trouble has been encountered in the United Kingdom for some time past by importers of Bombay oilcakes on account of the presence now and then of an infinitesimal percentage of castor in the cakes. Buyers have tended to strain the real intentions of the British Feeding Stuffs Act which prohibits the importation and sale of cattle feeding-cake containing any trace of substances deleterious to cattle, by refusing to take up consignments containing traces of castor so infinitesimal as to be non-injurious, unless substantial reductions off the agreed price are allowed by the importers. This state of affairs was made possible by the absence in the United Kingdom sales contract for feeding-cake of a clause similar to that in force at Continental ports, such as Hamburg and Antwerp, condoning negligible traces of castor. After consultations with this Department and the Ministry of Agriculture a provisional agreement has been arrived at among the London importers that they will sell feeding-cake only on contracts including such a clause; and this agreement, it is hoped, will result in placing this trade on a more satisfactory basis and thus lead to increased sales.

DYEING AND TANNING MATERIALS.

The exports of indigo appear to be suffering from a gradual and steady decline. The United Kingdom is now the only Western market for indigo from India, and even this trade is decreasing.

Of the Indian tanning materials known in Europe, myrobalams are the most important. They are purchased mainly by the United Kingdom, Germany, France and America. The purchases of these countries have, however, declined during the period under review. One of the reasons for this decline may be ascribed to the fact that myrobalams are

increasingly consumed in India by the home tanning industry, the value of the exports of tanned or dressed hides and skins being to-day double that of pre-war. Several enquiries have been received for myrobalams, the majority being from importers of tanning materials; the following is a typical enquiry. A firm in Liverpool who are large importers of all types of tanning materials asked for and received introductions to Indian shippers of myrobalams. Some of the enquirers wanted to be put in touch with exporters of the solid myrobalam extract. Thus, one firm first wrote for the names of shippers of myrobalams. Subsequently, they asked to be introduced to solid extract exporters as well. This enquiry was sent out to India and shippers of the extract who were interested were referred to the enquirer. The fact that many enquiries for the solid extract are received proves that there is a good market in the United Kingdom for this commodity and that an increase in supplies would be readily absorbed here. An Indian shipper from Bombay on a business visit to Europe was put in touch with importing firms abroad interested in myrobalams and the solid extract. South Africa also appears a favourable market for the extract, in spite of the competition of local tanning materials. An enquirer, a director of a firm at Port Elizabeth, mentioned that there was a good demand in his country for crushed myrobalams and was put in touch with shippers of the crushed variety and of the extract.

Cutch and Gambier are also purchased by the United Kingdom and France and the sales have been steady during the last two years but no specific enquiries have been received for these commodities. An enquiry was received from a United Kingdom importer of tanning materials for supplies of teri pods from India. As these pods do not find a place in the Export List, the enquiry was sent out to India and it was ascertained that two shippers were interested. Their names were referred to the enquirer.

HIDES, SKINS AND LEATHER.

The trade in raw hides and skins from India has suffered from the prevailing depression. The Continent and the United Kingdom have during the past year 1929-30, taken half of the quantities of raw hides they are usually accustomed to import from India. The trade in raw skins on the other hand has been fairly well maintained; tanned hides are in fairly consistent demand and so are tanned sheep skins and goat skins. One of the most striking features of this trade has been the falling off in the demand for the heavier types of hide and the tendency to specialise in light hides and skins. Boots and shoes continue to account for the greater part of the demand for these materials and the tendency is everywhere in favour of lighter classes of goods. The leather trade has suffered from the increasing use of cloth and other substitutes for the boot and shoe trade. It appears, however, that this tendency towards substitution has for the moment reached its maximum and that leather goods cannot be further ousted; although this statement would require qualification if more efficient substitutes were devised.

Many enquiries have been received for hides and skins and leather from importers in the United Kingdom, the Continent and the United States of America. Enquiries are too numerous and too varied to be summarised ; it is sufficient to say that they have come from a large number of sources including, besides the United Kingdom, France, Switzerland, Germany, Spain, Canada and the United States of America. Considerable interest has also been shown in lizard skins for decorative leather work.

Chapter VI.—Trade Publicity.

General Policy.

The trade publicity work of the High Commissioner's office may now be definitely stated to have passed the experimental stage. It has entered a further stage at which certain principles have emerged on which a policy can be formulated. The practical results of that policy naturally depend on the amount of the funds voted by the Assembly ; but it is satisfactory to know that careful experiments have been made to try out different lines of publicity, that the relative values of these lines are now defined and that expenditure can be, and is being, concentrated on those objects from which, on experience, the best results are secured. The following principles have been adopted by the High Commissioner and underlie his general policy in regard to Indian trade propaganda:—

(a) Articles are written by the Indian Trade Commissioner or his staff for the Press on Indian trade subjects, on request. These are useful as a means of bringing to the notice of business men in Europe and America facts regarding India's industrial and commercial development which might otherwise escape notice. In some cases editors are provided with materials from which they or their staff prepare articles.

(b) Press advertisements are expensive. They do not produce results of much practical value to Indian trade in general, and except in rare instances it is left to individual traders to advertise their own goods by this means.

(c) A good collection of photographs of Indian scenes and especially of Indian industries, irrigation, hydro-electric and other schemes of public utility, has been amassed, over 2,000 in number. These are issued on loan, provided the obligation to the High Commissioner's office is acknowledged, thus bringing the existence of the office to the notice of the general public. No charge is made for this service, but special safeguards are necessary to prevent competition with private dealers, and in cases where the request is made for purely commercial purposes the enquirer is referred to such dealers. The drafts of articles illustrated by photographs borrowed (with acknowledgments) from the Trade Department of the High Commissioner's office are scrutinised in the Department to make sure that they contain no statements to which exception might legitimately be taken in India.



SPORTS GOODS AT THE INDIAN GOVERNMENT STAND AT THE CANADIAN NATIONAL EXHIBITION, TORONTO, 1928.

(d) Lantern slides (1,500 in number) are freely loaned to educational, social, commercial and philanthropic institutions.

(e) Lectures on Indian industries and trade are given by the Indian Trade Commissioner or his staff on request by such institutions. Thus, during the two years under review, the Indian Trade Commissioner lectured to the Victoria League and the Indian Students' Union and Hostel in London ; to the Manchester Chamber of Commerce ; and to the I.C.S. Society at Oxford. On the Continent, in response to requests from trade organisations, he lectured at Antwerp, Paris, Hamburg, Leipzig, Berlin and Bremen. Professional lecturers frequently apply to this office for materials for their lectures and these demands are met as far as possible. Such lecturers have also submitted draft lectures on India for advice and suggestions, which have been supplied.

(f) In addition to photographs and lantern slides other publicity materials are frequently lent for exhibition purposes, *e.g.*, posters, pamphlets on Indian trade, samples of Indian goods, &c.

(g) Cinema films of India have considerable publicity value. We have now at our disposal about two dozen such films with an aggregate length of over 50,000 feet most of which have been received from the Chief Publicity Officer of the Indian State Railways, Delhi. Films have also been supplied by the Burma Government, by the Tata Iron and Steel Works and by the Indian Tea Association. One of the Burma films entitled "Paddy, The Very Best Thing," illustrating the rice industry, has been re-cast and enlarged at a cost of £50, and now shows not merely cultivation and transport in Burma but also arrival on the London market, and the advantages of consumption by the British public in preference to competing rices from other sources. This film was completed in February, 1930, and has proved a most useful adjunct to the campaign in favour of Burma rice. It has been shown at trifling cost in numerous picture houses throughout the United Kingdom.

(h) Expenditure on the above forms of publicity is comparatively small and their direct results to trade cannot be estimated. It can, however, be safely stated that they provide channels by which accurate and reliable information regarding India's industrial and commercial development reaches the public. It is particularly important that the younger generation should acquire this information, as they are potential customers of India whose influence as purchasers of India goods will be, in the long run, the most effective. Special efforts are therefore made where possible to meet the requirements of educational institutions in this respect, and such efforts are genuinely appreciated. The following letter received from the Commerce Master of a County Council School is typical: "We are anxious that the commercial education provided in the higher part of the school for those of our students who will soon be entering into one or other of the branches of industry or commerce should be, as far as possible, of a type that will be of definitely practical value to them. Such an object, we believe, will be best attained by the utilisation of original sources of information. Unfortunately, however, we have insufficient material at hand for this purpose. Even in the town itself

there is no public library that could be used in such a manner. May I further point out that such materials as I have mentioned would be entirely satisfactory for our purpose ? ” To meet such requests and for general publicity purposes a small brochure on India and its products has been prepared by the Indian Trade Publicity Officer. On receipt of this pamphlet the Commerce Master already quoted wrote further : “ I feel sure that the material contained therein would be of definitely practical value to our commercial students and I should be glad to receive a dozen further copies.”

(i) In this connection special reference should be made to the efforts of the Imperial Institute to inculcate in the minds of the youth of the United Kingdom a better knowledge of Empire countries and their resources. The Indian Gallery at this Institute contains many exhibits which have been carefully overhauled and brought up to date. Professional lecturers conduct parties of school children round the galleries of the Institute and pass them on to the Cinema Hall where Empire films are displayed. With these activities the High Commissioner is in sympathy and co-operates in many practical directions.

(j) The most valuable form of publicity from the point of view of practical results has on experience been found to be the display of Indian goods at exhibitions and fairs. This may take the form merely of lending samples and materials to the organisers ; or it may mean the hiring of space and the erection of a decorative Indian stand ; it may include cookery demonstrations to popularise Indian rice, curries, chutneys, tea and coffee, tinned fruit, &c. ; it may extend to the sale of samples during the exhibition and (or) the sale of exhibits after the exhibition is over ; it may also include the booking of orders which are transmitted to Indian exporters to implement at their discretion.

(k) It is not possible to calculate with mathematical precision the financial results of such exhibitions to Indian traders. A rough and ready test is afforded by the number of enquiries received at the stall for Indian goods. Analyses of such enquiries have been made by the Indian Trade Publicity Officer and will be found in chapter VIII.

(l) Thanks to the co-operation of the Empire Marketing Board, who at Empire fairs and exhibitions in the United Kingdom provide free space and decorated stands for the official participation of the Dominions, India and the Colonies, we are able to display Indian goods in many towns which we should not otherwise be able to reach. The only expenditure which falls on the High Commissioner's budget is that involved in collecting, packing and forwarding the exhibits, in their display and supervision and in their re-packing and return to headquarters. The principal exhibits are food-stuffs of all classes. The co-operation of the Empire Marketing Board means that, so far as these exhibitions are concerned, we are able to make our publicity grant do double the work which it would achieve unaided.

(m) The most expensive displays are those staged on the Continent. Here the amount of interest aroused depends largely on the attractiveness of the display as well as on the intelligence (and therefore cost) of the staff

employed. During the past $3\frac{1}{2}$ years we have pursued a consistent policy of trying out, one by one, the various annual trade fairs which are held at different centres on the Continent. We have thus displayed Indian goods at Antwerp (September, 1926), Leipzig (three times, in March, 1927, 1929 and 1930); Milan (April, 1927); Prague (September, 1927); Lyons (March, 1928); Budapest (April-May, 1928); and Lille (April, 1929). We have come to the definite conclusions :—

- (i) that it is better to concentrate on one or two of such fairs annually and to make a good display, than to spread the same aggregate expenditure over three or four displays, each indifferently staged ;
- (ii) that Leipzig affords the best results from the point of view of India's trade with northern and central Europe, and probably Milan for southern Europe ;
- (iii) that it is best to concentrate on manufactured goods, while at the same time encouraging and satisfying enquiries for raw products. Exhibits of raw products are therefore subsidiary at such fairs, while the display of Indian manufactures is made the paramount feature.

(n) In the United Kingdom the best results are obtained from the British Industries Fair which is held in London each year towards the end of February (*i.e.*, just before the Leipzig Fair) and attracts buyers not only from all over the United Kingdom but also from the Continent, the United States and the Dominions and Colonies. At this Fair also it is wisest to concentrate on the display of manufactured goods, while the staff is also prepared to answer enquiries regarding raw products. In addition, special facilities are offered for answering enquiries regarding travel to and in India, and for the sale of Indian Government publications, with the co-operation respectively of the London Bureau of the Indian State Railways and of the Publications Branch of the High Commissioner's office. It is understood that the results secured at both of these sections of the Indian stand at the British Industries Fair are satisfactory.

(o) Other exhibitions and fairs in the United Kingdom fall into three main classes. Firstly, there is the Empire Fair, at which each government of the Empire is encouraged to organise its own display. Secondly, there are the Grocers', Fruit and other exhibitions which concentrate on food-stuffs of one kind or another. Thirdly, there are occasional trade exhibitions which concentrate on special lines such as tobacco or cotton. Of these the first is useful from the point of view of general instruction to the public ; it is from the second and third classes that the best results are secured from the trade point of view, and these specialised exhibitions rank next in order of commercial importance to the British Industries Fair and to the Continental Fairs.

(p) In the display of food-stuffs, it is of vital importance that the public should be able to recognise Indian products as such. There is a keen and widespread preference felt by the British public for Empire products, and if India is to take advantage of this movement she must see that her products are retailed under her own name and are not merely

merged with foreign products in proprietary brands and blends. Indian rice is slowly beginning to reach the public in a form identifiable as Patna or Burma rice. Indian tea and coffee would benefit enormously if the distributors made a determined effort to see that they are retailed either as "straight" Indian or as guaranteed Empire blends.

(q) The sale of samples at retail prices is a distinct step forward. It was introduced with the help of the Empire Marketing Board at the Newcastle Exhibition (May to October, 1929) and is now a common feature of exhibitions and fairs in the United Kingdom. The best results are secured :—

- (i) if the samples reproduce the "Indian" or "Empire" packing and label in which retail supplies are available ;
- (ii) if the public receive recipes with the samples, where recipes are necessary ;
- (iii) if the names of the local grocers who stock the retail supplies are prominently displayed ;
- (iv) if the names of the wholesale dealers are furnished to grocers who wish to secure supplies ;
- (v) if cookery demonstrations are organised in conjunction with the sales ;
- (vi) if the prices charged for the samples correspond with those charged for the same goods by local grocers.

(r) The system of booking orders for wholesale supplies of goods similar to those exhibited has been developed on an experimental basis and will continue if the results are satisfactory. Firms in India are encouraged to forward samples of their goods—particularly of manufactured goods suitable for Western markets—for display in the Indian stands at British and Continental fairs. The term "manufactured goods" should be understood to cover canned goods, groceries and cheroots as well as sports goods, artware, textiles and other manufactures. Enquirers who wish to place trial orders for bulk consignments of goods similar to those displayed are invited to fill in and sign a form giving the necessary details. This form is forwarded by the officer in charge of the Indian stall to the exhibitor for execution of the order at his discretion, on the understanding that neither the High Commissioner nor any of his staff incur any responsibility to either party in regard to the fulfilment or non-fulfilment of the order. It is also possible to arrange for the sale of the exhibits for delivery to enquirers after the exhibition is closed, to enable them to test the market ; the sale proceeds to be remitted to the exhibitor.

The methods described under (q) and (r) above are an innovation. They are based on the principle that it is not sufficient merely to display Indian goods at exhibitions and fairs. It is desirable that the goods should actually pass into consumption so that their qualities may be given a practical test, and that the consumer may be encouraged to acquire the habit of using them. By this means the practical effects on trade should tend to become permanent.

*Chapter VII.—Trade Publicity—Continued.

Exhibitions and Fairs.

Indian stalls were organised by the Publicity Section in 23 exhibitions or fairs during the two years under review. Of these, eight may be described as of major importance involving expenditure in three figures (sterling) while at the same time bringing in a considerable number of enquiries. The remaining 15 took place in different parts of the United Kingdom and included both Empire exhibitions and trade fairs, such as those organised by grocers' associations. The eight major exhibitions comprised four international fairs, one at Budapest (1928), one at Lille (1929), and two at Leipzig (1929 and 1930); and four national fairs, one at Toronto (1928), one at Newcastle-on-Tyne (1929) and two at London (The British Industries Fairs of 1929 and 1930). The Empire Marketing Board assisted with the provision of free space and stands at Newcastle and at both British Industries Fairs, while rent-free space was supplied by the organisers of the Toronto Exhibition. The cost of the Indian stalls averaged £450 at these eight exhibitions. The Empire Marketing Board also assisted at the Empire and Grocers' Exhibitions of the United Kingdom, and thanks to the financial co-operation of the Board the average cost to Indian revenues did not exceed £50. In addition, exhibits of Indian food-stuffs and display materials were sent by the Publicity Section from its own stock to the organisers of 19 fairs throughout the United Kingdom. The expenditure involved was trifling and the result was to provide intensive propaganda in favour of Indian goods over a wide area. The following is a brief account of each of the major exhibitions and of the nine grocers' exhibitions.

1. THE BUDAPEST INTERNATIONAL FAIR, 1928.

The Fair was organised by the Budapest Chamber of Commerce and enjoyed the patronage of the Hungarian Government. It was held from 28th April to 7th May, 1928. The Indian Stand occupied a floor space of 600 square feet and was divided into 13 different stalls, each assigned to a particular group of exhibits.

The exhibits comprised (a) raw agricultural products, drugs, gums, shellac, tanstuffs, minerals, hides and skins; (b) carpets and rugs; (c) cotton, wool, jute, fibres, coir mats; (d) artware and toys; (e) silk shawls and curtains; (f) cotton prints; (g) sports goods; (h) condiments; and (i) essential oils.

The total attendance at the fair was 350,000, of whom 100,000 were reported to be trade buyers. The Indian Stand was very largely attended and was admitted to be the principal attraction of the whole fair. There was no lack of interest in the Stand on the part of business men and 105 enquiries were received, 17 of which were for hides, skins and leather; 15 for tennis racquets; 7 for tea; 9 for artware; and 5 each for rice, spices, shellac and toys; the balance representing a number of miscellaneous articles, viz.: carpets, jute, oilseeds, cotton, &c.

* Chapter written by Mr. B. D. Asli, The Indian Trade Publicity Officer.

The trade depression and sluggish economic conditions prevailing at the time were factors which largely prevented more enquiries from materialising. However, it was evident that on the restoration of normal conditions this country would be interested in fancy skins and leather, hides and goat skins, and cotton for its leather and textile industries. Tennis racquets would do fairly well but artware, silks and carpets had not much chance on account of the high tariffs.

Though the Fair was described as international, it was attended almost entirely by Hungarians.

The cost of participation amounted to £370.

2. THE CANADIAN NATIONAL EXHIBITION, TORONTO, 1928.

This exhibition is an annual event, and the one in which India participated marked the fiftieth anniversary of its inception, during which period it had grown considerably in size, popularity and importance. From a few wooden huts with which it started, it has grown to large proportions, possessing 89 permanent buildings of the aggregate floor space of 2,000,000 square feet. It was held from 24th August to 8th September, 1928.

The Indian Stand covered a floor space of 2,000 square feet, for which no rent was charged. It comprised ten stalls, which according to the usual practice, were devoted to different classes of exhibits. A special grant of £1,000 was sanctioned by the Government of India and exhibits were also specially sent from India. Raw as well as manufactured products were displayed. One of the stalls was allotted to a tea exhibit supplied by the Indian Tea Bureau of New York. Another interesting exhibit received was jute webbing and sash cord. A special display was also made in a separate stall to advertise some of the tourist attractions in India. Materials for this stall were supplied by the Railway Publicity Bureau.

Over 2,000,000 people visited the Exhibition, and the Indian Stand being in one of the most prominent and advertised buildings, it must easily have attracted at least a third of the total number.

The exhibition was not without its trade utility; 70 enquiries were received as classified below :—

Jute, yarn, cloth and webbing	17
Skins and leather	12
Arts and crafts	10
Coir and Palmyra fibres	8
Coir mats, sports goods, silk textiles, spices, drugs, &c... ..	23
	70

As representatives of the exhibitors of jute webbing and sports goods were on the spot, the enquiries received for these articles were referred to them at once, with useful results in each case. They wrote and acknowledged as under :—

“ You are aware that I have fixed up an agency with Messrs. ————. This is the address you gave me and I hope this will lead to further business.”

The other representative wrote :—

“ As direct result of your efforts, I have at hand ten enquiries for this particular product from firms of good standing in Canada. Frankly, this exceeded my expectations . . . We are now in communication with the ten firms mentioned above, and it is only a question of a short time before we will be doing an active business with at least a few of them . . . ”.

With regard to brassware, there appeared to be a fair demand for Indian goods. Chinese brassware was much in evidence in the various stores and shops and there was a call for change which Indian brassware could meet. In this connection, the following figures of imports of brassware into Canada from India might be interesting :—

<i>Before the exhibition.</i>	£
Imports from 1st April, 1927, to 31st January,	
1928	2,380
<i>After the exhibition.</i>	
Imports from 1st April, 1929, to 31st January,	
1930	5,910
<i>Increase after the exhibition</i>	3,530

All the artware exhibits, to the value of £508, were sold to a departmental store with which the exhibitors were put in touch. An order for brassware of the value of £65 was also booked for the exhibitors.

Canada, with its growing prosperity and expansion in trade and industry, offers good prospects for Indian trade, and this exhibition would be a helpful medium in introducing such trade. Besides, it attracts many visitors from New York and the neighbouring American cities, which is also an advantage which should be considered in connection with the question of a repetition of India's participation in it.

3. BRITISH INDUSTRIES FAIR, 1929.

The Fair was held in London from 18th February to 1st March, 1929. As usual a stall was provided by the Empire Marketing Board for the display of food products. On account, however, of the importance of this Fair to manufactured articles other than food products, it was decided to take another stall at the entire cost of the Publicity Section for the display of manufactured articles. Thus, two stalls were run at this Fair. On the Manufactured Goods Stall were displayed exhibits of artware, leather and fancy skins, carpets, rugs, numdahs, Kashmir embroideries, silks, cotton cloth, jute webbing, sports goods, essential oils, basketware and toys. No raw products were on view on either of the stalls. The Manufactured Goods Stalls was remarkable for its imposing Indian design. Both the stalls were visited by H.M. the Queen and H.R.H. the Prince of Wales. The Queen purchased a pottery vase and some enamelled brass articles exhibited by the U. P. Arts and Crafts Emporium, India.

The stalls were largely attended and about 160 enquiries were received, nearly 95 per cent. of which came from firms in the United Kingdom. Of these enquiries, 25 were for artware, 22 for jute webbing and fancy skins, each, 20 for sports goods, 14 for coir mats, and the rest were for numdahs, carpets, embroideries, perfumes, shirtings, rice, canned fruits, drugs, soap, &c.

The cost of these two stalls amounted to £320.

4. LEIPZIG INTERNATIONAL INDUSTRIES SPRING FAIR, 1929.

The participation in the Leipzig Spring Fairs is a scheduled feature of the Publicity Section. At the Spring Fair of 1929, which was held from 3rd to 9th March, larger space was taken than at the previous participation. The Indian Stand was situated on the 4th floor of the Ringmesshaus and covered an area of 760 square feet. The exhibits were displayed in 14 separate stalls, as described below :—

1. Rice.
2. Tea and coffee.
3. Cotton and wool.
4. Raw agricultural products, such as oilseeds, drugs, spices, etc.
5. Oils, vegetable and essential.
6. Jute and jute cloth and bags.
7. Brush fibres and coir mats.
8. Hides, skins, leather.
9. Silk shawls.
10. Carpets.
11. Chutneys.
12. Curry powders and provisions.
13. Sports goods.
14. Artware.

A good Press was secured by means of a couple of articles in the local papers on Indian Trade with Germany. 175 trade enquiries were received, of which 81 were for manufactured articles, 22 for articles partly manufactured, 29 for raw economic products and 39 for food products, raw and manufactured. The more important enquiries were as under :—

Fancy skins	..	..	..	..	..	..	16
Sports goods (<i>i.e.</i> , tennis racquets and football covers)	..	..	..	..	..	..	18
Hides and skins and leather	..	..	..	..	..	..	22
Jute	..	..	..	..	..	..	14
Coir mats	..	..	..	..	..	..	13
Artware	..	..	..	..	..	..	12
Curry powders and chutney	..	..	..	..	..	..	18

The enquiries for leather were received from Germany, Austria, Italy, Holland, Hungary and Poland, whereas those for snake and lizard skins (fancy skins) were received chiefly from Germany and Austria. Sports goods were sought by firms in Germany, Austria, Hungary and Switzerland. The enquiries for artware came from Canada, Sweden, Czecho-

Slovakia, Denmark, Iceland and Belgium, whereas all the enquiries for chutney and curry powder came from Germany.

The cost of participation amounted to £445.

5. INTERNATIONAL FAIR, LILLE (FRANCE), 1929.

This was the second time since its inception that the Publicity Section took part in a trade fair in France. The first participation was in connection with the Lyons Fair a year previously.

The Lille Fair was held from 6th to 21st April, 1929. On account of the composite nature of the exhibits it was considered best to take vacant space and erect a temporary pavilion for the Indian exhibits exclusively, instead of occupying a stall in one of the Fair buildings. A separate pavilion was thus constructed in Indian style on a very prominent site in the grounds and all the exhibits of the previous Leipzig Fair were transferred to this Fair.

The small Indian pavilion was crowded every day of the Fair but 90 per cent. of the visitors were mere sightseers. During the 15 days of its duration, only 54 enquiries were received, i.e., at the rate of less than 4 enquiries a day. They were 9 for brush fibres, 7 for coir mats, 5 for artware, 5 for sports goods, 5 for raw jute, 4 for leather, 4 for shellac, 4 for cotton and the rest for carpets, oilseeds, drugs, raw wool, essential oils, &c. All these enquiries came from France only, in fact from Lille and the neighbourhood. Few of them were of any importance and on the whole the results were not satisfactory.

The cost of participation was £335.

6. NORTH EAST COAST EXHIBITION, 1929.

This was a special exhibition organized at Newcastle-upon-Tyne, after the style of the British Empire Exhibition of 1924. It was opened by H.R.H. the Prince of Wales on the 14th May, 1929, and lasted for six months, May to October. The Empire Marketing Board took an active part in this exhibition, constructing at their own expense a pavilion, which was placed at the disposal of each Empire country in rotation, for two and three weeks at a time. India was thus in occupation from the 5th to the 31st August, 1929. The pavilion was an extensive building of attractive architecture. On the ground floor were two large shop windows, where a display of the principal products of each participating country of the Empire was held. A cinema theatre and a demonstration kitchen were also provided, where throughout the day cinema films and cooking demonstrations pertinent to the country in occupation were shown. The films shown by India were "Paddy, The Very Best Thing," "Toilers in the Jungle," "Burma Babies," "Tea," "Tata Iron and Steel Works, Jamshedpur," and "The Mystic East" (a tourist film produced by the Publicity Bureau of the Indian State Railways).

The main exhibition hall was on the first floor. This was divided into seven principal stalls on which there displayed exhibits of rice, tea, coffee, spices, cigars, chutneys, jams, jellies, sauces, canned fruits, &c. A

working diorama of an Indian rice field depicting threshing operations and the transport of rice from the field to the market in bullock carts was shown on the rice stall. Similarly, on the tea stall was shown a realistic diorama of a tea plantation with a factory in the background. The centre-piece was a figure of an Indian, holding a balance to show the extent to which imports into India from the United Kingdom exceeded imports to the United Kingdom from India ; with the slogan " Buy more Indian goods to enable her to buy still more goods from you " written across the beam. To introduce Indian food-stuffs and induce the grocers to stock them the system of selling samples and giving at the same time the stockists' addresses to the buyers was devised. This worked very successfully as, during the period of India's occupancy, Indian food-stuffs were stocked at several grocers' shops in the Newcastle area. One first-class restaurant specially engaged an Indian chef to serve Indian dishes.

The sample sales amounted to :—

				£
Rice	..	..	1,630 packets ($\frac{1}{2}$ lb.)	.. 24
Tea	..	..	3,144 packets (2 oz.)	.. 61
Chutney	..	..	1,941 bottles	.. 24
Canned fruits	..	..	374 tins	.. 35
Cigars	..	..	5,604 pieces	.. 96
Total ..				£240

By arrangement with the suppliers of the samples, a margin was kept between the purchase and sale prices, from which to meet claims for losses, breakages, &c. The above sales resulted in a nett balance of £42 in favour of the Publicity Section.

The stall was formally opened by the High Commissioner and the Lord Mayor of Newcastle was in the chair at this ceremony. The previous day the High Commissioner broadcasted from the B.B.C. Station an invitation to his listeners to visit the Indian stall, and the response was more than satisfactory.

The exhibition appealed to the public and not to the trade. The propaganda was therefore carried on among the public. No trade enquiries were received.

With the exception of the running expenses, the cost was met by the Empire Marketing Board. The running expenses of the Publicity Section amounted to £260.

7. BRITISH INDUSTRIES FAIR, 1930.

This Fair was held in London from 17th to 28th February, 1930. The policy adopted during previous years of having two stalls at this Fair was continued. Exhibits were called for from India as well as from firms in the United Kingdom and a good selection was received. Among the new exhibits received, the more noticeable were saddlery, ladies' hand-bags (leather), pharmaceutical preparations, lace and pencils.

The food-stuffs stall was in the Empire Marketing Board Section, as usual, and the manufactured goods stall was placed in the Fancy Goods Section. At the latter stall, exhibits of raw cotton, jute, wool and other fibres were also displayed. These exhibits were by actual results found to be inappropriate for this Fair, or at any rate, for this section. At the food-stuffs stall, samples of rice and cigars were sold. The sales amounted to 2,000 cigars and 480 half-pound packets of rice, which realised £29 and £7 respectively. A new departure in the manufactured goods stall was the receipt of orders for artware for transmission to the exhibitors concerned. Thus, orders to the value of £45 for lace and £9 for toys were received. The trade enquiries received numbered 290, of which 260 were from the United Kingdom, the rest being from other countries and especially from Australia, Germany and France. They were mostly for manufactured goods, *e.g.*, 33 for brassware, 23 for lace, 14 for ladies' hand-bags, 20 for toys, 17 for fancy woodwork, 12 for silk prints, &c.

The food-stuffs stall was, as usual, erected by the Empire Marketing Board at their own expense, while the running expenses were defrayed from the Publicity Section of the High Commissioner's budget. With regard to the manufactured goods stall, the entire expenses were borne by the Publicity Section. The total cost to the Publicity Section for the two stalls amounted to £360.

8. LEIPZIG INTERNATIONAL INDUSTRIES SPRING FAIR, 1930.

This Fair was held from 2nd to 8th March, 1930. The same stand as at the last Spring Fair was taken again at this Fair. It was located in the centre of the floor, and was thus served by two arterial gangways, one on either side. The interior lay-out consisted of 12 stalls, each allocated to a separate group of exhibits.

The exhibits were of the same kind as those of the last Spring Fair, except that exhibits of pencils, lace goods, and pharmaceutical preparations were added this time, whereas exhibits of chutneys and carpets were omitted. Exhibits were received from 14 firms in India and 4 firms in the United Kingdom. Invitations to Indian firms to send exhibits were issued widely through the Director-General of Commercial Intelligence and the Provincial Directors of Industries, and the response from India was better than during previous years, though a still better response would be welcomed.

Attendance was satisfactory and enquiries were received from 178 different firms and individuals, the number of enquiries being 242. They covered a wide range of 38 different classes of goods and emanated from 24 different countries, of which Germany contributed 54 per cent. and Poland 13 per cent. Most of the enquiries were for manufactured goods as detailed below :—

Skins and leather	..	..	..	..	..	41
Sports goods	..	..	..	..	..	33
Coir mats	..	..	..	..	..	16
Brassware	..	..	..	..	..	12
Lace goods	..	..	..	..	..	12

There was also a fair number of enquiries for raw products, *e.g.*, 15 for fibres, 13 for shellac and 9 for raw jute. Enquiries were also received for articles not exhibited, *viz.*, bamboos (suitable for skis, cigarette holders, and fishing rods), baskets, brocades for ladies' shoes, feeding-stuffs, &c.

Pencils and pharmaceutical products were each assigned a separate stall. Several kinds of pencils were exhibited, *viz.*, black and coloured, soft, hard, medium, writing, copying, &c. Most visitors, even though not commercially interested in them, tried the various types, for which facilities were provided at the stall, and commented favourably on their writing qualities. They were quite up to standard in every respect and attracted some trade enquiries. It cannot, of course, be claimed at this stage that these enquiries led to actual business, as that would depend on prices, capacity for mass production, marketing opportunities, &c., but it was noteworthy that Indian pencils did evoke enquiries from Germany, Holland and Poland.

Pharmaceutical preparations also did not fail to attract the notice of those interested. However, from the very nature of these goods, mere enquiries could not be expected to lead to much. They should be in the hands of an active agent aided by systematic advertising. Three firms, *viz.*, two in Poland, one in Germany, evinced special interest in these exhibits, and they were put in touch with the exhibitors and their London agents.

The whole of the lace exhibits and a part of the arts and crafts exhibits were sold, mainly to trade buyers, at the end of the Fair. There was an advantage in thus disposing of the exhibits, as these buyers had not handled this kind of goods before and they purchased them as a trial.

The cost of participation was £150.

In conclusion, it may be observed that a fair of this character is more suitable for manufactured goods than for raw products, and Indian manufacturers would be well advised to take more advantage of the facilities accorded by the Publicity Section for exhibiting their products in such fairs. They should not fight shy of sending their exhibits in the pessimistic belief that their products have no trade prospects in Europe. Buyers come to these fairs from all corners of the world and Indian goods will be given a trial, especially as it will cost the manufacturers nothing, or very little, to exhibit.

9. GROCERS' EXHIBITIONS.

Stalls were provided by the Empire Marketing Board at the following Grocers' Exhibitions :—

1. Manchester Grocers' Exhibition .. 17th to 26th April, 1928.
2. International Grocers' Exhibition, 22nd to 28th September,
London 1928.
3. Cardiff Grocers' Exhibition.. .. 30th October to 19th
November, 1928.
4. Birmingham Grocers' Exhibition .. 15th to 24th January, 1929.
5. Plymouth Grocers' Exhibition .. 15th to 20th July, 1929.



FOOD STUFFS STALL OF THE INDIAN GOVERNMENT AT THE BRITISH INDUSTRIES FAIR, 1929.

6. International Grocers' Exhibition, 21st to 27th September, London 1929.
7. Hull Grocers' Exhibition 10th to 16th October, 1929.
8. Birmingham Grocers' Exhibition . . 14th to 25th January, 1930.
9. Glasgow Grocers' Exhibition . . . 4th to 15th March, 1930.

Exhibits of food-stuffs only were displayed on these stalls. They comprised rice (Burma and Patna), different kinds of tea and coffee, lentils, split peas, spices, groundnuts, canned mangoes, guavas, lychees, mango pulp, chutneys, pickles, sauces, curry powder, jams, jellies, pahpadums, Bombay Ducks, &c. ; cigars and cheroots were also displayed at all these exhibitions (though they did not come strictly within the scope of the grocery trade) and attracted considerable attention.

These exhibitions were useful in enabling the Publicity Section to establish contact with the retail grocers and this was done by means of conferences where various Indian products were discussed. During the currency of these exhibitions, the officer in charge of the stalls paid personal calls at the grocers' shops, wherever possible, brought the Indian products to their notice, and discussed with them the possibilities of their stocking them.

These exhibitions were also attended by the public who took full advantage of the opportunities afforded them to buy samples of Indian products at ordinary retail rates. Though enquiries were not expected at these exhibitions, 125 enquiries were altogether recorded.

As to cost, only the running expenses had to be paid by the Publicity Section. They amounted in all to £320 for the nine Exhibitions.

***Chapter VIII.—Trade Publicity—Continued.**

Exhibits and Enquiries at Exhibitions and Fairs.

The chief object of the Indian stalls organised by the Publicity Section of the Trade Department at exhibitions and fairs is to display Indian goods, to interest the general public and traders in such goods and to stimulate enquiries which will lead to definite orders. The total number of enquiries recorded at exhibitions during the two years under review was about 1,300, of which 386 or 30 per cent. were for food products, raw as well as manufactured, 621 or 47 per cent. for wholly manufactured articles other than food products, 153 or 12 per cent. for partly manufactured articles and 140 or 11 per cent. were for raw economic products. The largest number of enquiries were received at the British Industries Fairs and the Leipzig International Industries Fairs, followed by the Canadian National Exhibition at Toronto and the Budapest International Fair. They emanated from twenty different countries, of which the most important from the point of view of the number of enquiries received were the United Kingdom, Germany, Hungary, Canada, France, Poland, Austria, Czecho-Slovakia, Denmark and the United States of America.

*Chapter written by Mr. B. D. Asli, the Indian Trade Publicity Officer.

FOOD PRODUCTS.

Almost 80 per cent. of the enquiries for food products were received at exhibitions in the United Kingdom. Of the remaining 20 per cent. more than three-quarters originated at the two Leipzig Fairs and the balance chiefly at the Budapest Fair. This result was natural in view of the fact that almost all the exhibitions particularly appropriate to food-stuffs, in which participation was undertaken, were held in the United Kingdom. Of the 400 odd enquiries for foodstuffs, nearly 30 per cent. related to raw food products, such as rice, tea, coffee, spices, &c., and the balance was in respect of manufactured food products, namely, chutneys, jam, jellies, curry powders, canned fruits (mangoes, guavas, lychees), cigars, cheroots, &c.

Rice from India and Burma suffers from the competition of Italian, Spanish and American varieties which although more expensive, nevertheless attract customers by careful grading and attractive appearance. It has been the special task of the Publicity Section to draw the attention of the public, in the United Kingdom and on the Continent, to the superior merits of the best classes of Indian and Burma rice. Attractive half-pound packets of selected Burma and Patna were accordingly prepared, each containing a recipe of the best method of cooking Indian rice. These packets were sold as samples at the exhibitions and the addresses of the grocers who agreed to stock Indian rices were furnished to the purchasers so that they could obtain their future requirements from these grocers. Thus, steps were taken to establish a contact with the grocers. This propaganda was first started at the North East Coast Exhibition which was held at Newcastle-upon-Tyne in August, 1930. A wholesale firm dealing in similar Indian rices in packet form was invited to follow up this propaganda. At the outset the firm observed as follows :—

“ We shall, no doubt, have a difficult job to introduce Indian rice . . . but with the help which you can give, we feel sure we shall succeed, and we only mention this to you as you may consider it advisable to have some special effort made amongst the grocers to disabuse the minds of the fact that the only rice which can sell, or as one grocer put it, which should be sold, is Spanish-Japan.”

At the end of a month's trial of the propaganda, the same firm wrote :—

“ We as one firm handling Indian rice will be able to arrange for stocks to be held by grocers in most parts of the country. This is confirmed by the fact that in the Southern part of England, since the advertising appeared, we have been able to put stocks into a very large number of the grocers' shops (400 odd in London delivery area).”

Tea and Coffee, though they were featured at every food exhibition in which this Section participated, failed to rouse the interest of the grocers. The reason was obvious. These articles were always sold as blends and a display of pure Indian tea and coffee could hardly be expected to produce much effect beyond advertising the fact that they were produced in India. If blends of all-India or all-Empire tea or coffee were produced and marketed under proprietary brands so as to make their Indian or Empire

origin recognisable, a propaganda by exhibitions and other means would no doubt prove of great value. Pure Indian blends were thus put up experimentally at two exhibitions and samples thereof were sold, as in the case of rice. They were well received by the public but were not followed up by the grocers as no regular supplies were forthcoming.

Manufactured food-stuffs received, as stated above, the greater number of enquiries. Mango, chutney, cigars and cheroots were found to be particularly popular. Food-stuffs could well be introduced by inculcating different methods of their uses. Thus, the use of chutneys with cold meats, fish and sandwiches formed the subject of one of the slogans of the propaganda, and now mango chutney can be seen at several cold meat counters in this town, which was not the case before. Canned mangoes evoked a very limited interest, but then the supply was still more limited. In fact, exhibits were not available for several exhibitions. There is certainly a market in the United Kingdom, and probably on the Continent as well, for canned mangoes. Care must be taken to avoid stringy and tasteless varieties and to concentrate on those of good flavour. *Pahpadums* and *Bombay Ducks* are still in the realm of curiosities but there is more hope for the former than the latter, if they are supplied in a more attractive form. For the present the United Kingdom is the best market for the manufactured food products mentioned above. The United States of America afford the next best scope, particularly in chutneys. In Europe, Germany and Budapest offered a small scope for chutneys. On the whole, therefore, it would be best to concentrate propaganda for these products in the United Kingdom for the present.

SUGGESTED PREPARATIONS.

More food products should be presented in attractive cartons or other containers, and if possible, in a prepared form, with directions for use, recipes, advantages to body-building, &c. The following are a few suggestions, the commercial possibilities of which might well be considered by some enterprising firms :—

Vermicelli.—This article is fairly well known in the United Kingdom and can be obtained in London at 6*d.* to 7*d.* per pound retail. It is used for puddings, custards and in soups, but other uses can easily be devised. Italy is the principal supplier at present. India also makes it and in the streets of Bombay it is hawked in basket loads as “*Sev*” or “*Sevyian*.” The Indian “*Sev*” is hand-made and is therefore thick and of uneven quality, whereas the Italian vermicelli, being machine-made, is finer and of uniform quality. It is the finer quality that sells best, though there is a market for the thicker quality also ; but the strands must be of even thickness. Up-to-date machinery, capable of turning out all sizes can be had at a comparatively small cost, and it should not be difficult to make vermicelli in India as good as Italian and market it in the United Kingdom at competitive prices. It should be packed in cartons so that its Indian origin can be recognised, in order to take advantage of the propaganda in favour of Empire goods.

Pahpadums.—As at present exposed for sale in round boxes, they are known only to those initiated in Indian dietary technique. They have a

special taste which has to be cultivated and as a first step to it they should be presented in a more popular and inviting form. They should be made uniformly round and smaller in size. Their chief constituents are pulses and spices. As the former possess nutritive quality and the latter digestive, packers should take advantage of these facts and emphasize them in attractive captions on the outside of the containers.

Cashew Nuts.—They are exported at present from India, chiefly Madras, but are mostly utilised in oil-crushing and confectionery. They are hardly known as edible nuts. These delicious nuts possess possibilities in this direction if selected qualities are roasted and offered for sale in attractive containers.

Groundnuts.—Like cashew nuts, the ground nuts which are imported into the United Kingdom from India are mainly used for industrial purposes, though a fair amount of ground-nuts are consumed straight as edible nuts in the country. They, however, are mostly Chinese. Bold selected Indian groundnuts might well be tried as such, but for this purpose it would be preferable to ship them shelled and packed attractively.

Crystallised Ginger, Egg Powder and Liquid Egg.—At present, the bulk of these products on the market in the United Kingdom are Chinese. The possibilities of producing them in India might be considered.

WHOLLY MANUFACTURED ARTICLES OTHER THAN FOOD PRODUCTS.

Of the 620 enquiries for manufactured goods, 50 per cent. were received at exhibitions in the United Kingdom, chiefly the two British Industries Fairs, and 50 per cent. at exhibitions outside the United Kingdom as shown below :—

2 Leipzig Fairs	200
Budapest Fair	45
Toronto Exhibition	37
Lille Fair	22
Total ..	304

The articles most enquired for were as under :—

	At exhibitions in the United Kingdom.	At exhibitions outside the United Kingdom.
Artware	58	48
Sports goods, chiefly tennis rackets	29	67
Coir mats	14	40
Lace	20	12
Jute webbing	22	17
Prints (cotton)	11	10
Ladies' handbags (leather)	14	—
Toys	20	7
Total ..	188	201

Other enquiries were for carpets, rugs, numdahs, silk shawls, embroideries, basketware, and essential oils, &c., most of which were received at the United Kingdom Exhibitions. The most extensive field was covered by coir mats, for which enquiries were received from the United Kingdom, Germany, Czecho-Slovakia, Denmark, Holland, Sweden, France, Hungary and the United States of America. Enquiries for sports goods came next in importance, from Germany, the United Kingdom, Hungary, France, and Austria. About 65 per cent. of them were for tennis racquets, 20 per cent. for football covers and the rest for guts and other articles. The enquiries for artware were confined mostly to the United Kingdom, Germany and Canada. Lace enquiries were received only from the United Kingdom and Germany and those for ladies' handbags came from the United Kingdom alone.

The latter articles were exhibited for the first time at the British Industries Fair of 1930 alone, and the lace goods were shown also for the first time at the British Industries and Leipzig Fairs only. This might account for the narrow scope of the enquiries received for these two articles.

Lace goods attracted much attention. Their quality was considered good, the patterns were much admired and the prices were regarded as comparatively low. However, the goods displayed were mostly doyleys. Some other articles, such as table covers, afternoon tea sets and napkins to match, etc., should also be made. Tennis racquets have a fairly good market in the United Kingdom and Germany, chiefly on account of their cheapness. It was, however, gratifying to note that they were much better in quality than used to be the case and still they are comparatively cheap. A word of warning might be added that still further improvements of quality are possible. It is certainly important to keep costs and prices at a minimum, but it is false economy to pursue this ideal at the expense of quality, the standard of which should be still further improved and not permitted to decline. In this connection, it would be well to note the following observations recently made by a foreign firm in respect of competition in Indian goods :—

“ I think for such hand products a better price should be maintained and I feel that somebody in such a position as yourself could probably impress upon the producers of these goods not to be always out trying to meet a price but rather to improve their quality and give better work and generally produce a “ quality ” article. They will eventually kill these products in their endeavour always to go a little better in price by taking it out of the quality in production.”

The above remarks should apply not only to tennis racquets, but also to lace goods, cotton prints, numdahs, embroideries, etc. At present, the phrase used in European markets to describe Indian manufactured goods of these classes is “ Indian and Cheapest.” Indian manufacturers and merchants should endeavour to have it altered to “ Indian and Best.”

Football covers were not favourably regarded. There was much room for improvement in them. It should be remembered that the best

Bombay tanned hides are widely used in the United Kingdom for the manufacture of football covers. The raw material is thus available in India. All that is necessary is for Indian manufacturers to select the very best grades of the local material and to employ skilled staff to work it up.

As in tennis racquets, so also in artware, much improvement was noticed in quality and finish. It was also pleasing to note that new varieties in brassware and woodwork were produced. Still there is much room for further improvement. Particularly in brassware the overdone peacock design should now give place to some other and more artistic designs. In this class of goods the United Kingdom was found to be far the best market, mainly on account of the admission of such goods free of all duties. The next best market was the United States of America.

ARTICLES PARTLY MANUFACTURED.

As stated above, 153 enquiries were received for semi-manufactures, of which 20 per cent. originated at exhibitions in the United Kingdom and 80 per cent. at other exhibitions. They comprised 118 enquiries or 78 per cent. for fancy skins and leather, and 22, or 14 per cent. for shellac. The countries, viz., in order of importance, Germany, the United Kingdom, Hungary, Canada, Austria, Poland, Czecho-Slovakia, France, Italy and Holland, were interested in Indian fancy skins and leather. Snake and lizard skins and chrome leather were much in demand.

RAW ECONOMIC PRODUCTS.

Only 6 per cent. of the total enquiries (viz. 140) for raw materials (other than foodstuffs) were received at the United Kingdom exhibitions. The Leipzig Fairs accounted for the bulk of the remaining 94 per cent., most of which were for brush fibres, gums, drugs and jute. The paucity of enquiries for raw products at the exhibitions in the United Kingdom was due to the fact that these exhibitions were not suitable for raw products and only on rare occasions, therefore, were they displayed. Raw products can be shown to advantage only at such exhibitions as specialise in them. Such exhibitions, however, being of rare occurrence, the most effective alternative will be to show them at privately organised exhibitions, to which buyers directly interested in the respective products will be invited.

BUSINESS TRANSACTED.

As a rule, retail sales of goods were not undertaken nor were orders booked on the responsibility of the Publicity Section. However, in the case of arts and crafts and lace goods, if the buyers were not content with merely being supplied with the names of the exhibitors but wished to give orders on the spot, such orders were accepted on the distinct understanding that they were merely received "without responsibility" to the High Commissioner for transmission to the exhibitors concerned. In the same manner, buyers sometimes wished to buy the exhibits as a trial and this was also permitted. Thus the following orders and sales were transacted:—

		Sales.		Orders.	
Canadian National Exhibition, Toronto, 1928.	Arts and Crafts	£508	Arts and Crafts	..	£65
British Industries Fair, 1930.		15	Lace		46
			Toys		49
Leipzig Fair, 1930.		50	Lace		25
	Total	£573			£185

Wherever exhibitors themselves were in attendance or had their own stalls at the exhibitions in addition to displaying their exhibits on the stalls of the Publicity Section, the buyers were referred to them direct and presumably booked orders with them, but no record of such orders could be kept as they did not come within the cognisance of the Publicity Section.

SAMPLE SALES AT FOODSTUFFS EXHIBITIONS.

These exhibitions, which were attended by the public as well as by traders, were organised on the principle that the best method of introducing and popularising articles of food is to encourage the public to taste them. A free distribution of samples was not thought to be either economical or effective, as free gifts of this kind would not be treated with that serious attention which would be given to goods bought and paid for. It was therefore decided to sell samples with the consent and co-operation of the retail grocers. The samples were obtained from exhibitors on the basis of sale or return. Purchasers of samples were furnished with the addresses of the grocers in their localities who agreed to stock Indian products, and were thus encouraged to continue to give their custom to India. A beginning was made in August 1929 at the North East Coast Exhibition held at Newcastle-upon-Tyne and since then the sales were continued at the succeeding five exhibitions held at London, Glasgow, Hull, Birmingham and London. According to the character of the exhibitions, samples of rice, tea, chutney, canned fruits and cigars were sold, and, during the 42 actual working days of these exhibitions, samples of the total value of £385 were sold as shown below :—

	£
Cigars and cheroots	203
Tea	61
Rice (Burma and Patna)	49
Canned fruits	40
Chutney	32
Total	£385

The quantities sold were 13,000 cigars and cheroots, 3,100 packets or about a quarter of a ton of tea (pure Indian blend); over 3,600 packets, more than three-quarters of a ton of rice; 400 tins, *i.e.*, over 7 cwt. net of

canned mangoes. These articles were sold only in single samples to each buyer. Thus, a considerable number of the public were served. That the sales produced results was recognised by three firms, one dealing in cigars, one in rice and one in chutney.

COOKING DEMONSTRATIONS.

Though the average annual import of rice in the United Kingdom amounts to 120,000 tons, the rice actually consumed as diet is estimated at 50,000 tons a year, *i.e.*, only 2 lbs. per head per year. Thus, there is scope for increased consumption. At present, rice is used only in puddings and soups, for the British public do not know other uses of rice, nor do they know the proper method of boiling it. It was arranged, therefore, to give cooking demonstrations at exhibitions, wherever possible. These demonstrations were largely attended and were very successful.

Chapter IX.—Committees and Conferences.

As the result of correspondence initiated by the High Commissioner in the autumn of 1926, the Government of India decided in 1929 to co-operate with the Empire Marketing Board in promoting research schemes of Empire interest, and the Imperial Council of Agricultural Research was recognised as the channel by which applications for financial assistance are communicated to the High Commissioner for India and to the Board. The following are the conditions which such applications must fulfil :—

- (a) The schemes for which assistance is sought must be designed directly or indirectly to further the sale of Empire products in markets of the United Kingdom.
- (b) They should hold out some prospect of being of use to other parts of the Empire and should not be of purely local interest.
- (c) They should not be framed in relief of normal expenditure from local revenues.
- (d) Except in the case of the smaller Colonies, the grants are conditional on some contribution from local sources.
- (e) The Board would refuse to commit itself to any scheme involving recurring expenditure for a period of more than five years.
- (f) Each scheme must receive the support of the Central Government of the country from which it emanates or of an authority duly qualified to act on its behalf.

By the end of March, 1930, the following schemes affecting India had received the sanction of the Empire Marketing Board :—

- (1) A grant of £500 a year for 5 years, to match a similar grant by the Government of Bihar and Orissa to meet the cost of a Lac Expert appointed to investigate the Western markets for natural shellac and to co-operate with the Director of the Lac Research Institute at Ranchi.

- (2) A capital grant of £3,125 and an annual grant of £687 for 5 years, to match similar grants by the Indian Tea Association, Calcutta, to meet the cost of a laboratory at Tocklai for the study of the physiology of the tea plant.
- (3) A grant of £170 to meet the cost of milling and baking tests to be undertaken by the Flour Millers' Research Association on samples of Pusa wheat, in co-operation with the Imperial Economic Botanist, Pusa.

India shares with the Dominions and Colonies the benefits of the Empire buying campaign which is stimulated by the activities of the Empire Marketing Board on its publicity side. These activities take the form of poster and shop displays, the issue of leaflets, participation in exhibitions and fairs, lectures, broadcast talks, Empire shopping weeks and cinematograph films.

India is represented on the Empire Marketing Board by the Indian Trade Commissioner, who is also a member of the Research Grants and Agricultural Economics Committees of the Board. The Deputy Trade Commissioner acts as his substitute on the Publicity and Film Committees and on the Education Sub-Committee (of the Publicity Committee).

The Imperial Economic Committee, which was constituted in 1925, consists of representatives appointed directly by the different governments of the Empire. India is represented by Sir Atul Chatterjee, the High Commissioner, and by Mr. M. M. S. Gubbay, with the Indian Trade Commissioner and the Deputy Trade Commissioner as substitutes. At the Imperial Conference of 1926, the following terms of reference were given to this Committee :—

- (1) To complete the series of investigations into the marketing of Empire food stuffs in Great Britain, and while this work is proceeding,
- (2) to put forward for the consideration of the various Governments concerned (a) a list of raw materials for possible further marketing enquiries, and (b) suggestions for the preparation and circulation of brief preliminary surveys, as suggested by the General Economic Sub-Committee of the Conference (Fourteenth Report of the General Economic Sub-Committee), of any branch of Empire trade and marketing, such preliminary surveys, if the Governments concerned so desire, to be followed up by further inquiries.

Since its constitution the Imperial Economic Committee has issued fourteen reports, namely, seven reports on foodstuffs, one on tobacco and one on timber ; two surveys, of the trade in agricultural machinery and in rubber manufactured goods respectively ; and three reports of a general character. All these reports have been circulated widely to the Indian press and to local authorities and organisations in India, both official and non-official, likely to be interested.

In addition to the work done by the representatives of India on the Imperial Economic Committee, these representatives or others nominated

by the High Commissioner have participated in sub-committee work related to enquiries in progress. Thus Sir Peter Clutterbuck, formerly Timber Adviser to the High Commissioner for India, was co-opted as a member of the Sub-Committee which examined the preparation for market and marketing of Empire Timbers. Mr. Gubbay was appointed Chairman of the Hides and Skins Sub-Committee. The Indian Trade Commissioner served on a sub-Committee to prepare a list of Raw Materials recommended for enquiry. Mr. Gupta, the Deputy Trade Commissioner, is, at the time of writing this report, a member of the Sub-Committee enquiring into the marketing of Tea, Coffee, and Cocoa.

The Imperial Shipping Committee consists of fifteen members, of whom eight represent H.M. Governments in the United Kingdom, the Dominions and India; one represents the Colonies and Protectorates; and five are chosen as being persons experienced in shipping and commerce. There is an independent Chairman, the Rt. Hon. Sir Halford Mackinder, who is also Chairman of the Imperial Economic Committee. The High Commissioner is the representative for India, with the Indian Trade Commissioner as substitute.

The Committee acts under the following terms of reference :—

- (i) To enquire into complaints from persons and bodies interested with regard to ocean freights, facilities and conditions in the inter-Imperial trade or questions of a similar nature referred to them by any of the nominating authorities, and to report their conclusions to the Governments concerned.
- (ii) To survey the facilities for maritime transport on such routes as appear to them to be necessary for trade within the Empire and to make recommendations to the proper authority for the co-ordination and improvement of such facilities with regard to the type, size and speed of ships, depth of water in docks and channels, construction of harbour works and similar matters.

The Committee has issued altogether 21 reports, of which the following were published during the two years under review :—

On the Harbours of Nigeria.

On the Harbour of Singapore.

On certain questions relating to the shipment of grain through the Canadian ports of Halifax, N.S., and Saint John, N.B.

On Hudson Bay Marine Insurance Rates.

The Imperial Institute plays an increasingly important role in making Empire countries and their resources better known to the British public. Different galleries are devoted to exhibits illustrating the social and industrial life, the scenery and natural resources, of each of the Dominions, India and the major Colonies. A Cinema Hall is maintained where Empire films are shown and lectures are given on Empire subjects. The lectures are particularly adapted for parties of schoolchildren who visit the Institute in large numbers; valuable work is thus being done in the education of the younger generation of Great Britain in Empire

resources and products. A feature of the Institute is the work of its Advisory Committees which investigate the resources of the Empire under various commodity groups. The Committees, which are ably assisted by the Institute Secretariat (including expert advisers) comprise representatives both of Empire Governments and of the various trades and industries concerned. They are responsible to two Advisory Councils dealing respectively with Minerals and with Plant and Animal Products, which are in their turn responsible to the Governing Body of the Institute. The High Commissioner represents India on the Governing Body and he nominates officers of his Trade Department to the two Advisory Councils and to the Advisory Committees with which India is closely concerned. The Committees examine enquiries received from official and unofficial sources throughout the British Empire and answer in the light of the scientific or marketing information at their disposal. Enquiries tend to concentrate either on the development of Empire resources or on the British markets for Empire commodities. The number of enquiries, from official and non-official sources in India, is on the increase and there is no doubt that in its reorganised administration the Institute is proving distinctly useful to Indian industrial and commercial interests. The Institute also maintains an excellent library of technical books on scientific and industrial subjects, which visitors from the overseas part of the Empire are especially invited to consult.

The Indian Trade Commissioner has been nominated by the Council of the League of Nations to represent India on the Economic Committee of the League. The principal task of this Committee is to examine and pursue to their logical conclusions the recommendations of the International Economic Conference which was held at Geneva in 1927. The work of the Committee thus falls into three main sections which may be defined as Commerce, Industries and Agriculture. Under Commerce, the Committee has examined the scope and effect of the Most Favoured Nation clause in commercial treaties; the effect of prohibitions and restrictions on imports and exports; the stability and height of tariffs; customs formalities; customs nomenclature; indirect protectionism and the like. Under Industries the most important enquiry has been that into the scope and influence of international industrial agreements. The enquiries relating to Agriculture include an investigation of the causes and extent of the present world-wide depression; also studies in research methods and activities; co-operative effort; and the campaigns against diseases of animals and plants.

In Appendix C to this report will be found a complete list of the various Committees of which officers of the Trade Department of the High Commissioner's office are members, with a brief description of the capacity in which each officer thus serves. These Committees perform a useful function in bringing such officers into contact not only with similar officers on the staff of other High Commissioners or with officers of the British Government, but also with representatives of the various trades and industries handling Indian goods. Attendance on such Committees occupies in the aggregate a considerable part of the time of the Trade

Department, but the information acquired and the connections established are of definite value to India's commercial and industrial development.

In addition to the Committee work mentioned above, reference must also be made to the duty of attendance at international conferences of a commercial or industrial character, which devolves on the Trade Department. The Indian Trade Commissioner accompanies Sir Atul Chatterjee as his adviser during the sessions of the Economic Consultative Committee of the League of Nations which are held at Geneva every spring and was with him also at the Conference of Agricultural Exports convened by the League of Nations in January, 1930. He attended the Second International Conference for the Abolition of Prohibitions and Restrictions on Imports and Exports convened by the League of Nations in July 1928, as substitute delegate for the High Commissioner; and again, in the same capacity, the meeting of the Governing Body of the International Labour Office held in February 1930 and meetings of the Committee which discussed the Organisation of the League Secretariat during the same month. The Deputy Trade Commissioner deputised for the High Commissioner as member of the Committee convened by the International Labour Office to examine conditions of work in the Textile Industry in June, 1929, and the Indian Trade Publicity Officer deputised for the High Commissioner on the Textile Committee of the International Labour Office in December of the same year. The Deputy Trade Commissioner was nominated by the High Commissioner to attend a conference of Sugar Experts convened by the League of Nations in May, 1929. All these meetings and conferences took place at Geneva. In addition, the Indian Trade Commissioner acted as delegate for India, in the absence of Dr. Paranjpye, at a meeting of the International Committee of Educational Cinematography which was held at Rome in February 1930.

Chapter X.—Staff and Location of Office.

Acknowledgments.

In my last report I mentioned that the Government of India had sanctioned a scheme of re-organisation formulated under the instructions of the High Commissioner, whereby my office acquired the standing of a permanent department of his own office. The scheme was brought into effect on the 1st April, 1928. Since that date the department has been strengthened by the creation of two new posts, those of Deputy Trade Commissioner and Minerals Adviser and by the substitution of one higher executive officer on a permanent footing for one temporary post of administrative officer.

Mr. S. N. Gupta, I.C.S., took up his duties as Deputy Trade Commissioner on the 22nd July, 1928. His appointment has afforded me relief in many directions in which I had found it impossible to cope with increasing

responsibilities. He deputises for me on several Committees on which it is important that Indian interests should be represented. He shares with me the duty of attending to personal calls by visit or by telephone, and of dealing with correspondence, which is now much in excess of the capacity of a single officer to deal with. He assumes full charge of the work of the Trade Department during my absence from London to attend meetings of the Economic Committee of the League of Nations at Geneva, or Economic Conferences convoked under the authority of the League.

The post of Minerals Adviser had existed for some years when the office of the Indian Trade Commissioner was located at Winchester House. Its abolition as a measure of retrenchment in 1923 had always been regretted by business circles in the City, and its restoration and the appointment of Mr. G. H. Tipper in November, 1928, to the vacancy have been fully justified in an increasing interest by the public in the capacity of India to produce minerals in common demand. Mr. Tipper is also in close touch with new processes and new requirements of modern trade, and is able thus to focus attention on possible fields for further exploration and development in India.

The new permanent post of higher executive officer was sanctioned in October, 1929, in substitution for that of temporary administrative officer, and in conformity with the cadre adopted by other departments of the High Commissioner's office. A statement is attached which illustrates the varied character of the enquiries by letter, telephone call and personal interview, dealt with by this officer in a single week; see Appendix D.

Mention should also be made of the creation by the Government of Bihar and Orissa of the post of Special Officer, Shellac Enquiry, London, and of the appointment in November, 1929, of Mr. A. J. Gibson, formerly Conservator of Forests with that Government, to the new post. The expenditure is shared equally by the local Government and by the Empire Marketing Board, who have thus evinced in practical form their interest in a scheme which is designed to bring the capacities of natural shellac more closely to the attention of users and manufacturers. For the sake of administrative convenience this officer is attached to the High Commissioner's staff. He works in close touch with the Indian Trade Commissioner.

A statement is attached (Appendix E) which describes in the form of a chart the constitution of the Trade Department of the High Commissioner's Office, together with a brief explanation of the main functions (Appendix F) of each of the officers and clerks responsible through the Indian Trade Commissioner to the High Commissioner. The re-organisation has, undoubtedly, strengthened the Department and has enabled us to cope, more efficiently than was formerly possible, with the growing demands on our time. Although statistics of correspondence are misleading as indications of the extent and progress of the work of an office, inasmuch as they necessarily exclude much personal correspondence and all telephone calls and personal interviews, still they do illustrate the general tendency of the work to expand. The statistics

given in the earlier reports of the Indian Trade Commissioner have, therefore, been brought up to date with the following results :—

Year.					Letters received.	Letters issued.
1927-28	..	..	..	..	4,663	4,818
1928-29	..	..	..	..	5,841	6,835
1929-30	..	..	..	..	6,386	7,389

India House was completed in March, 1930, and during that month the High Commissioner transferred his office from Grosvenor Gardens to the new quarters. The building was formally opened by His Majesty The King-Emperor accompanied by Her Majesty The Queen-Empress on the 8th July, 1930, and a large and distinguished audience was present at the ceremony. After His Majesty had unlocked the entrance doors the royal party proceeded to the Library, where the High Commissioner read an address of welcome to which His Majesty replied. Their Majesties were conducted by the High Commissioner and by the architect, Sir Herbert Baker, to inspect the rest of the building before taking their departure.

The advantages of the move are definite and have reacted to the benefit of the work of the Trade Department in many directions. Not only is the new building more commodious, better lighted and better appointed in every way ; it is more conveniently situated—particularly from the point of view of the Trade Department—within easy access of the City, while contact can no less be effectively maintained both with Whitehall and with the offices of the other High Commissioners. The panelling and furniture of Indian wood of various kinds attract many visitors and enable the Timber Adviser to demonstrate to commercial enquirers the decorative and practical uses to which Indian timbers may be put.

On the ground floor and basement of India House is situated the Exhibition Hall consisting of a gallery, with a ground-floor frontage on the street, and a large hall. Passers-by are attracted by the exhibits in the three front windows on ground level and are permitted to enter and view the Exhibition Hall and exhibits of Indian art which it contains. These exhibits which are presented either as gifts or on loan by the Central and Local Governments in India, by Indian Princes and by private bodies and individuals in response to personal invitations addressed to them by the High Commissioner include artware exhibits of many different classes. Many valuable and interesting gifts and loans have been received—others have been promised and are on their way. A brief description may be given of some of the exhibits at the time of writing ; the intention is to vary them periodically in order to maintain the interest of the public in the artistic and economic development of modern India. A very fine Anritsar carpet covers the centre of the Hall, and Mirzapur and Gwalior carpets are also on view. On the central carpet are prominently displayed a beautiful specimen of a Kashmir shawl (Jamia) presented by His Majesty the King-Emperor and a red howdah-cover embroidered with gold thread presented by Her Majesty

the Queen-Empress. A screen of Indian wood artistically designed and carved, the property of the Queen-Empress, has been received on loan from the Victoria and Albert Museum in South Kensington under Her Majesty's instructions and is shown in the gallery of the Hall. Silk saris from Benares and silk scarves and bedspreads from Bhagalpur are hung over the balustrade of the gallery or grouped against the red sandstone columns of the Hall. A throne-spread of the 17th century, used by the Maratha Kings at Satara, has been received on loan from the Prince of Wales Museum of Western India at Bombay. A Burmese screen and table occupy the centre of the northern wall of the Hall, flanked on either side by decorative brassware lamps, the gifts respectively of the Jaipur State and the Lahore School of Arts. Other artware gifts from Madras, Bombay, Lucknow and Lahore, from Hyderabad, Jaipur, Jodhpur, Bhavnagar and Gwalior are displayed; also prints from Calcutta mounted in rosewood frames; transparencies illustrating irrigation developments in Madras and the United Provinces; British Indian and Indian States Stamps; and artware from the various Arts and Crafts Institutes of India. Five coloured dioramas illustrate India's industrial development, the various scenes represented being those of the Tata Iron and Steel Works at Jamshedpur, the Sukkur Barrage, a Bengal Colliery, a Bengal Jute-Mill and the Yenangaung Oilfield in Burma. All these dioramas, with the exception of the Sukkur Barrage, have been presented by private companies; they are attractively shown behind screens of Indian wood harmonising with the padauk and rosewood panelling and balustrade of the Exhibition Hall. Further dioramas have been promised and are under construction to illustrate a Burma rice-field, the mail steamer lying alongside the mole at Bombay, the ports of Calcutta, Karachi and Rangoon. A list is attached (Appendix G) which gives the names of the donors of exhibits for the Exhibition Hall, together with a brief description of the gifts, as received up to the time of going to press.

An annexe of the Exhibition Hall contains nine show-cases in which are displayed silver and ivory *objets d'art*, lacquerware, brassware, inlaid metal work and fancy textiles. In the annexe there are also on view wooden panels and other wooden objects constructed of Indian timbers. This display has been organised with a view to interest commercial visitors in the three classes of Indian goods thus brought together, namely, artware, fancy textiles and decorative woodwork. It is intended also to organise as soon as possible a Commercial Samples Room which will from time to time be utilised for the exhibition of Indian goods of different classes such as cotton and other fibres, grain, oilseeds, vegetable and essential oils, minerals and mineral products, textiles, hides and skins and leather, artware, sports goods, tea and coffee, canned and bottled goods, &c. When not used for such special exhibitions—lasting perhaps for a week or a fortnight each according to requirements and the convenience of the business firms—the room will be available for a permanent collection of Indian agricultural, mineral and forest products periodically brought up to date and displaying the best samples of staple Indian goods, manufactured and semi-manufactured, as well as raw materials.

I cannot close this report without expressing my acknowledgements to those departments and offices of His Majesty's Government with which I am brought into closest contact and to which I owe a sincere debt of gratitude for assistance rendered to me in my work ; and especially to the Foreign, Empire and Exhibition Sections of the Department of Overseas Trade and to the Foreign Treaty and Statistical Sections of the Board of Trade. I have received much valuable help and advice from H.M. Consular and Commercial Officers on the Continent and in America. I also keep in close touch with Chambers of Commerce and Trade Associations specially interested in India's export trade, both in the United Kingdom and on the Continent and with Trade Commissioners and Commercial Attachés in London of Empire and Foreign Governments.



A SECTION OF THE INDIAN GOVERNMENT STAND AT THE LEIPZIG INTERNATIONAL INDUSTRIES SPRING FAIR, 1930.

APPENDIX A.

RANGE OF PRICES OF STAPLE INDIAN COMMODITIES IN THE UNITED KINGDOM DURING THE LAST THREE YEARS.

Commodity.	Unit.	1927-28.			1928-29.			1929-30.		
		Highest.	Lowest.	Difference.	Highest.	Lowest.	Difference.	Highest.	Lowest.	Difference.
Shellac	shillings per cwt.	270/-	155/-	115/-	242/6	177/6	65/-	205/-	117/-	88/-
Rice	"	16/-	13/9	2/3	14/9	12/7½	2/1½	14/9	10/7½	4/1½
Jute	£ per ton	37/15-	27/10/-	10/5/-	39/7/6	30/12/6	8/15/-	33/-/-	22/15/-	10/5/-
Castorseed	"	19/3/9	16/12/6	2/11/3	19/8/9	16/17/6	2/11/3	18/15/-	15/-/-	3/15/-
Linseed	"	18/12/6	17/-/-	1/12/6	19/7/6	17/5/-	2/2/6	24/10/-	16/17/6	7/12/6
Malabar copra	"	29/17/6	28/-/-	1/17/6	29/10/-	24/5/-	5/5-	25/15/-	22/5/-	3/10/-
Groundnuts	"	24/-/-	20/5/-	3/15/-	21/17/6	17/15/-	4/2/6	21/12/6	14/15/-	6/17/6
Cochin coconut oil... ..	"	49/5/-	46/10/-	2/15/-	48/-/-	41/10/-	6/10/-	41/10/-	35/-/-	6/10/-
Bombay cotton oil	"	35/-/-	32/-/-	3/-/-	32/15/-	28/10/-	4/5/-	28/10/-	26/-/-	2/10/-
Groundnut cake	"	12/-/-	10/10/-	1/10/-	12/5/-	10/15/-	1/10/-	12/-/-	6/15/-	5/5/-
Northern average tea, shillings per lb.		1/11.58	1/3.36	8.22d.	1/6.27	1/2.17	4.10d.	1/5.57	1/0.63	4.94d.
Fine M.G. broach cotton, pence per lb.		11.45	6.90	4.55	10.85	8.15	2.7	9.35	5.85	3.5
Tin	£ per ton	311	224	87	241	206	35	219	159	60
Lead	"	27	19	8	29	20	9	26	18	8

APPENDIX B.

RANGE OF PRICES OF STAPLE INDIAN COMMODITIES IN THE UNITED KINGDOM.

Commodity.	Unit.	1929.				
		2nd April.	1st May.	1st June.	1st July.	1st Aug.
Shellac	shillings per cwt.	190/-	192/6	195/-	197/6	200/-
Rice	"	13/-	12/7½	14/-	14/-	14/3
Jute	£ per ton	33/-/-	30/5/-	29/15/-	30/-/-	32/2/6
Castorseed	"	18/0/0	18/7/6	17/-/-	16/15/-	17/5/-
Linseed	"	18/2/6	17/17/6	16/17/6	18/-/-	20/12/6
Malabar copra	"	24/5/-	23/7/6	22/15/-	22/15/-	24/15/-
Groundnuts	"	17/17/6	18/-/-	17/17/6	17/17/6	20/2/6
Cochin coconut oil	"	41/10/-	40/10/-	39/10/-	N.Q.	N.Q.
Bombay cotton oil	"	28/10/-	26/10/-	26/15/-	N.Q.	N.Q.
Groundnut cake	"	11/15/-	10/15/0	10/5/-	10/10/-	11/5/-
Tea	shillings per lb.	1/5·27	1/4·52	1/4·02	1/3·35	1/1·90
Cotton	pence per lb.	9·35	8·40	8·45	8·55	8·95
Tin	£ per ton	210	196	197	202	213
Lead	"	26	24	23	23	22

1930.

2nd Sept.	1st Oct.	1st Nov.	1st Dec.	2nd Jan.	1st Feb.	1st Mar.	1st Apl.
197/6	187/6	177/6	167/6	152/6	150/-	130/-	122/6
14/3	14/9	14/6	14/-	14/3	14/3	13/9	13/-
32/2/6	29/15/-	28/10/-	26/7/6	28/-/-	27/5/-	24/10/-	24/5/-
17/12/6	17/2/6	17/7/6	17/5/0	16/7/6	16/-/-	15/2/6	15/10/-
21/-/-	23/5/-	23/7/6	23/-/-	22/17/6	19/10/-	18/10/-	18/12/-
24/15/-	25/10/-	24/-/-	24/5/-	24/-/-	24/-/-	22/15/-	23/-/-
20/13/9	20/1/3	19/-/-	18/15/-	17/10/-	16/15/-	15/12/6	16/1/3
N.Q.	N.Q.	N.Q.	N.Q.	N.Q.	N.Q.	N.Q.	N.Q.
N.Q.	N.Q.	N.Q.	N.Q.	N.Q.	N.Q.	N.Q.	N.Q.
11/5/-	11/10/-	10/5/-	10/-/-	9/15/-	8/10/-	7/10/-	7/10/-
1/4·84	1/2·90	1/2·56	1/1·22	1/1·73	1/1·57	1/3·63	1/3·24
8·75	8·55	8·15	7·85	7·70	6·70	6·15	6·45
206	200	185	174	180	174	167	166
23	23	22	21	21	21	19	19

APPENDIX C.

OFFICERS OF THE TRADE DEPARTMENT OF THE HIGH COMMISSIONER FOR
INDIA SERVING ON EMPIRE AND TRADE COMMITTEES IN THE UNITED
KINGDOM AND CONTINENT, MARCH, 1930.

This list does not include the Committees which are ordinarily attended by the
High Commissioner personally.

Main Body.	Committee or Sub-committee.	Representative for India.	Capacity.
Empire Marketing Board	—	H. A. F. Lindsay	Personal, on invitation of Secretary of State for the Dominions.
" "	Research Grants Committee	"	" "
" "	Agricultural Economics Committee	"	" "
" "	Publicity Committee	S. N. Gupta ...	Substitute for I.T.C.
" "	Film Committee ...	" ...	" "
" "	Education Sub-Committee	" ...	" "
" "	Tobacco Sub-Committee	" ...	" "
" "	Committee of Dominion and Colonial Representatives	B. D. Asli ...	Nominated by I.T.C.
Imperial Economic Committee	—	H. A. F. Lindsay	Substitute for H.C.
" "	Raw Materials Sub-Committee	"	" "
" "	Tea, Coffee and Cocoa Sub-Committee	S. N. Gupta ...	" "
Imperial Shipping Committee	—	H. A. F. Lindsay	" "
Board of Trade ...	Advisory Council ...	"	Nominated by India Office.
Department of Overseas Trade	Advisory Committee	"	Personal, on invitation of Parliamentary Under-Secretary.
Imperial Institute	Governing Body ...	H. A. F. Lindsay	Substitute for H.C.
" "	Advisory Council on Plant and Animal Products	"	Nominated by H. C.
" "	Advisory Council on Minerals	G. H. Tipper ...	Substitute for I.T.C.
" "	Hides and Skins Committee	S. N. Gupta ...	" "
" "	Vegetable Fibres Committee	" ...	" "
" "	Vegetable Oils and Oilseeds Committee	" ...	" "
" "	Silk Committee ...	" ...	" "

APPENDIX C—continued.

Main Body.	Committee or Sub-committee.	Representative for India.	Capacity.
Imperial Institute	Timbers Committee	H. S. Tireman ...	Nominated by H.C.
" "	Tanning Materials Committee	" ...	" "
" "	Iron and Steel ...	G. H. Tipper ...	" "
" "	Manganese ...	" ...	" "
" "	Tin and tungsten ...	" ...	" "
" "	Copper ...	" ...	" "
" "	Refractories ...	" ...	" "
" "	Chemical Industries...	" ...	" "
" "	Mica and Miscellaneous Minerals	" ...	" "
" "	Essential oils and resins	A. J. Gibson ...	" "
Empire Cotton Growing Corporation.	Board of Trustees ...	H. A. F. Lindsay	Nominated by India Office.
" "	Administrative Council	"	Nominated by Govt. of India.
" "	Executive Committee	"	Nominated by India Office
British Empire Producers' Organisation	Council ...	"	Nominated by H.C.
" "	Tobacco Committee...	"	"
British Engineering Standards Association	Plywood Sub-Committee	H. S. Tireman ...	Personal as representative of the Governing Council of the Empire Forestry Commission.
Empire Forestry Association	Governing Council ...	" ...	Nominated by the H.C.
Empire Canning Council	Council ...	S. N. Gupta ...	Nominated by the H.C.
Coffee Board of Great Britain	Council ...	B. D. Asli ...	Nominated by the H.C.
League of Nations, Geneva	Economic Committee	H. A. F. Lindsay	Nominated by the Council of the League of Nations to represent India.
Permanent International Association of Navigation Congresses, Brussels	Board of Management	"	Nominated by the Govt. of India.

APPENDIX D.

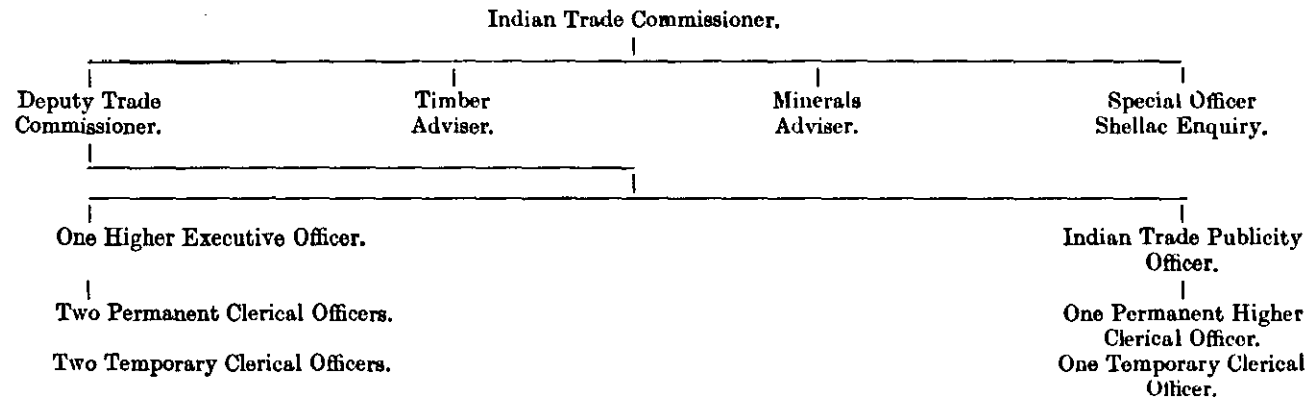
ENQUIRIES DEALT WITH BY THE HIGHER EXECUTIVE OFFICER.

MARCH 27TH—APRIL 2ND, 1930.

	By Letter. (U.K. and India).	By Letter. (Cont. and U.S.A.)	By Phone.	Callers.
1. Trade Enquiries	8	7	1	3
2. Trade Disputes	2	—	—	—
3. Customs Duties and Regulations	5	3	17	3
4. Patent Regulations and Mer- chandise Marks	4	3	1	—
5. Indian Government Statistics ...	—	2	3	1
6. Landing charges at Indian ports	—	—	3	—
7. Special information required by D. of I., India	4	—	—	—
8. Enquiries relating to Indian markets for U.K. and Conti- nental goods	2	2	—	—
9. Miscellaneous	3	—	5	10
Total	28	17	30	17

Grand total = 92.

APPENDIX E.



APPENDIX F.

FUNCTIONS ALLOTTED TO THE DEPUTY TRADE COMMISSIONER, ADVISERS
AND OTHER OFFICERS AND STAFF OF THE TRADE DEPARTMENT.

DEPUTY TRADE COMMISSIONER.

- (1) Interviews and visits.
- (2) Furnishes general commercial information regarding India with special reference to agricultural, statistical and tariff enquiries.
- (3) Furnishes banks with monthly information regarding Indian trade.
- (4) Undertakes special enquiries and reports on Indian economic subjects and visits connected therewith.
- (5) Represents the Indian Trade Commissioner on the following Committees :—
 - (a) Publicity, Films and Education Committees, of the Empire Marketing Board.
 - (b) Vegetable Fibres, Oils and Oilseeds, Hides and Skins and Silk Advisory Committees of the Imperial Institute.

TIMBER ADVISER.

- (1) Interviews and visits.
- (2) Controls the sales of timbers from the Andamans.
- (3) Furnishes general information regarding Indian timbers and forest products and advises on timber exhibits.
- (4) Represents the High Commissioner on the Advisory Committees of the Imperial Institute on Timber and Tanning Materials.

MINERAL ADVISER.

- (1) Interviews and visits.
- (2) Furnishes general information regarding Indian mining and mineral products and advises on mineral exhibits.
- (3) Represents the High Commissioner on the Advisory Committees of the Imperial Institute on Tin and Tungsten, Refractories, Copper, Manganese, Iron and Steel, Chemical Industries, Mica and Miscellaneous Minerals.

INDIAN TRADE PUBLICITY OFFICER.

- (1) Interviews and visits.
- (2) Organises Indian Trade Publicity Schemes.
- (3) Organises Indian stalls at Exhibitions and Fairs and supply of Indian material for Shopping Weeks, Window Displays, etc.
- (4) Represents the Indian Trade Commissioner on the Committee of Dominion Representatives which advises the Empire Marketing Board Staff on their publicity campaigns.

GENERAL AND PUBLICITY STAFF.

- (1) Interview all callers except those who have special appointments with the Indian Trade Commissioner, Deputy Indian Trade Commissioner, Indian Trade Publicity Officer or Commercial Advisers.
- (2) Furnish general commercial information regarding India with special reference to customs duties, merchandise marks, patents, &c.
- (3) Undertake special enquiries and reports on the markets for Indian goods and visits connected therewith; also the investigation of trade disputes.
- (4) Control and supervise Trade Introductions and the card index and other systems for the recording of information.
- (5) Issue on loan lantern slides, films and photographs.
- (6) Distribute publicity literature.
- (7) Arrange for the despatch of exhibits to Exhibitions and Fairs, &c.
- (8) Receive back all publicity material issued on loan and maintain stock registers.
- (9) Supervise the display of exhibits in the Exhibition Hall.
- (10) Supervise arrangements for the display of Indian goods in the Commercial Samples Room.

APPENDIX G.

LIST OF DONORS AND GIFTS TO THE EXHIBITION HALL, INDIA HOUSE.

<i>Donor.</i>	<i>Gift.</i>
H.M. THE KING-EMPEROR	Kashmir Shawl.
H.M. THE QUEEN-EMPRESS	(i) Inlaid "Pinja," fourfold screen. (ii) Gold and Velvet embroidered "Howdah" cover from Benares.
<i>Baluchistan Administration</i>	Photographs of Baluchistan.
<i>Baroda State</i>	Wooden stools overlaid with orna- mental metal work. Patola wall hangings.
<i>Bengal Government</i>	Reproductions of studies by the students of the Government School of Arts, Calcutta.
Trustees of the Indian Museum, Calcutta	Jamdari Sari, Jessore Kantha, Murshi- dabad Tablecloth, and Ivory works of Art.
"Rupam" Journal, Calcutta	Reproductions in colour after Modern Indian Artists. Scenes from the life of Buddha.
The Indian Society of Oriental Art, Calcutta	Teakwood figure of a "Nayika" (Dancer).
<i>Bhavnagar State</i>	Carved Wooden Screen and Wall Bracket.
<i>Bihar and Orissa Government</i>	Silk Bedspreads, Scarves and Cushions.
<i>Bombay Government</i>	Photographs of irrigation works, roads and buildings.
Prince of Wales Museum of Western India	Throne covering of the 17th Century used by the Mahratta Kings of Satara.
Municipal Commissioners for the City of Bombay	Sandalwood table.
Messrs. Tata Iron & Steel Co., Ltd. ...	Diorama of Tata's Steelworks at Jamshedpur.
<i>Burma Government</i>	Lacquer Screen and Burmese Gong on Stand.
<i>Delhi: Indian Posts and Telegraphs</i> <i>Department</i>	A collection of British Indian and Indian State postage stamps.
<i>Gwalior State</i>	Carpets, carved stone lamps, lacquer vases, photographs, "Series," Vases and Earthenware figures.
<i>Hyderabad State</i>	Bider Vases. Embroidered Cloths and Photographs.
Sir Akbar Hydari...	Copies of Ajanta pictures.
<i>Jaipur State</i>	Brass Lantern. Ornamental trays. Enamelled Brass Vase.
<i>Jodhpur State.</i>	Makrana Marble Flower Bowls with Stands. Lacquer lamps.

APPENDIX G—*continued.*

<i>Donor.</i>				<i>Gift.</i>
<i>London :—</i>				
The Rt. Hon. Sir John Simon, K.C.V.O.				Naga Arms and Trophies.
Mrs. L. L. Lindsay	...	...	...	Carved Overmantel.
Mrs. Barnardo	...	...	...	Silk and gold "Sari."
Messrs. Burma Oil Co., Ltd.	...	...	...	Diorama of Burma Oilfield.
India Society	...	...	...	Plates of the "Bagh" Caves.
Messrs. Oriental Carpet Manufacturers (London) Ltd., on behalf of Messrs. E. Hill & Co., Mirzapur, and The East India Carpet Coy., Ltd., Amritsar.				Mirzapur, Agra, Jaipur, Kashmir and Amritsar Carpets.
Messrs. P. & O. S. N. Co., Ltd.	...	...	...	Diorama of s.s. "Viceroy of India" lying at the Mole, Bombay.
Mrs. Sanders	...	...	...	Clay figures and carved Overmantel.
Messrs. Steel Bros.	...	...	...	Diorama of a Burma rice-field.
Messrs. Yule Catto & Co., Ltd.	...	...	...	Dioramas of a Calcutta Jute Mill and a Bengal Colliery.
<i>Madras Government</i>	...	...	...	Rosewood model of the front gate Madura temple. Copperpot, silver embossed. Photographs of irrigation works.
<i>Mysore State</i>	...	...	...	Ornamental Side-board, Sandalwood Casket.
<i>Punjab Government</i>	...	...	...	Brass lantern, lamps and lampshades, Wooden Screen. Upholstered seats and "lungis."
<i>United Provinces Government</i>	...	...	...	Photographs of irrigation works
Thomason Civil Engineering College, Roorkee.				Photographs of the Ganges.