COLONIES GENERAL.

DE OF THE BRITISH EMPIRE

AND

FOREIGN COMPETITION.

DESPATCH FROM MR. CHAMBERLAIN

TO THE

GOVERNORS OF COLONIES AND THE HIGH COMMISSIONER OF CYPRUS

AND THE

REPLIES THERETO.

Presented to both Houses of Parliament by Command of Her Majesty.
July 1897.

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COLONIES GENERAL.

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INTRODUCTORY MEMORANDUM.

Mr. Chamberlain's despatch of 28th November 1895 was written with the object of ascertaining the extent to which the generally alleged displacement of British by foreign goods was really taking place in Colonial markets. Reckoning the South African provinces and protectorates as sufficiently included under the returns for the Cape Colony, it was sent to all except a few of the smaller Colonies, where the market was so limited as not to affect the general conclusions to be drawn from the replies. It was also sent to Cyprus. It will be seen that it has been responded to with readiness from every quarter. In certain cases it has not been found possible to fill up the returns required: in some cases the care and consideration which have been brought to bear on the replies are very marked; and if it be not invidious to select one report rather than another, special mention should be made of those received from Victoria and South Australia.

The Secretary of State for India has obtained a similar return for that part of the Empire, which is appended to the Colonial replies.

In arranging the returns of the various Colonies a roughly geographical grouping has been adopted, with the idea that this may to some extent bring out that similarity in the circumstances and facts of trade which one may expect to find in such parts of the Empire as are in proximity to each other.

The returns are designed to show the progress of foreign competition during the decade ending with the year 1894. They are made in respect of 1884 (the last year of the previous decade), 1889, and 1894. The selection of these single years instead of certain sets or periods of years, while it lightened the labour of compiling the returns, did not materially impair the accuracy with which the proportion of foreign to British importations in any given Colony was exhibited. In a few cases some special importation or falling-off of importation may, to a small extent, vitiate the conclusion drawn in regard to a particular commodity, but these cases are so few that they may be neglected. Again, where a general and marked decrease of importation is due to a crisis or depression of trade, it is possible that the special causes of that decrease may for the time operate upon one class of goods more than on another; this fluctuation would be in part corrected by an average of years, yet that average would conceal the actual facts of the trade during a crucial year. In fact, some of the Australian reports do suggest, in respect of the year 1894, that whilst the consumers' means were straitened, the demand for cheaper foreign goods increased.

The Amount of the Trade under discussion.

The returns* included in this paper do not in the aggregate give a complete view of the British and foreign trade of the Empire. Mr. Chamberlain's despatch required the return of those articles only of which the total importation in each Colony was substantial (not less than 500*l.*), and of which at the same time the foreign importation exceeded 5 per cent. of the total importation of the commodity. The totals of the figures so returned in each case are summarised in the annexed table, which, however, as will presently appear, must be read with caution.

Country.	1884.		1889.		1894.	
	Total value affected.	Foreign Imports.	Total value affected.	Foreign Imports.	Total value affected.	Foreign Imports.
Canada	13,709,417	6,610,917	14,298,579	7,099,740	13,739,332	7,434,507
Newfoundland	1,093,075	423,617	877,362	312,468	966,963	208,575
Bermuda	138,371	95,092	155,627	107,123	158,616	105,190
Bahamas	61,642	51,360	69,899	58,707	68,365	38,588
British Honduras	204,716	90,142	206,376	93,046	160,371	84,797
Jamaica	1,884,052	726,823	1,411,551	466,159	1,422,039	388,602
Leeward Islands	275,985	93,435	251,093	84,681	226,200	76,193
Windward Islands	103,304	43,708	83,492	26,966	93,352	35,871
Barbados	567,344	389,323	599,858	384,791	776,890	518,843
Trinidad	930,837	367,804	723,518	280,119	894,084	345,921
British Guiana	* —	—	—	—	—	—
Gold Coast	427,842	246,126	319,552	70,274	571,692	157,167
Lagos	189,915	144,094	153,435	107,120	579,418	197,610
Sierra Leone	101,726	42,851	82,747	40,074	170,046	48,802
Gambia	102,944	28,669	75,571	22,721	80,685	24,398
Cape of Good Hope	395,280	61,551	705,617	150,018	2,287,027	438,486
Natal	170,125	31,141	1,518,122	204,713	654,997	120,266
Mauritius	2,469,293	771,942	† —	—	2,014,771	405,747
Ceylon	129,609	2,340	126,472	20,521	158,458	28,608
Straits Settlements	4,957,148	1,518,699	4,631,430	1,779,177	5,111,009	2,245,129
Hong Kong	‡ —	—	—	—	—	—
New South Wales	16,038,845	1,682,972	14,602,415	2,158,608	9,112,476	1,133,781
Victoria	6,691,941	526,069	9,379,679	1,048,003	4,111,459	517,233
South Australia	2,244,795	188,813	1,845,070	138,852	1,813,070	209,944
Queensland	461,660	40,704	1,037,910	147,302	632,657	83,934
Western Australia	15,591	12,019	46,344	18,183	147,081	75,572
Tasmania	1,656,117	§ —	1,611,035	—	1,094,457	—
New Zealand	2,247,611	197,177	1,695,299	228,313	1,784,773	262,065
Fiji	—	—	—	—	132,526	17,244
Malta	605,273	418,576	741,709	574,038	800,760	589,625
Cyprus	188,838	120,122	149,587	95,304	148,298	100,124
India	7,395,180	1,718,810	11,367,110	3,141,950	11,695,540	4,279,230

* No full return on the prescribed basis was received from British Guiana.
† No return for this year from Mauritius.
‡ Hong Kong is a free port, and no return can be given.
§ No goods appear in the Customs returns of Tasmania, as from foreign ports.

The aggregate value of the trade represented by these returns, excluding that for India, is found to be as follows:—

Goods in which Foreigners compete.	1884.	1889.	1894.
Value of imports from all sources	58,063,296	56,490,249	49,911,872
Value of imports from foreign countries	14,926,086	15,717,021	15,912,822
Percentage of foreign imports	25·71	27·82	31·88

* In one or two cases there seems to have been an error in including trade of a part of the British Empire in the column for foreign trade, *e.g.*, in the report from New South Wales, under "sugar" Mauritius appears as a foreign country.

The total value of the trade of the Colonies for the same years was :—

Total Trade.	1884.	1889.	1894.
Value of imports from all sources - -	138,026,251	152,287,064	139,804,345
Value of imports from foreign countries -	35,633,701	37,356,828	44,040,049
Percentage of foreign imports - -	25·79	24·57	31·50

It will, from a study of these tables, be found that the value of the imports affected by foreign competition (as limited by Mr. Chamberlain's despatch) is on the average 38 per cent. of the total imports into the Colonies,* that is to say, the returns under special consideration represent more than one-third of all Colonial trade. The conclusions to be drawn from them are therefore on a sufficiently broad basis to permit of their being received with some confidence.

The average value of the import trade of the Colonies for the three years around each of the years taken in Mr. Chamberlain's despatch will be seen from the following table†: —

Year.	Colonial Imports from			Total Imports.
	United Kingdom.	British Possessions.	Foreign Countries.	
1883 - - - -	65,409,431	38,792,372	35,800,895	140,002,698
1884 - - -	63,192,030	39,200,520	35,633,701	138,026,251
1885 - - - -	59,473,814	39,256,638	37,038,169	135,768,621
Average - -	62,691,758	39,083,173	36,157,588	137,599,190
1888 - - - -	58,864,266	44,111,188	36,850,608	139,825,062
1889 - - -	64,454,681	50,475,555	37,356,828	152,287,064
1890 - - - -	60,059,488	48,269,167	39,742,573	148,071,228
Average - -	61,126,145	47,618,637	37,983,336	146,728,118
1893 - - - -	56,244,841	43,179,573	39,932,288	139,356,702
1894 - - - -	53,719,040	42,045,256	44,040,049	139,804,345
1895 - - - -	59,565,217	43,274,027	44,060,038	146,899,282
Average - -	56,509,699	42,832,952	42,677,458	142,020,110

From this it appears that the years adopted in the despatch on the whole fairly represent the average imports of the period. Cases of divergence require special inquiry. For instance, the year 1894 marks a greater drop in imports from the United Kingdom than the average of the years 1893–95, but this does not affect the general conclusion to be deduced; it largely rises from the depression in the Australian Colonies. But it may suggest the inquiry whether in a bad year there is a tendency to buy cheaper goods, and therefore to give more custom to the nation which puts cheap goods on the market.

Percentage of Foreign Importations.

The figures recorded in the first of the above tables (p. 2) do not afford a perfectly secure basis for generalisation. They do not always, even in the same Colony, indicate precisely the same commodities in each period: for instance, under the Gold Coast the large proportion (57 per cent.) which the foreign imports bear to the total imports returned in 1884 is due to the inclusion of a large quantity of foreign spirit which does not occur again in the other years; and under Lagos the apparent great fall in the percentage (from 70 to 34 per cent.) of foreign goods between 1889 and 1894 is simply due to the fact that in 1894, for the first time, cotton manufactures with a large total importation and comparatively small foreign proportion appear among the goods returned.

* The imports into India similarly affected are about 20 per cent. of the total imports.

† The figures in this table for the two later triennial periods are taken from the general comparative table in the Colonial Office List; for the earlier period they are worked up in detail from the Colonial Blue Books or Statistical Returns.

The table does, however, show—

(1.) That the proportion of foreign to total importation in goods in which competition exists varies from about 8 per cent., as in Victoria and Queensland in 1884, to more than 80 per cent., as in the Bahamas, the highest proportions being in Colonies connected by geographical position with some foreign country.

(2.) That in some cases it remains pretty constant throughout the period; that in others, as Newfoundland and Jamaica, it shows a tendency to decrease; in others, such as Cape Colony and the principal Australian Colonies, there is a slight but steady tendency to increase.

It is remarkable that the aggregate value of the foreign imports included in the table (which might be expected, *prima facie* to amount to a large percentage of the total foreign importation), does not bear a very much higher proportion to the aggregate value of the goods supposed to be affected (31·88 in 1894, *see* p. 2 *ad finem*) than the total value of foreign imports bears to the total value of the imports from all sources (31·50 in 1894, *see* p. 3 *ad init*). This point is at first sight somewhat surprising. It may partly be accounted for by the variations in the returns already referred to, but it is chiefly the effect of the Australian figures. Excluding these, the proportion of foreign imports in the case of goods specially affected would be, for 1894, nearly 50 per cent. instead of about 31 per cent. The matter illustrates the care required in handling the statistics.

From the figures given in the third of the above tables it appears that the recorded value of foreign imports in the year 1894 was materially greater than the value in 1884 — that while the total imports of the Colonies increased in the decade by something over 1 per cent., the foreign imports increased by about 20 per cent. If the three years average be taken the figures are rather more favourable to British trade, giving a total increase of more than 3 per cent., and an increase in foreign imports of 18 per cent. Probably neither figures are quite normal.

But an examination of the reports which accompany the returns reveals a general opinion in the Colonies that the importation of foreign-made goods has increased in a much larger ratio than is shown by the returns, which notice only the port of shipment; while it is clear that in particular lines in certain Colonies there has been a rapid increase in the percentage of the imports from foreign sources of supply. The most striking case of divergence between the statistical returns and the report of the estimated proportion of foreign trade is found under Queensland, where the general percentage is shown as 13 per cent., while in 23 out of 64 articles returned the estimated actual percentage ranges from 50 per cent. to 90 per cent.

In particular classes of goods the foreigner now in some cases does more than 50 per cent. of a trade which a few years ago was admittedly British.

Thus, to take some of the leading instances, in the case of—

Cape Colony -	Carriages and Waggons	The United States have increased their trade about twenty-fold in the period under review, and instead of 20 per cent. hold more than 50 per cent.
Straits Settlements	Biscuits and Bread -	Germany has increased her trade five-fold in the period under review, and now has 50 per cent.
Hong Kong* -	Yellow Metal - -	Germany within 10 years has cut in and obtained 50 per cent. of the trade.
Victoria - -	Hammers - -	The United States now have 80 per cent.
Tasmania -	Implements of industry	The United States and Germany now have 66⅔ per cent.
New Zealand -	Musical Instruments -	Germany has obtained almost a monopoly of the trade.

In other cases the foreign manufacturer has practically ousted his British competitor; as for instance in Hong Kong in the wire trade, or in Malta, where in wrought iron the British trade is entirely lost to Belgium.

On the other hand, as in the Mauritius, a large increase of foreign importation in certain items may be accompanied by an actual decrease in the general proportion of foreign to British trade.

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* Hong Kong of course really represents to a large extent a centre of foreign trade, as it supplies a large area in China.

It has been suggested that foreign traders have not so much been actually cutting into the trade of their British competitors as getting the greater part of the annual increase of the Empire's trade. There is an element of truth in this: the new-comer has a better chance of catching the new customer, or of sharing in the new demand. The table contained in the Cape report at p. 240 is worth noticing in this connexion. To determine the point exactly would be a matter for a special report; it may suffice to say here that from the returns in this paper it would appear that no such line can be drawn: in some cases an old trade is stated to be leaving British hands, where it is apparent, side by side with that statement, that the greater push of the foreign agent enables him to get hold of the newly-opened establishments and so of a larger proportion of the annual increase of trade than the British merchant.

The occurrence of "spurts" in the trade of a particular country with different Colonies deserves a passing notice: there are several instances in these returns. The phenomenon is inseparable from any extensive review of a trade and has no special importance.

The Principal Countries competing.

As was anticipated by Mr. Chamberlain's despatch, it is recognised by all the reports that the statistics are no index to the country of origin of the goods imported. The observations on this head in the report for South Australia are specially worthy of notice.

It is the port of shipment that appears in customs returns as the country of exportation. Statistics show the course of trade, not the origin and destination of produce. The produce and manufactures of one foreign country frequently come to the Colonies through a different foreign country, or through the United Kingdom itself. Canadian goods appear as American, as in the Cape return of agricultural implements. The greater part of the trade of each Australian Colony appears in the return as carried on with the other Colonies of the group. The fact that Cape Town is the entrepôt for all South African trade makes it almost impossible to unravel the exact statistical facts as to the imports for the Colony itself. On the whole the work of going behind the returns and investigating the countries of origin has been so far effected in the annexed reports that the broad conclusions therein marshalled will give much information to the business man if they are not equally satisfactory to the statistician.

The countries which are most frequently mentioned in the returns as seriously competing with British goods are, without doubt, the United States and Germany; in some lines Belgium is an equally energetic competitor, but her scope appears to be more limited. In the East the competition of Japan is rapidly becoming the leading feature in the trade of that part of the Empire.

But it will not be forgotten that the competition is not all of the foreigner against the British trader; one foreign country is found displacing another in a particular line, and not unfrequently one part of the Empire competes with another.

The following table has been designed to summarise roughly the main facts which may be gathered from the returns not only as to the countries which compete in British markets, but also as to the chief commodities in which competition is fairly general, and the nature of the competition which the British trader has to meet in each case.

Commodity.	Nature of Displacement.	Displacing Country.	Instances of Markets affected.
Apparel and slops of various kinds.	Cheaper and more serviceable article. Low lines of goods well done.	Germany „ „ Germany and Japan Continent	Sierra Leone. New South Wales. Victoria. Straits Settlements. Malta.
Arms and Ammunition: Firearms	Competition of a cheap and showy article.	Belgium „ „ „ Germany	Ceylon. Straits Settlements. Victoria. South Australia. Lagos
Gunpowder	-	Continent Continent and America.	Hong Kong. South Australia.
Beer and Ale	The production of a lighter and more suitable drink.	Germany „ „ „ „ „ United States	British Honduras. Trinidad. Gold Coast. Sierra Leone. Straits Settlements. Cape Colony. Jamaica.

Commodity.	Nature of Displacement.	Displacing Country.	Instances of Markets affected.
CANDLES	Decidedly cheaper goods	Belgium	Hong Kong.
		"	New South Wales.
CEMENT	A finer grain, good quality, and lower price.	Germany	Eastern Colonies.
		"	South Australia.
CHEMICAL PRODUCTS	Better manufacture, apparently depending on more skilled knowledge.	Germany	New South Wales.
CLOCKS and WATCHES	Cheaper make, more attractive, more artistic, better-looking.	United States	Leeward Islands.
		"	South Australia.
		Germany and Japan	Straits Settlements.
		Germany	Cape Colony.
		Switzerland	Malta.
COTTON MANUFACTURES	Cheaper goods of more showy character; special lines; especially in Stockings and Hosiery.	Germany	Bahamas.
		"	Straits Settlements.
		United States	British Honduras.
		"	Windwards.
	Better cashmere	France	"
		Germany	Tasmania.
	Haberdashery	"	Sierra Leone.
		France	"
	Inferior hosiery	Germany	Straits Settlements.
		"	Malta.
	Stockings better suited to market	"	Hong Kong.
FURNITURE	Lighter and cheaper goods, quicker made.	Austria	West India Colonies.
		"	Ceylon.
		Austria and Germany	Cape Colony.
		United States	"
		Germany	Sierra Leone.
		"	Lagos.
		Continent generally	Malta.
GLASSWARE	Better and cheaper goods	Belgium and Germany	Straits Settlements.
		Belgium and France	Cape Colony.
		Belgium and Continent.	New South Wales.
Lamp Chimneys	"	United States	Victoria.
		Belgium	"
HARDWARE	The States have a better name. There is more trouble taken to give variety. Cheaper goods, better suited.	United States	Bahamas.
		Germany	Windwards.
		"	Sierra Leone.
		"	Malta.
Cutlery	Cheaper goods	"	Lagos.
		"	Straits Settlements.
		"	Malta.
IMPLEMENTS AND TOOLS OF INDUSTRY.	Cheaper tool with lower freight	Germany	Gold Coast.
	New patterns, more suitability	United States	Tasmania.
		Germany	"
	Effect of patents and advertising	United States	Trinidad.
		Germany	"
METALS:			
Iron and Steel	Cheaper price, and equally good or even better quality.	Germany	Straits Settlements.
		Belgium	"
Nails	" "	"	New South Wales.
		Germany	"
Wire Nails	" "	"	Hong Kong.
		Belgium	"
		United States	Cape Colony.
		Continent	New South Wales.
Wire	" "	Germany	Victoria.
		"	West Australia.
Yellow Metal	" "	"	Hong Kong.
PLATE AND PLATED WARE	Novelty of design	United States	Cape Colony.
WOOLLEN MANUFACTURES	Better designs in the finer goods. [Not much competition in heavier goods.]	Germany	Straits Settlements.
		Austria, Germany, and Belgium.	Cyprus.
		Germany	Tasmania.

Causes of Displacement of British Goods.

A.—General Considerations.

In proceeding to sum up the causes of the alleged displacement of British by foreign goods, where that actually takes place, it seems almost superfluous to refer to the fact that certain countries have natural advantages in the production of certain goods. It is, however, a point which will be found referred to in the returns, and it has been insisted on more particularly in observations made upon the collections of samples, to which reference is made in an Appendix to this Memorandum.

The geographical proximity of certain countries to parts of the Empire is a factor akin to natural advantages of production, and its full effect may be noticed in the returns. The most striking instances of this are the position of the United States as regards the West Indies and Newfoundland, and that of Japan with reference to the Eastern Colonies.

The Canadian Dominion is a natural competitor with the States, and in the case of Newfoundland has lately been ousting the Republic in certain products, but it has so far been unable to get a hold on the West Indian trade. The settling of trade in a certain channel counts for something and requires much push to overturn it. This fact is recognised in the Bermuda report by the observation that the trade had grown up with the States before Canada came into the field, and in the report from the Leeward Islands by the statement that Canadian fish come through the United States, because of "the better handling of the trade."

It is of primary necessity to be aware of local circumstances and of what may be called "the personal factors" of trade before investigating the facts of the trade of any given area. The following suggestive instances are ranged under the Colonies whose report mentions them.

Bermuda -	New York people settle there as a sanatorium.
Gambia - -	The number of French houses turns the trade into French channels.* (Yet the French imports are rather decreasing than increasing.)
Lagos - -	The number of German firms influence the trade.
Ceylon - - } Straits Settlements }	The increasing number of foreign firms is so considerable as to be a serious factor in determining the direction of trade.
Mauritius - -	France is our one competitor for fairly obvious historical reasons.
Cape Colony -	The increase of foreign population is alleged as a cause of increase of foreign imports.
South Australia -	German houses push German trade.
Cyprus - -	The trade in drugs and medicines goes to France because the young doctors for Cyprus are educated in France.

Causes of Displacement of British Goods.

B.—Merchandise Marks Act.

A considerable proportion of the apparent increase in foreign importations is attributed in most of the Colonies to the effect of the Merchandise Marks Act. The obligation to mark foreign goods with the name of the producing country has made Colonial customers aware that these goods were of foreign and not British make, and they have begun to ship them direct from foreign ports. Whether the direct importation of goods, which used to come through British ports, is an unmixed benefit, is open to question. Transit trade had its profits, and, so far as it has been diverted, these profits are lost to the British merchant. While the South Australian report indicates that the Act has conferred a distinct benefit on British producers in checking the entry of foreign imitations of British goods, there seem to be few, if any, cases where the knowledge that a given article is of foreign production has led the consumer to reject it and buy a British article of a similar kind.

Primarily, the displacement resulting from the operation of these Acts is apparent rather than real. But it is suggested that when a Colonial merchant goes to a foreign house for one particular brand of goods with which he is familiar, it saves him trouble to order other goods at the same time; and so other trade also goes away from the British merchant.

* It should be remembered that the real cause in this case is that the exports from the Gambia go mainly to France, and therefore determine almost *ipso facto* the country of origin of the imports.

The complaint made in the report from Victoria that some other Australian Colonies have not passed similar Acts seems to be outside the scope of the present inquiry.

Causes of Displacement of British Goods.

C.—Causes directly concerning the Manufacturer.

1. *Cheapness the Chief Factor.*

It is abundantly shown by all the returns that throughout the Empire the cause which principally operates to let in foreign goods is their greater cheapness. Whether it be the European immigrant in South Africa, the Asiatic, or the West Indian negro, all alike think more of paying a low price for the moment than of the quality and wear of the goods they are buying. In this respect they are not different from the masses of the population in this country. Settlers, however, in a new or rough country, owing to risk of loss and breakages by removal, are particularly induced to set up house-keeping with cheaper goods. And when a territory is not yet very flourishing, or when times are bad, as in Australia in 1894, cheaper goods have a clear advantage in the market.

Foreign manufacturers have been more alert than our own in taking advantage of these considerations. They have laid themselves out for supplying cheap goods. They get English patterns and imitate them at a lower price. In appearance the new article is very much what the customer has been used to; it seems to be only in rare cases that the loss of quality is appreciated. The report for Victoria, speaking of the Germans, says :—

"They are constantly bringing forward close imitations of the saleable goods in the market a little lower in quality and in price than the articles copied."

Several instances of displacement by cheap imitations will be found in the returns. For instance, in the memorandum annexed to the Hong Kong report, the following occurs :—

"The German goods were originally put on the market at a very much lower price than the English manufactured goods, and the consequence was that they got a great deal of business at first. Latterly the weights they have been giving for this broadcloth are not so good as formerly, whereas the British manufacturer has kept his weights and the same goods, and now the business is coming back to him. . . . The Germans will say that their cloth is identical with the English cloth . . . but when the samples arrive the German article is found to be inferior to the British."

This extract also shows that the consumer, after trying the product of the foreign manufacturer, will on occasion, having found out its defects, go back to the British goods. Very much the same is suggested in the remarks upon the competition of Japan contained in the report for the Straits Settlements.

It is suggested in some of the reports, and has been several times stated at the exhibitions of samples (cf., Appendix to Memorandum) that the cheap goods which compete with British goods are mere shoddy, and that it would suit neither the reputation nor the convenience of the British manufacturer to lower himself to such a class of production. In this there may be some truth, and it is after all for the British manufacturers and workmen, after consideration of all the circumstances indicated in these reports, to judge whether they will let this trade go past them.* At the same time it is suggested in the report from Victoria that British houses have damaged British prestige by finishing and stamping low-class foreign guns; and similarly in the report from South Australia that German tweed is sent into England and made up and exported as British manufacture.

On the other hand, cheapness is neither necessarily the determining factor in settling the course of trade, nor is it invariably associated with lower quality. The Bahamas report, referring more particularly to the United States, asserts that lower price is combined with better quality, which probably means better finish and appearance. More specific instances are given under—

Barbados	-	Where it is stated in regard both to carriages and furniture that the imports from the United States are not cheaper, but more suitable, and hold the market accordingly.
Trinidad	-	Where it is stated that the lamps of the United States, which are much sought after, are more expensive but better than British makes.
Gambia	-	Where it is stated that French cordage is dearer and better, and padlocks from France are both cheaper and better.

* This remark may suggest the answer that apart from existing manufactures there is still British capital and labour without employment. This is part of a larger argument.

Victoria	-	Where cotton tweeds from Germany and Austria are stated to be not only cheaper, but better in quality.
South Australia	-	Where it is stated that plate glass from Belgium is the most popular, and rather more costly.
Cyprus	-	Where it is stated that Swedish iron though dearer is the more generally used.

2. *Finish and Suitability of Goods.*

The finish of the goods which the foreign producer puts on the market is much greater than that of British goods. Finish is independent of quality, and the foreigner has the art of giving a good finish to a low-class commodity, while the British producer keeps "finish" for the better-class goods, and usually considers the cheap commodity good enough if it is rough. So far as the price allows him, the British manufacturer will always give additional quality before finish.

There are many instances in the returns. The "get-up" of German apparel of a cheap class is superior to anything conceived of by a British house (*see* report from South Australia under this head). The cheap firearms and sporting guns from Belgium are very different looking articles from the cheaper British guns. American tools have good finish, while the English have not (*see* remarks in report from Newfoundland).

The question of finish is really only part of the question of suiting the goods to the market, and here it is generally admitted that the foreigner is much more active and enterprising than his British competitor; it is in several cases suggested in the returns that the foreigner takes trouble to find out what is wanted, and he will carry out the wishes of a customer even to small details, such as stamping his name or initials on a piece of hollowware. The reputation of the British manufacturer is that he makes what he chooses, and if his Colonial customers reject it, takes no further trouble in the matter. As the Newfoundland report phrases it, "the English move along in the old rut." Positive instances of this "too conservative" attitude of the British manufacturer are given in some of the reports. In that for the Bahamas, it is stated that the merchants went to the United States for locks because the English would not meet them. In that from the Straits Settlements the following illustration occurs :—

"One of the most striking instances of this apathy was well shown when it was first thought a business could be created in the manufacture of *sarongs*, imitating the well-known *batek* made by hand in Java. British manufacturers would not attempt it, on such grounds as the unsuitability of looms and rollers for producing the requisite size, &c., and they were not prepared to introduce the special machinery necessary. Holland, Switzerland, and Germany at once responded, and a very remunerative trade was begun. A glance at the returns under cotton goods, sarongs, &c., will give a slight idea of what we have lost."

The Tasmanian report under "Paper other than hangings" has some very pertinent remarks on this head, and the South Australian reporter says that in the matter of iron wire the British were fully warned as to the necessity of taking some steps for securing their trade, but would take no trouble, and consequently lost almost the whole of it.

The answer of the British manufacturer would probably be that he can get other customers, and is content to supply them; but at the point where competition begins to outstrip the growth of the markets of the world this reply will become unsatisfactory.

It is noteworthy that the Trinidad report states that the Canadians are as bad as the manufacturers of the United Kingdom in their indifference to customers' demands.

3. *Packing.*

Closely allied to the previous grounds of the success of foreign producers is the question of packing, as to which there is a general consensus of opinion that our foreign competitors, and in particular perhaps the United States, take much more trouble than we do—

(*a*) so as to save space and therefore freight.
(*b*) so as to give greater security of transit.
(*c*) so as to give greater convenience and facility for distribution at the other end.
(*d*) so that goods look more attractive in the store.

The instances of the effect of one or other of these cases are numerous: the following may be cited:—

Commodity.	Operation of Special Style of Packing.	Colony under which it occurs.
Arms, &c.:—		
Cartridges	The British trade lost by refusing to pack 25 together instead of 100.	Victoria.
Butter	Denmark leads in importation simply through the packing.	Cape Colony.
Candles	"British makers absolutely decline to alter their system of packing to that adopted by Continental makers." They have practically lost the whole trade.	Hong Kong.
Carriages	The United States get trade by better packing	Cape Colony.
Chemicals	Bad packing tells against the success of the British goods.	Victoria.
Cotton manufactures:—		
Hosiery	Neat boxes and parcels come from the Continent	South Australia.
Earthen and china ware	The Continent packs better	South Australia.
	Defective packing in English goods caused a loss of trade.	Cyprus.
Glassware:—		
Lamp glasses	Loose packing and consequently higher freight turned the scale in favour of the United States.	Victoria.
Hardware:—		
Chisels	Neat boxes instead of paper took the trade to the United States.	Jamaica.
Metals:—		
Tacks	The British lost the trade by failing to pack in cardboard boxes instead of paper parcels.	Victoria.
Spirits:—		
Perfumed	The tasty boxes and bottles of the French merchants give them the trade.	Victoria.
Sugar	The preponderance of the French imports is entirely a question of packing.	Gambia.

In the matter of charges for packing, British goods, or at any rate those coming from the United Kingdom, are at a disadvantage. The Malta report states that British charges for packing are almost double those of the Continent. The Bahamas report notes that packing cases with goods from New York are not specifically charged for, those from the United Kingdom are. And in the case of South Australia it is stated that (*e.g.*, in packing chemicals) if better methods of packing were adopted by the British, a charge would be made for the accommodation.

Causes of Displacement of British Goods.

D.—Causes resting with the Trader.

1. *Greater adaptability to a Market.*

Of the causes of successful competition which are referable to trading pure and simple, the first seems to be the greater adaptability to his market which is a characteristic of the foreigner. His agent goes further into the country, he is ready to consult the wishes of the smallest man, and always on the look-out for new trade in articles, however small. A perusal of the report from Victoria will illustrate this point. The preponderance of advertisements of foreign firms in Australian papers is a striking verification of the statements in that report.

In certain cases (*e.g.*, the Supplementary Report for Straits Settlements, p. 312) it is denied that the foreigner really exploits the market with more zeal than the agent of the British merchant, but this denial is the exception.

2. *Terms of Business.*

Similarly and perhaps as a natural result of the effort to know the buyer personally, the foreigner is as a rule ready to give longer terms of credit, and he will give them to smaller people. In the case of Cyprus, for instance, it is said that English merchants do not give credit for cotton goods. This cause, however, is not a very well-marked one, nor is its operation far-reaching. It is merely auxiliary to other more potent factors.

3. *Freight.*

In discussing the question of freight no special attention need be directed to the case where proximity to the market gives a foreign country a decided advantage over part of the British Empire; as Japan is situated with regard to Hong Kong, or as the United States have a special position quâ the West Indies—*e.g.*, the freight from the Bahamas to New York is 16*s.*, to London, 30*s.* per ton; from Barbados to New York, 15*s.*, to London, 25*s.* to 50*s.* per ton.

There are many remarkable cases in the returns which bring up the question of freights for serious consideration. There is not material for analysing the effect of shipping subsidies on freight, an inquiry indeed which would be beyond the scope of this memorandum. Attention, however, is drawn to some of the more remarkable instances where the freight is against the British producer and in favour of his foreign rival. In some cases the freights which favour the latter are given by British vessels.

The instances selected are as follows :—

Sierra Leone -	There are lower rates to the United States than to the United Kingdom.
Gambia - -	The freight for bread, &c., viâ Marseilles is less than *viâ* London.
Straits Settlements	In an interesting passage in this report a striking instance of freight against London is given, affecting Scotch biscuits, which were in competition with a German manufacture.
Hong Kong -	As a result of the "Shipping Conference" the freight from— New York to Shanghai is 30*s.* per ton. New York to London 57*s.* 6*d.* per ton. It is also stated that Scottish firms were hampered by freights in regard to metals, and that the freight changed the trade in cement from England to Germany.
Cape Colony -	Freight was the main factor in letting in the United States. *e.g.*, 22*s.* 6*d.* per ton was charged for furniture from New York; 31*s.* 3*d.* to 33*s.* 9*d.* per ton for furniture from London.
Victoria - -	Freight for drapery *viâ* Marseilles, 35*s.* per ton; direct Orient line, 40*s.* to 60*s.* per ton; direct Aberdeen line, 30*s.* to 40*s.* per ton. The dead weight of filling-up cargo for Germany makes the continental trade. In cement Germany gets the trade solely by freight.

The New South Wales report, indeed, suggests that in some cases the competition for freights has caused British goods to be taken to foreign ports for shipment, and that British goods are thus entered in the returns as foreign, and apparently swell the amount of foreign importations.

On the other hand the South Australian report, going fully into subsidies and freights, and showing that foreign freights generally are the lower, concludes that prices are not materially affected; and the Queensland report suggests that shipping facilities are, as a rule, in favour of Great Britain and that the continental trade would increase with further facilities.

The allegations in the Straits Settlements Report that the port charges at London and Liverpool are excessive requires notice in connexion with any discussion of freights.

Causes of Displacement of British Goods.

E.—False Marking and Piracy of Trade Marks.

There is very little stress laid, in any of the reports, upon false marking or other fraudulent devices as a cause of displacement of British goods; there are certain cases referred to, *e.g.*, in the memorandum from Hong Kong and the report from New Zealand *ad finem*, but there is such general silence on the subject that it may be dismissed as a cause of effective competition.

In other words, the competition which British goods have to face is on the whole a fair one. It is, however, suggested rather than stated in some cases (*e.g.*, under Sierra Leone) that the foreign manufacturer sends good samples and fills up his orders with inferior stuff.

Effect of Silver Currency.

The fall in the gold price of silver is alleged in the Eastern Colonies as a cause of the relative falling-off in British trade. This suggestion is not accurate. Admitting that a silver-using community dealing with a gold country will find its capacity for purchasing curtailed, yet, as the principal competitors of the United Kingdom and the greater part of the Empire also employ a gold standard, it is clear that they must all

equally be affected, and that the suggested operation of the fall in silver is hardly a factor in competition. It is different as regards Japan so long as that country retains a silver standard.

Cases of Displacement of Foreign by British Goods.

There are certain very clear instances cited in the annexed returns where British goods have, within the last few years, either successfully held their own or have completely displaced foreign goods. The best instances will be found under—

Gambia	Sucatoon cloth	The French make practically driven from the market by the English.
Straits Settlements	Handkerchiefs (bordered and figured).	Glasgow holds its own against every effort, but Japan is trying to cut in.
Do.	Razors	Even in the lowest type Sheffield wares are preferred.
Hong Kong	India-rubber shoes	An old "Chop" or trade-mark preserves the British trade in this particular line.
Do.	Screws	Nettlefold holds the trade.
Cape Colony	Candles	British have ousted German candles.
Victoria	Brassware	Great Britain has displaced Austrian goods.
Fiji	Cocoa	Fry is beating Van Houten.
Do.	Fruits	Tasmania and New Zealand supersede Californian products.

Sometimes this is a matter of name or trade-mark and therefore of custom, but sometimes it is genuine quality of the article operating in spite of all other causes.

Equally interesting are the cases where British manufacturers are actually making successful efforts to regain a threatened or lost trade, *e.g.*—

Straits Settlements.	Apparel (singlets)	Nottingham has since 1889 been sending out excellent imitations of the German low-priced goods.
Victoria	Plate and plated ware	England regaining and holding the trade,

and it is stated generally in the Cape report that where the British producers imitate the American style of the goods which displace theirs, they are beginning to regain the market.

The report from Newfoundland shows a noteworthy gain on the part of the Canadian Dominion as against the United States in cheese and leather, the cause of which invites further inquiry.

General Conclusion as to the Competition.

Here and there in the returns observations and suggestions occur which usually refer only to particular trades or Colonies, and do not lend themselves to classification. Such are the remarks in the Gold Coast report as to the action of the English Salt Union, or those in the report from Victoria as to the opening for a low-priced sewing machine. It is impossible to record all in this introduction, which of necessity has dealt with the broader lessons to be learned by the British trader.

The main general conclusions which are to be drawn from these returns are as follows :—

1. In the best classes of goods and in the capacity to put the best possible article on a market which requires it, the British manufacturer (and this seems generally to mean the manufacturer from the United Kingdom) is still supreme.
2. There are certain exceptions to the above rule, chiefly in the case of machinery and tools of certain patterns, and in favour of the United States. Yet in these particular lines the Canadian manufacturer is often a successful competitor with those of the United States.
3. A great portion of the general Colonial market is not a market for the best class of goods, and in proportion as cheap and finished imitations of such goods can be put on the market, the trade will go away to the producers of such imitations. This, as shown above, is precisely where the foreign manufacturer is coming in.
4. There is some danger that where the trade goes to foreign competitors in the cheap goods just mentioned, a certain proportion of the better class of trade may also be diverted eventually.

C. ALEXANDER HARRIS.

July 1897.

APPENDIX TO MEMORANDUM.

Exhibitions of Samples.

The invitation embodied in Mr. Chamberlain's despatch to send samples illustrative of the foreign goods which were competing with British goods in Colonial markets, although not a part of the statistics, demands a brief reference.

Samples from certain of the West Indies, Victoria, Lagos, and Cyprus have already been exhibited in London and various provincial centres under the auspices of the Chambers of Commerce, and the exhibitions have attracted much attention. Fresh collections from other Colonies will shortly be available for the public. Eventually it may be arranged that a detailed report upon the samples should be prepared, giving the view of the manufacturer and trader in Great Britain to compare with the opinion of the Colonial merchant.

It is very evident, from the remarks informally submitted to the Secretary of State, that the exhibitions have proved instructive and suggestive. At the same time it is clear that the samples so far received are not always representative, and that there are many trades into which competition enters which have sent no samples at all; further that the prices attached to the samples need much more careful definition.

The following quotations contain opinions which will be read with interest as confirming in a marked degree from this side of the water the conclusions arrived at in various Colonies. These quotations have been classified under four heads, although many of them illustrate two or three of the headings.

(1.) *The Character of the Samples received.*

"What we are surprised at is that the demand for goods made of such rubbish can be maintained, as although the price is low, to the wearer they must be expensive."

"The first impression that they made upon my mind is that I should be sorry if British manufacturers turned out such stuff."

"I am fully convinced that the quality is such that no manufacturer of repute here would care to share in such a trade, and certainly I am not inclined to blame him. No doubt the establishment of factories for turning out 'shoddy' would increase the volume of British trade in some markets, but whether this would tend to the ultimate advantage and reputation of British industry is a debatable point."

"Most of the samples shown are of the very cheapest it is possible to make, and can only be made in the sweating dens of the East End or similar places where no stated wage exists."

"I must give it as my opinion that the saws are far inferior in style, durability, and finish to similar goods of English manufacture, and feel sure that goods of such quality would not be put on the market by an English house for their own reputation; this fact, in my estimation, is the true cause of our losing the market, combined with our higher scale of wage in English manufacture as compared with the foreign."

"Some of the specimens are doubtless inferior to British-made goods; but moleskin trousers at 1*s.* 8*d.* a pair, socks at 1*s.* 4*d.* a doz., fancy straw hats at 4*s.* 5*d.* a doz., iron spoons at 21*s.* 8*d.* per 100 doz., shirts at 17*s.* 6*d.* a doz., cotton trousers at 17*s.* 8*d.* a doz., and Swedish matches at 2*s.* 4*d.* a gross,—all of European make—also American 26-in. handsaws at 15*s.* a doz., are matters for serious reflection."

"The articles exposed which I am interested in—cutlery, electro-plate—are of such an inferior class that it is very doubtful if anything so poor is manufactured in this country, and the value is an item of little importance, so that I am of opinion we don't care who has this particular branch of business."

(2.) *The Nature of the Market to be supplied.*

"It is as in every other kind of merchandise where the labouring classes receive but small pay. They want goods agreeable to the eye and at low prices."

"English manufacturers do not consider that cheap and lower-class goods are saleable to the inhabitants of our Colonies, where generally people cannot afford to pay so much for their goods."

"I am bound to say that those samples amongst your collection which emanated from America commended themselves to me as the most suitable for the market under notice. I understand that the native does not as a rule use boots in everyday life, but regards them only as a fitting adornment for his periodical visits to the towns."

"I was glad to have the opportunity of examining the samples of straw hats of German manufacture from West Indian markets. I may say that this class of goods can be made in England at quite as low a price as those made in Germany, and we shall lay before our West Indian clients similar goods, though we do a good business with this market in straw hats of a very superior class both as regards style and texture, and our business with this Colony is done with a much more profitable article, but we are always ready to meet the requirements of all markets."

"It is a matter of common knowledge that only a very low-priced articles is saleable in wholesale quantities in the West Indian market; but I was hardly prepared to find such utter rubbish as was represented in your collection."

"It is the necessity for such climates of lightness and flexibility, points which English traditions combat and condemn, but of which the determined neglect has opened most of our Colonial markets to the productions of the Continent and America."

"Of course the articles now on show are good for the price, but will not compare with the uniform excellence of English-made goods. If buyers are satisfied, we must climb down to the foreign standard in order to enter the field successfully, and ship under more favourable terms; as this latter is an item to be considered, some energetic combination of this kind must take place to revive the industry we are interested in."

"The goods in our class inspected, viz., (furniture for) stays, show the demand for lighter and less shaped articles than are in demand for the home market, and the knowledge of the same through this collection is of use to us as manufacturers."

(3.) *Comparison of British and Foreign Samples.*

"When it comes to superior articles in the textile products we certainly hold our own in all markets. In the hardware lines, more especially sharp-edge tools, the Americans take the lead."

"I was impressed with the fact that there was an amount of style introduced into the very commonest goods which has not been aimed at in this country, and which I should consider the chief advantage which American makers have had to offer."

"I regret I can only give you my opinion of the American files; these I consider are quite equal to the majority of Sheffield make, both in finish and regularity of cutting, and in price a little lower than what I have been buying at."

"In the present exhibition I could not but observe the advantage of both American and German hardware over similar British manufactures, both in the lightness and neat finish of the article, and the neatness of the package, this more particularly in locks."

"The English manufacturer continues using his old machines and thereby gives the Spaniards the preference in most foreign markets. No wonder that they constantly increase their factories, and yet although some are working day and night they cannot supply half the demand made upon them. The production of hosiery in Spain is comparatively new, and before long Nottingham will certainly have lost most of their foreign trade in this special article, the more so as the Spanish productions, even in cheap undershirts of 3*s.* per doz., come out very perfect in make and appearance, whereas the cheaper Nottingham goods, for which cheap labour is employed, look, in comparison, like Whitechapel."

(4.) *Allegations of Supineness against British Manufacturers.*

"I think the accusation that the merchant does not adapt himself to the requirements of his customers unjust, and given the same conditions we can hold our own against Europe and North America."

"Through the supineness of English manufacturers years ago the American axes were allowed to supplant the English ones owing to their greater suitability to Colonial work, and they have gained such a firm footing in the Colonies that it is a difficult matter to oust them now."

"It would be folly for English manufacturers to suppose that they can monopolise the trade for high-class goods while the foreigner is content with the cheap grades. The English must compete for all classes of trade, and to do this they should be shown samples of good as well as cheap goods."

"Britannia metal spoons were made in large quantities, and the trade at one time was entirely in the hands of the Sheffield manufacturers, but in consequence of their obstinacy in refusing to draw an iron wire through the handle this trade has been entirely lost to this country."

"Again, the iron spoons are also articles which through the improved machinery used in Austria and Germany, have been taken away from England, and a large trade, principally with the East Indians, is chiefly carried on now *viâ* Trieste."

"If the English export trade has not improved these last few years as with some of our neighbours, the great fault lies with our manufacturers themselves, who do not take sufficient interest in studying the requirements of foreign markets."

"A great many manufacturers in my humble opinion are not sufficiently educated for the shipping trade, often producing goods very different to contracts, that afterwards they are amazed when differences are pointed out to them and goods sometimes rejected."

Despatch to Governors of Colonies on the Question of Trade with the United Kingdom.

My Lord,
Sir,

Downing Street, November 28, 1895.

I am impressed with the extreme importance of securing as large a share as possible of the mutual trade of the United Kingdom and the Colonies for British producers and manufacturers, whether located in the Colonies or in the United Kingdom.

2. In the first place, therefore, I wish to investigate thoroughly the extent to which in each of the Colonies foreign imports of any kind have displaced, or are displacing, similar British goods and the causes, of such displacement.

3. With this object, I take this opportunity of inviting the assistance of your Government in obtaining a return which will show for the years 1884, 1889, and 1894—

(*a.*) The value (if any) of all articles, specified in the classification annexed, imported into the Colony under your Government from any foreign country or countries, whenever (and only when) the value of any article so imported from any foreign country, or countries, was 5 per cent. or upwards of the total value of that article imported into the Colony from all sources, whether within or without the British Empire, and when the total value of that article imported was not less than 500*l.*

(*b.*) The reasons which may have in each case induced the colonial importer to prefer a foreign article to similar goods of British manufacture.

4. These reasons (which should take the shape of a report on each article, separately, of which the foreign import exceeded 5 per cent. of the whole import and of which the total value imported was not less than 500*l.*, as defined above) should be classified and discussed under one or other of the following heads :—

(*a.*) Price (delivered in the Colony) of the foreign article as compared with the British.

The term "price" is not intended to include the duty (if any) levied in a Colony; it is the ordinary price in bond, and this should be clearly understood in making the report.

But where it is found impossible to give any except the wholesale price (duty paid), this should be stated, and the exact amount of duty entering into the price should be given.

In treating of price, regard should be had to cost of transport, facility of communication with any given country, subsidies to shipping, special railway rates, bounties on export, terms of credit or payment given by British or foreign exporters, rates of discount, &c.

(*b.*) Quality and finish, as to which full particulars should be given.

(*c.*) Suitability of the goods for the market, their style or pattern.

In connexion with this, and in illustration of the reasons for the displacement of British goods of any class, it is important that patterns or specimens of the goods preferred should be sent home, unless the bulk is very great. This will be necessary chiefly in those cases where the difference cannot be fairly described in writing.

(*d.*) Difference of making up or packing, as to which full particulars should be given.

(*e.*) False marking, such as piracy of trade marks, false indications of origin, or false indications of weight, measure, size, or number.

(*f.*) Any other cause which may exist should, of course, be stated.

It sometimes happens that imports which actually come from foreign countries pass through Great Britain and are included in Colonial statistics as British. Where this is a matter of common knowledge I shall be obliged to you if you will treat of these imports under the headings embraced in this paragraph, notwithstanding the fact that they are not distinguished in the returns.

5. With a view to facilitating the return, I annex to this despatch a draft of the form under which the particulars above requested may be returned; a list of commodities which is intended, as far as possible, to secure uniformity in making the return; and a

schedule of instructions as to filling up the return, which I would beg you to commend to the attention of those on whom the preparation of the return may fall.

6. To select the best classification to guide your advisers in their investigations has been a task of some difficulty. Most Colonies have classifications of their own, usually admirable of their kind; but as they have been mainly compiled for the special tariff purposes of each Colony they differ considerably from one another, and do not afford a basis of classification generally applicable to all Colonies. I have, therefore, on the whole, thought it best to adopt the condensed classification used by the Board of Trade in the Annual Statistical Abstract for the exports of the United Kingdom. At the same time I suggest that those responsible in each Colony for furnishing the returns for which I am asking should expand their return under each chief heading by such detailed sub-heads as may be suggested either by the ordinary colonial returns, or by the course of trade in the particular Colony; and in this connexion I append a schedule of sub-divisions suggested by various Chambers of Commerce in this country.

7. I am further desirous of receiving from you a return of any products of the Colony under your Government which might advantageously be exported to the United Kingdom or other parts of the British Empire, but do not at present find a sufficient market there, with any information in regard to quality, price, or freight, which may be useful to British importers. I mention the matter here that you may be prepared with information; but I am contemplating the preparation of a further and fuller despatch on this branch of the subject.

8. I am well aware how much has been, and is being, done in this direction by the self-governing Colonies through the High Commissioner for Canada and through the Agents General, and also by the Imperial Institute, the Royal Colonial Institute, and other public bodies.

I am glad to have this opportunity of expressing my admiration for the excellence of this work; but in a matter of such importance, no additional efforts or opportunities of acquiring information can be superfluous.

9. I shall be glad to have these returns as soon as possible, and shall greatly appreciate your expedition in the matter.

I have the honour to be,
Your most obedient humble Servant,
J. CHAMBERLAIN.

ANNEXE I.

Form of Return.

Commodity.	Total Value of Importation.	Value of Importations from Foreign Countries.
	£	£
		a. France - -
		b. Germany -
		c. United States, &c., &c.
		Total - -

Numbered List of Commodities for use according to the Instructions (Annexe II.) in making the Return.

1. Alkali.
2. Animals, horses.
3. Apparel and slops.
4. Arms and ammunition :—
   - *a.* Firearms (small).
   - *b.* Gunpowder.
   - *c.* Of all other kinds.
5. Bags, empty.
6. Beer and ale.
7. Biscuit and bread.
8. Bleaching materials.
9. Books, printed.
10. Butter.
11. Candles of all sorts.
12. Caoutchoue, manufactures of.
13. Carriages and waggons, railway.

14. Cement.
15. Cheese.
16. Chemical products and dye-stuffs.
17. Clay, unmanufactured.
18. Clocks and watches.
19. Coals, &c.:—
    a. Coals, cinders, and fuel.
    b. Products of coal (except dyes).
20. Cordage and twine.
21. Corn:—
    a. Wheat.
    b. Wheat flour.
    c. Of other kinds.
22. Cotton yarn.
23. Cotton manufactures:—
    a. Piece goods, white or plain.
    „ „ printed, checked, or dyed.
    „ „ of mixed materials.
    b. Stockings and socks.
    c. Thread for sewing.
    d. Lace and patent net.
    e. Hosiery and small wares.
24. Earthen and china ware, including manufactures of clay.
25. Fish:—
    a. Herrings.
    b. Of other sorts.
26. Furniture, cabinet and upholstery wares.
27. Glass:—
    a. Plate, rough, or silvered.
    b. Flint.
    c. Common bottles.
    d. Of other sorts.
28. Grease, tallow, and animal fat.
29. Haberdashery and millinery.
30. Hardware and cutlery.
31. Hats of all sorts.
32. Implements and tools of industry.
33. Instruments and apparatus:—
    Surgical, anatomical, and scientific.
34. Leather:—
    a. Unwrought.
    b. Wrought, boot and shoes.
    c. „ of other sorts.
    d. Saddlery and harness.
35. Linen and jute yarn:—
    a. Linen yarn.
    b. Jute yarn.
36. Linen and jute manufactures:—
    a. Linen manufactures:—
    (*a.*) White or plain.
    (*b.*) Printed, checked, or dyed.
    (*c.*) Sailcloth and sails.
    (*d.*) Thread for sewing.
    (*e.*) Of other sorts.
    b. Jute manufactures.
37. Machinery:—
    (*a.*) Steam engines.
    (*b.*) Of other sorts.
38. Manure.
39. Medicines.
40. Metals:—
    a. Iron:—
    (*a.*) Old, for re-manufacture.
    (*b.*) Pig and puddled.
    (*c.*) Bar, angle, bolt, and rod.
    (*d.*) Railroad of all sorts.
    (*e.*) Wire.
    (*f.*) Hoops, sheets, and boiler plates.
    (*g.*) Tinned plates.
    (*h.*) Cast or wrought, and all other iron manufactures.
    (*i.*) Steel, unwrought.
    (*k.*) Manufactures of steel, or of steel and iron combined.
    b. Copper:—
    (*a.*) Unwrought:—
    Ingots, cakes, or slabs.
    (*b.*) Wrought or partly wrought:—
    Mixed or yellow metal.
    Of other sorts.
    c. Brass of all sorts.
    d. Lead, pig, sheet, and pipe.
    e. Tin, unwrought.
    f. Zinc, wrought and unwrought.
41. Musical instruments.
42. Oil and floor cloth.
43. Oil, seed.
44. Painters' colours and materials.
45. Paper (other than hangings).
46. Pickles, vinegar, and sauces.
47. Pictures.
48. Plate and plated ware.
49. Provisions, not otherwise described.
50. Rags and other materials for paper.
51. Salt.
52. Seeds of all sorts.
53. Silk, thrown, twist, and yarn.
54. Silk manufactures:—
    a. Broad piece goods.
    b. Of other kinds.
55. Skins and furs:—
    a. British.
    b. Foreign, British dressed.
56. Soap.
57. Spirits.
58. Stationery, other than paper.
59. Stones and slates:—
    Slate by tale.
60. Grindstones, millstones, and other sorts of stones.
61. Sugar, refined,
62. Telegraphic wire and apparatus.
63. Umbrellas and parasols.
64. Wood and timber manufactured:—
    Staves and empty casks and unenumerated.

65. Wool:—
  a. Sheep and lambs'.
  b. Flocks and rag wool.
  c. Foreign, dressed in the United Kingdom.
  d. Noils.
  e. Waste.
  f. Combed or carded and tops.
66. Woollen and worsted yarn.
67. Woollen and worsted manufactures:—
  a. Woollen tissues:—
    Heavy broad, all wool.
    „ „ mixed.
    Heavy narrow, all wool.
    „ „ mixed.
    Light broad, all wool.
    „ „ mixed.
67. Woollen and worsted manufactures—*cont.*
    Light narrow, all wool.
    „ „ mixed.
  b. Worsted coatings, broad, all wool.
    „ „ „ mixed.
    „ „ narrow, all wool.
    „ „ „ mixed.
  c. Flannels.
  d. Blankets.
  e. Worsted stuffs, &c., all wool.
    „ „ mixed.
  f. Carpets and druggets.
  g. Of all other sorts.
68. Yarn, alpaca, and mohair, and other sorts unenumerated.

ANNEXE II.

Instructions for filling up the Returns.

1. Each article in the classified list which comes within the description given in the despatch, *i.e.*, of which the importation from all foreign countries amounts to 5 per cent. of the total importation of the article (not being less than 500*l.*), should be included in the return.

Articles in the list which do not answer that description in the case of the returning Colony should be omitted.

It has been thought better to present the Board of Trade classification as a whole, although some of the articles enumerated in it are not likely to be part of the importations into many of the Colonies.

2. Each article returned should be returned with the number prefixed to it in the list.

3. The list is general in its headings, and in making up the returns under those headings the actual articles of trade coming under each heading should be distinguished by sub-heads (*a*), (*b*), (*c*), &c., &c., and by the general trade name under which the articles are sold in the returning Colony. These sub-heads will often be obtainable from the tariff classifications of the returning Colony; but, wherever possible, the principal merchants should be consulted, and the returns of commodities with the reports upon each should be elaborated in the light of their experience of the actual articles in demand in the Colony which are properly included under the general headings set down in the list.

4. The return of reasons, &c. should be made in respect of each commodity in order, with the "list" number and sub-head index-letter prefixed for facility of reference.

5. The return of reasons, &c. should deal with each of the headings mentioned in the despatch in respect of each article returned, that is to say:—

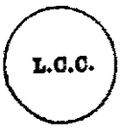
(*a.*) Price. (N.B. In the case of textile goods the "width" in inches should be given for each pattern.)
(*b.*) Quality.
(*c.*) Suitability.
(*d.*) Packing.
(*e.*) Other causes, in so far as they affect the choice of the article he uses by the consumer.

6. In sending home patterns, a large discretion is left to each Colony, but it is desirable to include everything within reason in which the foreign style and pattern is preferred, *e.g.*, spades, knives, tools; yarn and textile goods of every description; writing paper, &c.

Where patterns are sent, the fact should be recorded in the return; more than one pattern should, where possible, be sent, and each pattern should bear the "list"

number of the commodity it refers to, the name of the country of its origin, and of the Colony from which it is transmitted.

7. The packages containing patterns of all goods sent from the Colony under your Government in response to this despatch should be consigned to the Secretary, London Chamber of Commerce, Eastcheap, London, E.C., as that Chamber of Commerce has undertaken the duty of housing and distributing the samples in this country, and of carrying out any expressed wish of any Colony in regard to their subsequent distribution and ultimate disposition.

The cases containing these patterns should be marked 

ANNEXE III.

SCHEDULE of SUGGESTIONS made by the CHAMBERS OF COMMERCE for the better Sub-Division of the Headings in the List of Commodities.

No. of Heading in List.	Suggestions.
3.	Sub-divide as— (*a.*) Men's. (*b.*) Women's.
	After No. 9 add brushes.
16.	Make a separate head. Dyes:— (*a.*) Natural. (*b.*) Artificial.
19.	Add sub-heads:— (*c.*) Coke. (*d.*) Block or patent fuel.
23.	Add sub-heads before (*e.*):— Curtains. And instead of (*e*)— Hosiery. Shirts. Pants. Socks.
30.	Remove "cutlery" to separate head. Sub-divide "hardware" as— (*a.*) Files. (*b.*) Saws. (*c.*) Edge-tools. (*d.*) Engineers' tools. (*e.*) Hollow-ware. Or another suggestion, as— Brass-foundry. Chandeliers. Gas and water fittings. Bedsteads. Cycles, Needles. Fish-hooks. Pens. Buttons. Hollow-ware Chains. Tubes. Nails.
30.—*continued.*	Sub-division—*continued.* Screws. Tin-ware.
31.	Hats:— (*a.*) Straw. (*b.*) Other.
32.	Sub-divide— (*a.*) Spades, shovels, and forks. (*b.*) Miners' tools. (*c.*) Other tools. Or another suggestion:— (*a.*) Agricultural. (*b.*) Mining. (*c.*) All others.
37.	Substitute for (*b.*)— (*b.*) Textile machinery. (*c.*) Agricultural machinery. (*d.*) Mining machinery. (*e.*) Hydraulic machinery. (*f.*) Electric lighting machinery. (*g.*) Gas engines. Or another suggestion to make the heading— No. 37 Machinery:— (*a.*) Agricultural. (*b.*) Mining. (*c.*) Steam engines— Locomotive. All others. (*d.*) All other.
40.	Substitute for iron:— *a.* Iron or steel. (*a.*) Old, for re-manufacture. (*b.*) Pig and puddled bars.

No. of Heading in List.	Suggestions.
40.—*continued.*	
	b. Iron and steel—
	(*a.*) Bar, angle, bolt, and rod.
	(*b.*) Rails.
	(*c.*) Wheels, tyres, axles, &c.
	(*d.*) Hoops, sheets, and plates.
	(*e.*) Galvanised corrugated sheets.
	(*f.*) Tinned plates.
	(*g.*) Castings.
	(*h.*) Wire.
	(*i.*) Unrought.
	c. Manufactures of iron and steel combined.
	Another suggestion to distinguish "steel railroad" of all sorts.
	And after "tin, unwrought," add "tin alloys, such as solder, pewter," &c.
45.	Sub-divide into—
	(*a.*) Printing.
	(*b.*) Hangings.
	(*c.*) Writing.
48.	Substitute—
	Plate and plated goods:
	(*a.*) Silver ware.
	(*b.*) Plated ware.
	(*c.*) Britannia-metal ware.
	And add:—
	(*d.*) Jewellery and personal ornaments.
51.	Sub-divide into:—
	(*a.*) Refined.
	(*b.*) Rock.
54.	Add to sub-divisions:—
	(*c.*) Lace and nets.
57.	Specify sub-heads:—
	Whisky, &c.
62.	Amend by inserting "telephonic" after "telegraphic."
Between 62 and 63.	Add a head:—
	Tiles—
	(*a.*) For flooring.
	(*b.*) Glazed and decorated.
67.	Sub-divide according to the rather fuller table in the "Annual Statement of Trade."

Note—Suggestion made by Agent-General for South Australia to add (between 63 and 64) Wine.

CANADA.

No. 1.

THE EARL OF ABERDEEN to MR. CHAMBERLAIN.

(Received July 7, 1897.)

SIR, Ottawa, June 21, 1897.

IN reply to your despatch of the 28th November 1895, requesting to be furnished with a return of certain statistics in regard to the trade of Canada, I have the honour to forward herewith copy of an approved Minute of the Privy Council submitting a Report of the Minister of Trade and Commerce in regard to the matter to which are annexed returns supplying the information desired.

I have, &c.
ABERDEEN.

Enclosure in No. 1.

EXTRACT from a REPORT of the COMMITTEE of the HONOURABLE the PRIVY COUNCIL, approved by HIS EXCELLENCY on the 7th JUNE 1897.

THE Committee of the Privy Council have had under consideration despatches hereto attached, with relative attaches, from the Right Honourable the Secretary of State for the Colonies, of dates respectively 28th November 1895 and 31st December 1895, and from the High Commissioner for Canada, dated 3rd January 1896, calling attention to the importance of securing as large a share as possible of the mutual trade of the United Kingdom and the Colonies for British producers and manufacturers, whether located in the Colonies or in the United Kingdom, and asking for returns for the years 1884, 1889, and 1894, showing—

1. The value, if any, of all articles, specified in the classification annexed, imported into the Colony from any foreign country or countries, whenever (and only when) the value of any article so imported from any foreign country or countries, was 5 per cent., or upwards of the total value of that article imported into the Colony from all sources, whether within or without the British Empire, and when the total value of that article imported was not less than 500*l*.
2. The reasons which may have in each case induced the Colonial importer to prefer a foreign article to similar goods of British manufacture.
3. Prices (delivered in the Colony) of the foreign article as compared with the British.
4. Quality and finish.
5. Suitability of the goods for the market, their style or pattern.
6. Difference of making up or packing.
7. False marking, such as piracy of trade marks, false indications of origin, or false indications of weight, measure, size, or number, &c.
8. Other causes which may exist. Such return to be reduced to the classification attached to the despatch, &c., &c.

The Minister of Trade and Commerce to whom the said despatches were referred submits a report hereto annexed dealing with the subjects therein referred to, and submitting a collection of returns in connexion therewith.

The Committee, on the recommendation of the Minister of Trade and Commerce, advise that your Excellency may be pleased to forward a certified copy of this Minute, together with the annexed returns, to the Right Honourable Her Majesty's Principal Secretary of State for the Colonies.

All which is respectfully submitted for your Excellency's approval.

JOHN J. MCGEE,
Clerk of the Privy Council.

Referring to P.C. references Nos. 1,198 J., 1,254 J., and 1,274 J., being copies of Despatches, with relative attaches, from the Right Honourable the Secretary of State for the Colonies, of dates respectively November 28th, 1895, December 31st, 1895, and January 3rd, 1896, to His Excellency the Governor-General, calling attention to the importance of securing as large a share as possible of the mutual trade of the United Kingdom and the Colonies for British producers and manufacturers, whether located in the colonies or in the United Kingdom, and asking for returns for the years 1884, 1889 and 1894, showing:—

1. The value, if any, of all articles, specified in the classification annexed, imported into the Colony under your Government from any foreign country, or countries, whenever (and only when) the value of any article so imported from any foreign country, or countries, was 5 per cent. or upwards of the total value of that article imported into the Colony from all sources, whether within or without the British Empire, and when the total value of that article imported was not less than 500*l.*
2. The reasons which may have in each case induced the colonial importer to prefer a foreign article to similar goods of British manufacture.
3. Price (delivered in the Colony) of the foreign article as compared with the British.
4. Quality and finish.
5. Suitability of the goods for the market, their style, or pattern.
6. Difference of making up or packing.
7. False marking, such as piracy of trade marks, false indications of origin, or false indications of weight, measure, size, or number, &c.
8. Other causes which may exist. Such return to be reduced to the classification attached to the Despatch, &c., &c.

The undersigned Minister of Trade and Commerce in reporting thereon has to express regret at the long delay since the receipt of the references in question, and to point out the impossibility of a strict compliance with the terms of the various requests referred to. The statistics of the country have been kept under an entirely different classification, such classifications as are absolutely necessary under the terms of the various tariffs from time to time in force, and which vary materially from that under which the return is called for, and which seems to have been made up more to meet the requirements of a free trade country than one which must necessarily rely upon a revenue tariff.

An attempt was made to re-classify the items from the public statistics of the country, in order to work out the figures as nearly in compliance with the terms of the request as could be found practical to do, but after much labour it was found that the figures so derived did not in many cases give any definite information that would be of value in throwing light upon the problem advanced.

The figures, such as they are, are hereto attached. While the trade between Canada and the various countries from which she imports goods shows a large aggregate increase in 1894 over 1884, such increase has been to a certain extent general with them all, with the exception of the United States, which shows a slight falling off; the figures at the same time show the increased trade with the United Kingdom to have been greater than from any other country, yet there has been a larger percentage of increase from such countries as France, Germany, Italy, Holland, Belgium, China, and Japan than from the United Kingdom; but when one comes to examine the details under the classifications proposed, it is difficult to point to any items of importance wherein the increase has occurred, yet the aggregate figures show such increase, which unquestionably has arisen largely through the importation of such goods as small wares, and what would be termed in America *notions*, of which large quantities come principally from Germany and France.

The falling off in the importations from the United States in 1894 is exceptional, as both the years previous to and succeeding 1894 showed a very large increase.

This increase in the class of goods referred to has been brought about by persistent personal intercourse between the seller and the purchaser, the day having gone by when an extended trade can be built up and carried on by means of *a two-penny-half-penny postage stamp*. In so far as certain lines are concerned it is the customs of large dealers to keep their buyers in the European markets, where they purchase direct from the manufacturers; in other lines such is not the case, and even in the lines referred to it has become the custom for the manufacturer or the dealer in the foreign country to

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keep his sellers constantly on the move among the merchants whose requirements are not sufficient to keep their purchasers in Europe; these agents carry samples, and by personal intercourse convince the purchaser of the superiority of his goods and his ability to compete in prices with his competitors. This is almost the universal custom with dealers in the United States; it has largely become so with dealers in France and Germany, while but a few comparatively of the English dealers have adopted that course to any extent. The result is that they cannot compete, and are as a consequence losing trade they might in all probability secure if they took up-to-date means for doing so. There may possibly be to a certain extent another factor which should be taken into consideration in connection with the preference sometimes given in Canada to goods other than of British origin; it is the fact that the producers in other countries are more inclined to accede to the local prejudices of the consumers here in Canada, and to furnish goods of exactly the quality, and in exactly the form either best suited to the market or to the local prejudice; unfortunately the English dealer does not in all cases see his way to adopting this course, and still continues to manufacture his goods in styles unsuited to the popular taste.

A little more intimate personal intercourse between the vendor and buyer would, undoubtedly, conduce to a better understanding on this point, and to a change when necessary in the manner in which goods are put upon this market by the English vendor.

It cannot be always that his competitors' goods are of a superior quality, but so long as the style suits he has the advantage over the producer, who will persistently adhere to styles which will not suit the markets of the country.

With reference to the prices it is utterly impossible to give any idea of the prices of the innumerable classes of goods sold in Canada; such prices vary almost from day to day, and an article which may command a certain price to-day might not possibly command one-half that sum a month from now, or on the contrary it might command double the price. The same remarks must apply to freights respecting which no information given can be of any practical use, the rates varying almost from day to day according to the supply of or demand for tonnage. Shippers are sometimes willing to accept, for instance, 10s. per ton, while at other times upon the same goods they would demand 50 or 60 shillings.

The make-up or packing is a matter of importance, and the remarks above with reference to the requirements of the country are applicable thereto.

So far as false marking or false indications of origin are concerned, the attention of the Department has never been specially called thereto, and it is not probable that the trade suffers therefrom to any serious extent, but in this connection it may be remarked that the trade of the United Kingdom must unquestionably suffer from the operations of the "Merchandise Marks Act," which under its requirements in many instances advertises the foreign article instead of keeping it out of the market. Articles are frequently found upon the Canadian market, marked "Made in Germany" or "Made in France," or some other country as the case may be, which must have been so marked in order to admit them into the United Kingdom, from which they undoubtedly came to this country, and when such articles are found to be of superior quality, unquestionably a renewal order would require similar goods or goods made in the country indicated rather than in England. With reference to the country of origin the Canadian Customs requirements designate them far better than is done in the United Kingdom, for where the country of origin is known or shown at the time of entry they are passed through the books as having come from such country, but it is easy to see that in all cases the country of origin is not ascertainable on the entry of the goods. With reference to the suggestion that much of the information could be or should be procured through Chambers of Commerce, it may be pointed out that the Canadian Chambers of Commerce, or, as they are termed, Boards of Trade, have very little in common with those of the United Kingdom, that their suggestions would be almost exclusively from a local point of view, and therefore of little use as a whole. They are constituted for the purpose of advancing the trade in their immediate vicinities. They are very numerous, and while some of them are of sufficient importance to be of great advantage to the Government and to the mercantile community at large, yet such are the exception, and under the circumstances it was not thought advisable to attempt to procure information through such Boards.

With reference to paragraph 7 suggesting the return of any products of the Country which might advantageously be exported to the United Kingdom or any other part of the British Empire, but had not as yet found a sufficient market there, it may be said that there is no Canadian product which can be sold at its reasonable value in the

markets of Great Britain, but which is exported thereto. Unfortunately, it sometimes occurs that Canadian producers, under inducements held out from dealers in the United Kingdom and elsewhere, export goods with the expectation of a reasonable return therefor, but which are sold for less than their value for consumption in the home market. It would seemingly serve no good purpose to attempt to specifically indicate such articles.

There are many little things which operate against a free exchange of commodities between Canada and the United Kingdom, none of which, separately considered, are seemingly of much importance, but, taken in the aggregate, have a marked influence upon the trade, such, for instance, as the different systems of currencies, weights and measures, want of uniformity in local modes of dealing, &c., all of which are to a certain extent taken into account by the dealers in countries competing with the United Kingdom for the trade of this country. The German or the Frenchman will quote his prices in Canadian currency and in Canadian weights and measures, so that the purchaser knows exactly what he is doing. The English dealer is too apt to quote his prices in weights, measures, &c., used only locally—the same term having very different meanings when coming from different sections of Great Britain, as, for instance, the stone may mean one thing or it may mean another, according to the locality, and, again, according to the article quoted, and therefore is misleading to parties who are not perfectly familiar with the local customs of the various sections of the country and know exactly the meaning of the terms as applied to the quotation. A more clearly defined system, no matter what may be its basis, would unquestionably assist in the development of trade, and it seems possible that some scheme may be devised which would secure a uniformity in values of currencies and in weights, measures, &c., without any very serious disturbance of trade. People accustomed to a decimal system, as in America, have little patience in figuring out the intricacies of other systems.

The distribution of statistical information with reference to the trades of the two countries goes a long way towards the building up of trade, and unless there is some uniformity of classification much of the benefit to be derived from such statistics is lost, and seemingly one of the preliminary steps to be taken with a view to secure an increase of mutual trade would be a uniformity of classification, which should have reference to the necessary requirements of such tariffs as may be in force.

Again, there is a want of uniformity which seemingly could be easily rectified in the modes of computing values for duty which might with propriety receive the attention of the different Governments concerned.

The undersigned, in submitting the foregoing observations, does so as derived from the experience of officers who have been many years engaged in the administration of the Canadian Customs, and have had much experience in connection with the trade requirements of the country, and while sensible that this report deals but in a very cursory manner with the objects sought in the despatches referred to, submits the same with the recommendation that, if approved, His Excellency the Governor-General be moved to transmit the Minute of Council founded hereon to the Right Honourable the Colonial Secretary.

Department of Trade and Commerce,
Ottawa, May 21st, 1897.

R. J. CARTWRIGHT.

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1. ALKALI.

	1884.	1889.	1894.
Potash, nitrate of—saltpetre :—	$	$	$
Great Britain	19,950	2,649	3,662
United States	390	396	4,081
Germany	10,253	6,125	9,235
Holland	7,626	—	—
Other Countries	—	160	—
Total	38,219	9,330	16,978

1. ALKALI—*continued.*

	1884.	1889.	1894.
Soda, bicarbonate of:—	$	$	$
Great Britain	27,205	26,133	44,949
United States	1,544	2,110	1,737
Other Countries	—	15	4
Total	28,749	28,258	46,690
Soda, nitrate of, soda ash, soda caustic, sal soda, and silicate of soda (free, 1889):—			
Great Britain	201,128	204,974	241,803
United States	114,446	55,254	93,484
Other Countries	—	20	4,205
Total	315,574	260,248	339,492
Potash, muriate and bichromate of, crude (free, 1889):—			
Great Britain	35,898	16,730	15,290
United States	2,666	12,600	8,268
Germany	—	—	5,494
Other Countries	—	—	13
Total	38,564	29,330	29,065
Potash, other:—			
Great Britain	1,234	1,340	355
United States	462	2,547	716
Other Countries	—	—	8
Total	1,696	3,887	1,079

2. ANIMALS—HORSES.

Animals, horses (dutiable):—			
Great Britain	12,049	4,015	1,620
United States*	208,438	175,086	164,887
Other Countries	80	35	878
Total	220,567	179,136	167,385
Horses, for improvement of stock (free):—			
Great Britain	165,837	201,031	35,401
United States	117,748	254,227	163,208
France	12,000	2,200	—
Germany	—	—	1,800
Total	295,585	457,458	200,409

* In this item there is a large importation for simple re-exportation to other countries than Canada.

3. APPAREL AND SLOPS.

Apparel and Slops:—			
Linen clothing or articles worn by men, women, or children:—			
Great Britain	3,111	1,633	2,725
United States	1,246	615	332
Other Countries	—	518	316
Total	4,557	2,766	3,383

3. Apparel and Slops—*continued.*

	1884.	1889.	1894.
	$	$	$
Silk, ready-made clothing :—			
Great Britain	52,564	105,424	244,393
United States	7,404	5,285	7,497
France	1,480	426	6,008
Germany	1,167	5,266	10,742
China	1,400	4,591	2,343
Japan	—	2,919	11,368
Other Countries	—	161	387
Total	64,015	124,072	282,738
Shawls of silk :—			
Great Britain	2,020	967	99
Other Countries	51	158	494
Total	2,071	1,125	593
Shawls of wool :—			
Great Britain	223,832	181,018	108,529
United States	1,478	3,489	881
Germany	17,482	21,713	14,642
France	—	781	298
Other Countries	494	372	87
Total	243,286	207,373	123,887
Woollen clothing, ready-made, including socks and stockings, cloth caps and horse clothing :—			
Great Britain	915,871	1,361,682	1,200,416
United States	29,309	29,260	28,775
Germany	65,284	176,881	456,469
France	11,241	7,929	—
Austria	—	6,952	—
Other Countries	831	3,457	16,095
Total	1,022,536	1,586,161	1,701,755
Men's braces or susponders :—			
Great Britain	66,898	34,206	30,619
United States	31,451	13,283	24,359
France	2,472	1,446	1,418
Other Countries	612	607	98
Total	101,433	49,542	56,494
Women's Clothing, or other material, n.o.p. of cotton, including corsets, lace collars, similar articles made up by the seamstress or tailor, also tarpaulin, plain, or coated with oil, paint, tar or other composition :—			
Great Britain	221,712	209,035	147,014
United States	172,672	153,194	123,902
France	1,470	11,081	7,862
Germany	4,640	21,708	40,793
China	2,042	1,332	1,364
Other Countries	47	1,500	3,178
Austria	—	3,257	152
Total	402,583	402,010	324,260

4. ARMS and AMMUNITION.

	1884.	1889.	1894.
Fire-arms :—			
Muskets, rifles, and other fire-arms :—	$	$	$
Great Britain	49,515	43,757	33,885
United States	64,511	52,553	53,906
France	1,251	2,510	11,242
Germany	7,173	986	8,001
Belgium	4,860	28,621	19,291
Other Countries	749	20	352
Total	128,059	128,452	126,677
Gunpowder—all kinds :—			
Great Britain	15,188	21,898	4,166
United States	1,667	24,478	20,888
Total	16,855	46,376	25,054
Gun, rifle, and pistol cartridges, and cartridge cases :—			
Great Britain	5,872	5,771	10,690
United States	38,659	42,854	55,886
Other Countries	—	9	932
Total	44,531	48,634	67,508

5. BAGS, EMPTY.

Cotton seamless bags :—			
Great Britain	2,650	148	2,461
United States	14,028	21,367	17,468
Other Countries	13	9	50
Total	16,691	21,524	19,979
Cotton bags, made by use of needle :—			
Great Britain	583	55	113
United States	8,374	983	1,632
Other Countries	6	80	—
Total	8,963	1,118	1,745

6. BEER and ALE.

Ale and beer, in bottles :—			
Great Britain	165,957	115,475	100,063
United States	11,059	29,977	34,165
Other Countries	10	1,630	1,291
Total	177,026	147,082	135,519
Ale and beer, in casks :—			
Great Britain	40,574	27,566	16,943
United States	21,693	13,321	6,652
Other Countries	—	28	91
Total	62,267	40,915	23,686

7. BREAD and BISCUIT.

Bread and biscuit :—			
Great Britain	2,525	2,013	5,457
United States	19,604	25,303	11,065
Other Countries	16	52	474
Total	22,145	27,368	16,996

8. BLEACHING MATERIAL.

	1884.	1889.	1894.
Bleaching materials	Included under all other chemicals, No. 16.		

9. BOOKS, PRINTED.

	$	$	$
Books, periodicals, and pamphlets :—			
Great Britain	215,543	243,527	203,797
United States	387,194	433,092	370,564
France	36,631	55,949	43,256
Germany	608	2,582	2,798
Other Countries	656	874	1,030
Total	640,632	736,024	621,445
Bibles, prayer and hymn books :—			
Great Britain	81,308	88,450	85,145
United States	70,989	50,367	33,307
France	25,065	19,673	19,716
Germany	1,470	1,117	1,492
Belgium	2,208	5,531	3,847
Other Countries	491	489	574
Total	181,531	165,627	144,081

9A. BRUSHES OF ALL KINDS.

Brushes of all kinds :—			
Great Britain	30,584	24,213	17,982
United States	35,110	33,153	32,353
France	18,696	22,564	27,649
Germany	2,562	11,962	20,963
Japan	—	—	3,418
Austria	—	—	1,933
Other Countries	299	471	571
Total	87,251	92,363	104,869

10. BUTTER.

Butter :—			
Great Britain	687	431	1,305
United States*	111,180	143,818	150,544
Australasia	—	—	9,547
Total	111,867	144,249	161,396

* In this item there is a large importation for simple re-exportation to other countries than Canada.

11. CANDIES OF ALL SORTS.

Candies of all sorts :—			
Great Britain	27,718	49,968	31,539
United States	56,728	59,120	25,755
Italy	6,001	6,231	4,757
Switzerland	5,521	1,096	—
France	—	3,704	2,474
China	—	1,371	821
Other Countries	2,794	127	715
Total	98,762	121,617	66,061

12. CAOUTCHOUC, MANUFACTURES OF.

	1884.	1889.	1894.
	$	$	$
Boots and shoes:—			
Great Britain	264	10,255	143
United States	78,278	204,977	40,241
Germany	—	104	15
Other Countries	—	—	7
Total	78,542	215,336	40,406
Belting:—			
Great Britain	89	257	35
United States	54,517	22,706	11,288
Germany	—	—	64
Total	54,606	22,963	11,387
Hose and tubing:—			
Great Britain	989	2,630	495
United States	52,504	25,113	24,304
France	—	215	—
Germany	—	—	29
Total	53,493	27,958	24,828
All other manufactures of gutta-percha and india-rubber, N.E.S.:—			
Great Britain	91,432	60,669	30,019
United States	143,128	187,104	113,267
France	3,815	8,191	6,714
Germany	9,989	16,437	23,440
Other Countries	199	406	235
Total	248,563	272,807	173,675
Gutta-percha, crude, india-rubber manufactured and caoutchouc unmanufactured:—			
Great Britain	73	82,971	25
United States	404,431	638,098	199,297
Other Countries	—	41	9
Total	404,504	671,110	199,331
Rubber, hard crude in sheets plain or moulded:—			
Great Britain	26	38	1,337
United States	1,171	62,254	716,904
Other Countries	—	7	13
Total	1,197	62,299	718,254
Rubber clothing or clothing made water-proof with india-rubber:—			
Great Britain	147,357	246,622	241,007
United States	121,952	45,536	11,393
Other Countries	167	1,117	958
Total	269,476	293,275	253,358

13. CARRIAGES, RAILWAY.

Carriages and waggons, railway or freight carts, costing less than $50:—			
United States	—	193	159

13. Carriages, Railway—*continued.*

	1884.	1889.	1894.
Carriages and waggons, railway or freight carts, costing $50 and less than $100 :—	$	$	$
United States	—	55	125
Carriages and waggons, railway or freight carts, costing $100 and over :—			
United States	—	294	924
Railway passenger cars :—			
United States	175,451	212,130	4,075
Railway, tram, or horse :—			
United States	—	7,929	5,127
Railway, box, and flat cars :—			
Great Britain	—	—	85
United States	12,585	18,815	27,561
Totals	12,585	18,815	27,646
Grand Totals	188,036	239,416	38,056
Carriages and waggons, other :—			
Buggies of all kinds :—			
Great Britain	2,474	4,022	285
Other Countries	—	31	—
United States	27,038	18,314	11,543
Total	29,512	22,367	11,828
Farm waggons :—			
Great Britain	110	231	144
United States	36,473	10,614	5,475
Total	36,583	10,845	5,619
Pleasure carts or gigs, and similar vehicles :—			
Great Britain	1,159	88	1,115
United States	3,997	2,796	1,816
Other Countries	393	—	30
Total	5,549	2,884	2,961
Sleighs and cutters :—			
Great Britain	1,417	—	—
United States	8,661	10,849	3,862
Other Countries	—	—	18
Total	10,078	10,849	3,880
Wheelbarrows, hand-carts, bicycles, &c. :—			
Great Britain	24,451	12,182	218,532
United States	30,408	14,356	133,999
Germany	—	—	396
Total	54,859	26,538	352,927
Children's carriages of all kinds :—			
Great Britain	1,226	4	79
United States	21,895	8,977	1,965
Total	23,121	8,981	2,044

13. CARRIAGES, RAILWAY—*continued.*

	1884.	1889.	1894.
All other carriages, and parts of :—	$	$	$
Great Britain	2,719	6,722	21,876
United States	76,236	15,287	72,333
Germany	—	—	4,051
Other Countries	—	—	94
Total	78,955	22,009	98,354

14. CEMENT.

Hydraulic or water lime, ground :—			
Great Britain	—	2,635	—
United States	10,750	5,775	985
Other Countries	—	2	—
Total	10,750	8,412	985
Portland and Roman :—			
Great Britain	73,344	159,282	188,658
United States	15,392	2,595	29,789
Germany	3,094	14,080	2,466
Belgium	—	10,636	60,860
France	—	79	4,179
Other Countries	2,027	—	389
Total	93,857	186,672	286,341

15. CHEESE.

Cheese :—			
Great Britain	3,698	3,242	2,292
United States*	574,973	627,001	817,373
France	—	514	1,074
Other Countries	411	836	2,079
Total	579,082	631,593	822,818

* In this item there is a large importation for simple re-exportation to other countries than Canada.

16. CHEMICAL PRODUCTS and DYE-STUFFS.

Natural.—Chemical products :—			
Acids, acetic :—			
Great Britain	3,984	478	1,354
United States	4,140	7,181	479
France	1,657	4,115	—
Germany	7,900	14,818	7,395
Other Countries	1,420	712	—
Total	19,101	26,804	9,228
Acid, sulphuric :—			
Great Britain	105	51	94
United States	17,928	2,555	1,547
Other Countries	—	—	7
Total	18,033	2,606	1,648
Acid, sulphuric and nitric combined, and all mixed acids :—			
Great Britain	2	49	29
United States	67,484	10,892	7,281
Total	67,486	10,941	7,310

16. Chemical Products and Dye-Stuffs—*continued.*

	1884.	1889.	1894.
Natural.—chemical products—*continued.*			
Acids, all other N.E.S.:—	$	$	$
Great Britain	16,119	26,279	17,048
United States	11,832	18,708	27,868
Other Countries	—	39	813
France	6,821	—	369
Germany	712	2,264	6,117
Total	35,484	47,290	52,215
Ammonia, sulphate of:—			
Great Britain	429	1,218	3,790
United States	2,447	831	1,097
Other Countries	—	4	2
Total	2,876	2,053	4,889
Borax:—			
Great Britain	15,486	12,341	35,887
United States	15,674	5,108	2,303
Other Countries	—	12	—
France	—	—	322
Total	31,160	17,461	38,512
Cream of tartar:—			
Great Britain	57,683	94,392	36,997
United States	24,192	14,421	15,573
France	46,639	50,432	50,564
Total	128,514	159,245	103,134
Phosphorus:—			
Great Britain	9,058	7,960	8,308
United States	3,092	122	1,059
Total	12,150	8,082	9,367
Quinine, sulphate of, a powder:—			
Great Britain	27,923	12,115	7,565
United States	19,923	10,246	11,870
Germany	1,677	63	647
Other Countries	—	—	23
Total	49,523	22,424	20,105
Alum and aluminous cake:—			
Great Britain	17,329	16,538	11,572
United States	5,137	5,428	13,507
Germany	—	1,431	310
Belgium	—	—	304
Other Countries	—	—	109
Total	22,466	23,397	25,802
Chloride of lime:—			
Great Britain	36,846	68,685	43,977
United States	21,305	7,172	5,995
France	—	—	3,606
Other Countries	—	—	604
Total	58,151	75,857	54,162

16. CHEMICAL PRODUCTS AND DYE-STUFFS—*continued.*

	1884.	1889.	1894.
	$	$	$
All other chemical products, N.E.S.:—			
Great Britain	117,131	84,888	80,701
United States	181,524	64,653	68,527
China	—	166,178	190,484
Germany	17,420	1,917	18,044
France	4,208	2,508	2,172
Other Countries	516	1,043	5,798
Total	320,799	271,187	374,726
Aniline dyes in packages less than 1lb.:—			
Great Britain	64	8	—
United States	2,117	156	122
Germany	—	—	44
Total	2,181	164	166
Aniline dyes in packages 1 lb. and over:—			
Great Britain	23,729	17,315	29,185
United States	42,801	54,132	94,728
France	7,840	7,871	16,169
Germany	12,573	11,468	52,866
Switzerland	—	—	4,173
Other Countries	—	867	—
Total	86,943	91,653	197,121
Dye, jet black:—			
United States	2,898	29,630	—
Extract of logwood:—			
Great Britain	2,928	26,334	61,214
United States	32,786	45,608	91,017
France	—	—	1,588
Total	35,714	71,942	153,819
Indigo:—			
Great Britain	8,330	8,775	5,098
United States	41,504	38,741	52,511
Total	49,834	47,516	58,509
Berries for dyeing or used for composing dyes:—			
United States	2,958	—	82
Dyeing or tanning articles in a crude state, N.E.S. (used in dyeing or tanning):—			
Great Britain	28,011	38,545	27,535
United States	119,995	107,203	49,241
France	931	148	—
British West Indies	7,876	—	—
Italy	—	11,452	547
Germany	—	446	—
Other Countries	59	—	323
Total	156,872	157,794	77,646
Annatto, liquid or solid, and Annatto seed:—			
Great Britain	1,362	876	1,519
United States	7,182	5,530	5,068
Other Countries	—	—	59
Total	8,544	6,406	6,646

16. CHEMICAL PRODUCTS AND DYE-STUFFS—*continued.*

	1884.	1889.	1894.
	$	$	$
Cochineal:—			
Great Britain	1,054	69	71
United States	2,412	1,085	728
Total	3,466	1,154	799
Madder and munjeet or Indian madder ground or prepared, and all extracts of:—			
Great Britain	1,186	255	2,379
United States	1,876	5,191	1,244
Holland	1,146	—	—
Germany	581	—	—
Total	4,789	5,446	3,623
Blue vitriol:—			
Great Britain	11,477	17,777	4,109
United States	6,236	8,693	24,926
Other Countries	12	2	—
Total	17,725	26,472	29,035
All other dye-stuffs, N.E.S.:—			
Great Britain	3,984	3,973	3,845
United States	5,821	3,623	5,625
Other Countries	197	—	110
Total	10,002	7,596	9,580

17. CLAY.

Clay, manufactured:—			
Great Britain	9,542	26,383	33,544
United States	18,615	26,711	36,102
Other Countries	310	76	1,085
Total	28,467	53,170	70,731

18. CLOCKS AND WATCHES.

Clocks and watches, and parts of:—			
Great Britain	29,374	32,792	22,030
United States	466,994	570,804	354,776
France	22,496	16,071	16,487
Germany	4,099	3,483	13,783
Switzerland	165,069	82,190	62,233
Other Countries	189	587	364
Total	688,221	706,017	469,673

19. COAL, COKE, &c.

Anthracite, bituminous, &c.:—			
Great Britain	329,547	195,110	154,354
United States	7,434,567	8,436,426	9,615,450
Other Countries	—	2,456	201
Total	7,764,114	8,633,992	9,770,005

19. COAL, COKE, &c.—*continued.*

	1884.	1889.	1894.
Coke and gas coke :—	$	$	$
Great Britain	2,875	11,389	6,830
United States	42,246	89,531	169,472
Other Countries	—	—	—
Total	45,121	100,920	176,302
Coal tar and coal pitch :—			
Great Britain	518	5,812	15,521
United States	27,279	25,983	7,602
Total	27,792	31,795	23,123

20. CORDAGE AND TWINE.

Cordage and twine :—			
Great Britain	141,322	32,372	10,820
United States	378,224	79,387	60,221
France	3,208	—	6
Germany	4,567	699	—
Other Countries	846	208	221
Total	528,167	112,666	71,268

22. COTTON YARN.

Cotton yarn :—			
Great Britain	16,934	63,422	83,235
United States	13,155	10,668	8,054
Total	30,089	74,090	91,289
Knitting yarn, hosiery yarn, or other cotton yarn, not bleached, dyed, or coloured :—			
Great Britain	2,616	1,497	1,369
United States	3,668	2,918	4,085
Other Countries	—	15	733
Total	6,284	4,430	6,187
Knitting yarn, under No. 40, bleached, dyed, or coloured :—			
Great Britain	14,318	2,341	2,216
United States	9,487	4,496	3,174
Germany	—	—	890
Other Countries	—	201	192
Total	23,805	7,038	6,472

23. COTTON MANUFACTURES.

(a.) Piece Goods, Whole or Plain.

Bleached and unbleached sheetings, drills, ducks, &c., not stained, painted, or printed :—			
Great Britain	177,141	45,310	49,508
United States	357,685	107,612	98,071
Other Countries	326	924	404
Total	535,152	153,846	147,983

23. Cotton Manufactures—*continued.*

——	1884.	1889.	1894.
	$	$	$
Wadding, batting, batts and warps, and carpet warps not bleached, dyed, or coloured :—			
Great Britain	7,789	1,358	1,175
United States	27,861	1,187	5,200
Other Countries	—	—	106
Total	35,650	2,545	6,481
A. Piece goods, printed, dyed, checked, or coloured :—			
Ginghams or plaids, coloured or dyed :—			
Great Britain	28,506	53,156	18,503
United States	14,277	5,794	5,191
Germany	—	2,529	184
Switzerland	—	2,398	—
Other Countries	—	81	15
Total	42,783	63,958	23,893
Denims, drillings, bed-tickings, canton flannels, ducks and drills, dyed or coloured, checked and striped shirtings, cottonades, pantaloon stuffs, Kentucky jeans, &c. :—			
Great Britain	153,552	134,129	201,091
United States	153,104	59,058	57,629
Germany	—	—	7,937
Other Countries	265	313	1,059
Total	306,921	193,400	267,716
Printed or dyed cottons, N.E.S. :—			
Great Britain	1,612,861	1,534,884	1,287,001
United States	307,503	156,291	287,196
France	2,792	1,321	22,248
Germany	3,062	6,072	22,896
Switzerland	—	—	15,951
Other Countries	—	139	1,669
Total	1,926,218	1,698,707	1,636,961
Velveteens and cotton velvets :—			
Great Britain	396,101	69,456	262,284
United States	1,081	2,920	5,929
Germany	1,377	2,276	1,488
Other Countries	205	469	35
Total	398,764	75,121	269,736
A. Piece goods of mixed materials :—			
Coloured fabrics woven of dyed or coloured cotton yarn, or part jute and part cotton, or other material except silk :—			
Great Britain	—	108,333	99,603
United States	—	21,354	32,114
France	—	7,084	21,305
Germany	—	7,929	3,608
Other Countries	—	10	620
Total	—	144,710	157,250
Winceys, plain, of all widths when material is not over ¼ wool :—			
Great Britain	232,508	27,525	2,259
United States	728	1	—
Total	233,236	27,526	2,259

COTTON MANUFACTURES—*cont.*

	1884.	1889.	1894.
	$	$	$
Cotton manufactures, all other :—			
Bed quilts of cotton :—			
Great Britain	9,634	2,906	10,406
United States	9,707	1,364	2,144
Other Countries	395	189	510
Total	19,736	4,459	22,060
Wadding, batting, batts and warps, and carpet warps, bleached, dyed, or coloured :—			
Great Britain	3,247	902	762
United States	28,442	5,682	7,577
Germany	—	—	923
Other Countries	—	17	111
Total	31,649	6,601	9,373
Cotton and manufactures of all other sorts :—			
Great Britain	2,239,840	472,626	355,336
United States	352,564	121,952	136,988
France	20,085	14,479	7,274
Germany	12,871	6,637	2,169
Switzerland	4,758	417	3,075
Belgium	—	523	377
China	—	177	70
Other Countries	155	333	1,029
Total	2,630,273	617,144	506,318
C. Sewing Thread :—			
Sewing thread on spools :—			
Great Britain	349,810	288,203	210,760
United States	10,297	19,302	40,612
Germany	1,229	—	41
Belgium	—	1,837	122
Other Countries	4	190	471
Total	361,340	309,532	252,006
Sewing cotton thread, in hanks, black and bleached, three and six cords :—			
Great Britain	126,251	212,513	152,377
United States	105	851	1,162
Total	126,356	213,364	153,539
E. Hosiery and small wares :—			
Shirts and drawers woven or made on frames, and all cotton hosiery and knitted cloth :—			
Great Britain	215,193	88,977	55,153
United States	26,608	5,416	4,614
France	3,575	197	236
Germany	25,912	13,710	52,991
Other Countries	82	334	791
Total	271,370	108,634	113,785
Shawls :—			
Great Britain	5,650	3,544	264
United States	878	69	25
Other Countries	102	—	45
Total	6,630	3,613	334

23. Cotton Manufactures—*continued.*

	1884.	1889.	1894.
E. Hosiery and small wares—*continued.*	$	$	$
Handkerchiefs :—			
Great Britain	—	106,232	97,236
United States	—	2,342	1,005
France	—	172	194
Germany	—	—	1,288
Switzerland	—	—	3,055
Other Countries	—	1,137	191
Total	—	109,883	102,969

24.—Earthenware and China Ware including Manufactures of Clay.

Brown and coloured earthen and stone ware and Rockingham ware :—			
Great Britain	20,354	20,424	18,905
United States	13,540	8,515	3,460
Germany	3,215	—	1,550
Japan	—	411	1
Other Countries	430	197	177
Total	37,539	29,547	24,093
White granite or iron-stone ware and C.C. or cream-coloured ware :—			
Great Britain	338,124	262,635	218,615
United States	13,686	21,095	8,082
Germany	1,090	1,397	3,460
Other Countries	237	814	1,144
Total	353,137	285,941	231,601
China and Porcelain ware :—			
Great Britain	75,502	64,609	65,682
United States	10,347	12,242	20,160
France	17,213	9,488	32,645
Germany	44,908	61,930	98,600
Austria	—	6,933	6,366
China	—	1,334	684
Japan	—	10,130	9,911
Other Countries	1,693	290	262
Total	149,663	166,956	234,310

26.—Furniture, Cabinet, and Upholstery Wares.

Furniture, cabinet, and upholstery wares :—			
Great Britain	15,718	18,076	39,501
United States	187,967	264,184	222,939
Germany	1,637	1,932	7,094
Austria	—	1,982	130
China	—	1,055	1,235
Japan	—	2,331	1,565
France	—	—	3,345
Other Countries	1,281	952	1,180
Total	206,603	290,512	276,989

27. GLASS.

	1884.	1889.	1894.
Glass:—			
Plate, rough or silvered. Plate glass, silvered:—	$	$	$
Great Britain	6,847	1,451	1,604
United States	3,320	3,847	3,440
France	615	265	249
Germany	19,362	6,941	4,234
Belgium	3,476	3,186	798
Other Countries	—	6	303
Total	33,620	15,606	10,628
Plate glass, rough, in panes not over 30 square feet:—			
Great Britain	65,468	49,816	23,993
United States	1,660	497	885
Belgium	3,391	4,777	23,434
France	665	585	6,322
Germany	20,556	17,452	5,011
Other Countries	—	—	20
Total	91,740	73,127	59,165
Plate glass, rough, in panes over 30 and not over 70 square feet:—			
Great Britain	Included in previous item.	51,834	23,555
United States		460	1,716
Belgium		2,200	19,382
France		—	12,757
Germany		—	6,779
Total	—	53,994	64,189
Plate glass, rough, in panes over 70 square feet:			
Great Britain	Included in previous item.	75,394	37,844
Belgium		1,635	13,868
France		2	5,330
Germany		—	2,404
Other Countries		—	880
Total	—	77,031	60,126
Grand Total	125,360	219,848	194,108
Common and colourless window glass, coloured glass, not figured, painted, or engraved:—			
Great Britain	45,558	72,646	80,216
United States	18,591	4,433	7,029
France	2,484	14,623	2,697
Germany	14,358	6,842	34,487
Belgium	182,713	196,138	206,879
Other Countries	405	—	—
Total	264,110	294,682	331,308
Carboys, demijohns, bottles, and decanters, &c.:—			
Great Britain	86,027	26,134	22,215
United States	253,232	59,174	77,097
France	9,973	3,163	3,616
Germany	22,742	49,370	95,214
Belgium	2,119	663	2,289
Other Countries	1,566	241	334
Austria	—	3,225	2,337
Total	375,659	141,970	203,102

27. GLASS—*continued.*

	1884.	1889.	1894.
Glass—*continued.*			
Lamp and gaslight shades, lamps and lamp chimneys, &c.:—	$	$	$
Great Britain	10,642	10,128	14,299
United States	135,580	167,729	165,394
Germany	3,535	7,422	18,393
Austria	—	3,060	1,590
Other Countries	554	1,329	2,423
Total	150,311	189,668	202,099
All other sorts:—			
Great Britain	24,412	48,459	41,433
United States	31,155	215,341	33,412
Belgium	4,331	14,385	12,557
Germany	11,299	66,168	31,099
France	4,575	3,062	4,782
Austria	—	5,446	7,836
Other Countries	2,016	1,850	674
Total	77,788	354,711	131,793

28. GREASE, TALLOW, AND ANIMAL FAT.

Great Britain	4,369	1,208	8,292
United States	164,746	208,966	317,172
Other Countries	—	—	1,709
Total	169,115	210,174	327,173

29. HABERDASHERY AND MILLINERY.

Gloves and mitts of cotton, silk, woollen, or any other material except leather:—			
Great Britain	238,892	229,103	302,455
United States	10,751	17,433	33,467
Germany	40,735	66,791	167,047
France	—	16,406	149,638
Austria	—	15,173	5,166
Italy	—	12	2,214
Belgium	—	294	4,832
Other Countries	1,562	12	24
Total	291,940	345,234	664,843
Ribbons of silk:—			
Great Britain	331,824	512,733	456,015
United States	3,943	4,739	10,519
France	23,486	29,200	14,639
Germany	3,582	6,504	16,530
Switzerland	1,270	12,289	35,070
Other Countries	—	27	131
Total	364,105	565,492	532,904
Millinery:—			
Great Britain	7,446	11,670	2,213
United States	3,527	955	4,003
France	1,510	981	1,960
Other Countries	—	79	123
Germany	—	—	14,596
Total	12,483	13,685	22,895

29. HABERDASHERY AND MILLINERY—*continued.*

	1884.	1889.	1894.
Laces, braids, fringes, and other trimming :—	$	$	$
Great Britain	829,401	407,411	841,551
United States	73,019	95,998	92,875
France	30,135	21,805	43,084
Germany	50,925	63,864	115,462
Switzerland	11,154	3,380	11,102
Other Countries	26	176	72
Total	994,660	592,634	1,104,096

30. HARDWARE AND CUTLERY.

Bedsteads and other iron furniture :—			
Great Britain	9,303	17,568	—
United States	1,970	1,592	—
Total	11,273	19,160	—
Cast-iron gas, water, and soil pipes :—			
Great Britain	130,271	See cast-iron pipes of every description.	
United States	34,257		
Germany	1,495		
Total	166,023	—	—
Chains, cables, of any sort or size :—			
Great Britain	130,389	37,256	28,195
United States	8,601	11,309	9,504
Germany	2,172	—	—
Other Countries	216	183	325
Total	141,378	48,748	38,024
Builders', cabinet-makers', carriage makers', saddlers', and undertakers' materials :—			
Great Britain	72,200	54,506	42,611
United States	428,255	377,307	302,041
Germany	3,474	6,113	5,642
France	—	123	1,502
Other Countries	1,019	71	10
Total	504,948	439,220	351,806
Locks of all kinds :—			
Great Britain	10,876	9,767	10,835
United States	69,573	51,588	57,745
Germany	—	544	472
Other Countries	17	63	863
Total	80,466	61,962	69,915
Hollow ware, tinned, glazed, or enamelled :—			
Great Britain	25,186	978	17,112
United States	76,996	3,008	83,540
France	—	535	3,248
Germany	—	—	106,570
Other Countries	234	63	883
Total	102,416	4,584	211,353

30. Hardware and Cutlery—*continued.*

	1884.	1889.	1894.
	$	$	$
Nails, spikes, and sheathing nails composition :—			
Great Britain	6,152	5,205	909
United States	982	2,341	1,812
Other Countries	—	—	349
Total	7,134	7,546	3,070
Nails and spikes wrought and pressed, galvanized or not; horse shoe nails, hob nails, and wire nails and all other wrought-iron or steel nails, N.E.S. :—			
Great Britain	44,604	10,440	6,867
United States	13,257	11,987	15,685
Germany	1,600	55	—
Sweden	1,031	—	—
Other Countries	1,899	—	—
Total	62,391	22,482	22,552
Nails and spikes, cut :—			
Great Britain	462	1,101	1,091
United States	9,585	7,526	12,328
Other Countries	—	4	—
Total	10,047	8,631	13,419
Cut tacks :—			
Great Britain	1,355	578	198
United States	3,343	3,025	4,843
Other Countries	10	—	—
Total	4,708	3,603	5,041
Tubings :—			
Great Britain	200,425	235,690	126,950
United States	124,148	153,849	356,450
Belgium	1,126	3,210	8,345
Germany	35,221	56,689	48,018
Other Countries	152	—	—
Total	361,072	449,438	539,763
Tools and implements :—			
Great Britain	58,849	39,744	13,099
United States	31,017	41,000	51,042
Other Countries	90,600	734	382
Total	90,466	81,478	64,523
Carpenters', coopers', cabinet-makers and all other makers and all other mechanics' tools, N.E.S. :—			
Great Britain	53,911	43,305	44,353
United States	170,131	186,507	190,366
France	2,302	2,552	3,079
Germany	4,962	6,850	13,589
Other Countries	519	1,162	48
Total	231,825	240,376	251,435

CANADA.

30. HARDWARE AND CUTLERY—*continued.*

(a.) *Hardware.*

	1884.	1889.	1894.
	$	$	$
A. Axes of all kinds, adzes, hatchets and hammers, saws, picks, mattocks, sledges, track tools, wedges, &c. :—			
Great Britain	9,486	9,627	6,490
United States	77,164	92,830	89,511
France	—	1,612	785
Other Countries	748	128	294
Total	87,398	104,197	97,080
Safes and doors for safes and vaults:—			
Great Britain	25	13	—
United States	15,708	6,740	4,425
Other Countries	—	60	—
Total	15,733	6,813	4,425
Scales, balances and weighing beams:—			
Great Britain	2,409	1,677	1,062
United States	42,753	27,173	15,745
Germany	—	75	285
Other Countries	279	112	258
Total	45,441	29,037	17,450
Screws, iron and steel, commonly called "wood screws" :—			
Great Britain	33,806	105	21
United States	2,857	1,509	878
France	763	—	—
Germany	460	—	—
Total	37,886	1,614	899
Skates, iron or steel:—			
Great Britain	691	899	1,210
United States	4,704	164	409
Germany	909	677	602
Other Countries	—	21	1
Total	6,304	1,761	2,222
Stoves:—			
Great Britain	1,036	713	1,587
United States	46,392	17,155	41,781
Other Countries	—	—	79
Total	47,428	17,868	43,447
Tin ware and all manufactures of tin :—			
Great Britain	31,197	5,973	3,806
United States	131,493	85,143	28,823
France	2,403	444	484
Germany	9,888	917	1,556
Other Countries	403	163	155
Total	175,384	92,640	34,824

30. Hardware and Cutlery—*continued.*

	1884.	1889.	1894.
All other sorts :—	$	$	$
Great Britain	50,782	63,140	32,677
United States	30,620	250,069	108,307
France	—	—	1,416
Germany	—	9,040	5,511
Other Countries	210	1,301	359
Total	81,612	324,450	148,270

(b.) *Cutlery.*

Pen-knives, jack knives, and pocket knives of all kinds :—			
Great Britain	29,926	9,963	27,743
United States	1,255	354	2,607
Germany	5,283	706	18,195
France	—	—	2,331
Other Countries	7	1	—
Total	36,471	11,024	50,876
All other sorts :—			
Great Britain	236,501	259,509	178,888
United States	52,048	34,213	18,250
Germany	14,446	49,597	42,511
Belgium	—	2,337	852
France	—	—	1,203
Other Countries	1,471	489	178
Total	304,466	346,145	241,882

31. Hats of all Sorts.

Hats, caps, and bonnets :—			
Beaver, silk, or felt :—			
Great Britain	260,808	497,958	544,132
United States	348,828	265,788	156,081
France	9,446	4,115	14,095
Germany	—	—	1,160
Other Countries	680	653	79
Total	619,762	768,514	715,547
Straw, grass, chip, or other like material :—			
Great Britain	141,514	118,343	185,823
United States	170,923	232,396	104,987
France	4,355	7,252	4,414
Germany	—	3,599	—
Other Countries	2,711	311	—
Total	319,503	361,901	295,224
All other kinds :—			
Great Britain	107,456	86,144	126,334
United States	50,448	55,471	71,192
France	—	1,707	6,928
Germany	—	—	1,514
Other Countries	614	865	164
Total	158,518	143,687	206,132

CANADA.

32. IMPLEMENTS AND TOOLS OF INDUSTRY.

	1884.	1889.	1894.
	$	$	$
Agricultural tools :—			
Forks, hay, straw, manure, &c. :—			
Great Britain	67	124	657
United States	14,599	976	1,325
Other Countries	—	—	3
Total	14,666	1,100	1,985
Harrows :—			
Great Britain	146	—	26
United States	2,943	1,391	4,703
Total	3,089	1,391	4,729
Hoes :—			
Great Britain	50	402	120
United States	4,934	649	156
Total	4,984	1,051	276
Mowing machines :—			
Great Britain	—	123	—
United States	6,397	7,253	36,159
Total	6,397	7,376	36,159
Ploughs, sulkyand walking :—			
Great Britain	8,732	1,815	17
United States	25,897	58,734	11,158
Other Countries	—	—	23
Total	34,629	60,549	11,198
Rakes, hay, horse, and hand gardon rakes of any material :—			
Great Britain	783	26	9
United States	5,074	537	692
Other Countries	261	4	—
Total	6,118	567	701
Scythes :—			
Great Britain	7,048	4,289	4,259
United States	22,784	4,606	13,120
Total	29,832	8,895	17,379
Spades and shovels :—			
Great Britain	8,631	6,192	5,752
United States	36,507	8,006	8,253
Other Countries	114	1	—
Total	45,252	14,199	14,005
All other sorts :—			
Great Britain	1,923	12,749	1,633
United States	43,572	73,749	152,769
Other Countries	—	81	68
Total	45,495	86,579	154,470

33. Instruments and Apparatus.—Surgical, Anatomical, and Scientific.

	1884.	1889.	1894.
Surgical instruments :—	$	$	$
Great Britain	6,875	12,678	8.609
United States	5,558	11,578	25,596
Germany	—	1,083	10,020
France	—	1,851	1,379
Other Countries	909	132	—
Total	13,342	27,322	45,604
Optical instruments, including microscopes and telescopes, spectacles, eye-glasses, &c. :—			
Great Britain	23,277	18,287	16,762
United States	29,289	30,483	69,608
France	10,639	16,339	16,985
Germany	1,729	4,011	8,707
Other Countries	379	999	779
Total	65,313	70,119	112,841
Philosophical instruments and apparatus, including globes, &c., imported for the use of colleges and schools of science :—			
Great Britain	2,722	1,115	13,761
United States	5,578	7,731	13,891
France	909	1,674	2,010
Germany	1,175	3,174	7,530
Other Countries	—	10	39
Total	10,384	13,704	37,231

34. Leather.

(*a.*) Unwrought.

Sole leather and belting, leather tanned, undressed or dressed, but not waxed or glazed :—			
Great Britain	93,274	54,234	45,755
United States	34,627	227,779	114,847
Other Countries	2,943	415	98
Total	130,844	282,428	160,700
Sole leather and belting leather, tanned or dressed, waxed or glazed :—			
Great Britain	1,532	—	165
United States	1,649	3,968	3,620
Total	3,181	3,968	3,785
Upper leather, tanned or dressed, but not waxed or glazed :—			
Great Britain	1,859	10,943	674
United States	2,653	4,881	6,550
France	3,673	—	474
Other Countries	234	—	—
Total	8,419	15,924	7,698
Calf, kid, lamb, and sheep skins, tanned or dressed, but not waxed or glazed :—			
Great Britain	13,134	31,994	7,804
United States	18,395	30,365	23,377
France	9,301	—	2,295
British East Indies	—	3,402	—
Other Countries	3,135	1,872	278
Total	43,965	67,633	33,754

34. LEATHER—*continued.*

(*a.*) Unwrought—*continued.*

	1884.	1889.	1894.
	$	$	$
Calf, kid, lamb, and sheep skins, dressed and waxed and glazed:—			
Great Britain	18,273	9,365	12,315
United States	64,388	46,798	119,508
France	80,587	47,141	17,884
Germany	—	5,438	5,938
Other Countries	1,141	507	—
Total	164,389	109,249	155,645
Glove leathers, viz., buck, deer, and antelope, tanned or dressed, coloured or not coloured:—			
Great Britain	1,739	1,493	420
United States	23,277	40,830	36,329
Germany	—	—	7,112
Austria	—	—	2,844
Other Countries	1,280	—	422
Total	26,296	42,323	47,127
Upper leather, dressed, and waxed or glazed:—			
Great Britain	3,454	3,804	980
United States	8,598	2,590	8,617
France	12,483	—	2,640
Other Countries	387	534	308
Total	24,922	6,928	12,545
Japanned, patent, or enamelled leather:—			
Great Britain	535	87	643
United States	16,802	7,506	10,120
France	—	1,121	717
Germany	—	—	10,137
Other Countries	354	925	—
Total	17,691	9,639	21,617
Leather, and manufactures of:—			
Morocco skins, tanned, but rough or undressed:—			
Great Britain	10,534	3,269	1,118
United States	6,386	1,041	6,778
France	1,240	—	232
Other Countries	—	153	—
Total	18,160	4,463	8,128
All other leather and skins, tanned, N.E.S.:—			
Great Britain	58,680	39,994	21,080
United States	95,380	157,068	117,480
France	52,023	42,988	9,779
Germany	8,820	38,219	5,622
Other Countries	149	1,243	675
Total	215,052	279,512	154,636

(*b.*) Boots and Shoes.

Great Britain	19,860	18,875	14,019
United States	161,136	198,557	194,532
France	4,390	2,938	1,307
Germany	9,830	22,394	28,988
China	4,321	7,344	5,339
Austria	—	—	2,438
Other Countries	—	180	262
Total	199,537	250,288	246,885

34. LEATHER—*continued.*

(*c.*) Wrought, all other sorts.

	1884.	1889.	1894.
Leather, and manufactures of—*continued.*	$	$	$
Gloves and mitts of kid and leather :—			
Great Britain	230,766	179,274	*
United States	31,497	14,426	—
France	35,778	39,418	—
Germany	46,476	28,559	—
Austria	—	29,684	—
Other Countries	20	596	—
Total	344,537	291,957	—
Leather belting :—			
Great Britain	276	6,659	8,150
United States	36,532	12,362	6,144
Other Countries	—	—	33
Total	36,808	16,021	14,327
Leather, all other :—			
Great Britain	75,850	34,821	23,851
United States	71,801	69,579	52,162
France	2,024	1,785	1,725
Germany	11,701	968	916
Other Countries	1,486	382	589
Total	162,862	107,535	79,243

(*d.*) Harness and Saddlery.

Great Britain	5,742	5,156	5,792
United States	44,986	22,008	23,573
Other Countries	164	75	33
Total	50,892	27,239	29,398

35. LINEN AND JUTE YARN.

Linen and jute yarn, N.E.S.:—			
Great Britain	—	1,179	717
United States	—	942	—
Total	—	2,121	717

36. LINEN AND JUTE MANUFACTURES.

(a.) *Linen Manufactures.*

(*a.*) White or Plain. (*b.*) Printed, Checked, or Dyed.

Linen, flax, and jute manufactures :—			
Linen, duck, canvas, diapers, huckabacks, &c. :—			
Great Britain	722,137	405,719	393,045
United States	18,338	3,820	8,922
Germany	6,084	406	2,952
Belgium	3,175	6,726	2,905
Other Countries	242	1,397	890
Total	749,976	418,068	408,714

* Included in "gloves and mitts of all kinds," under item No. 3.

36. LINEN AND JUTE MANUFACTURES—*continued.*

	1884.	1889.	*1894.
Linen, flax, and jute manufactures—*continued.*			
Canvas, of flax or hemp used for boats' and ships' sails:—	$	$	$
Great Britain	27,512	10,953	4,703
United States	146	431	899
Other Countries	1,486	—	116
Total	29,144	11,384	5,218
Damask of linen or of cotton and linen, bleached or unbleached, or coloured:—			
Great Britain	—	203,005	211,142
United States	—	2,857	2,638
France	—	1,596	4,836
Germany	—	3,443	7,773
Other Countries	—	796	499
Total	—	211,697	226,388
Linens, brown or bleached:—			
Great Britain	176,026	93,508	73,538
United States	5,156	4,522	347
Other Countries	190	1,292	331
Total	181,372	99,322	74,216

(*e.*) Of other Sorts.

Linen, flax, jute, and manufactures of:—			
Towels:—			
Great Britain	—	201,827	154,090
United States	—	1,370	1,869
France	—	1,312	34
Germany	—	2,626	3,350
Other Countries	—	529	1,066
Total	—	207,664	161,009
All other manufactures of linen, flax, or jute:—			
Great Britain	88,201	124,842	162,403
United States	25,045	27,370	22,256
Germany	2,834	2,102	2,448
France	—	—	1,916
Other Countries	1,408	1,506	2,508
Total	117,488	155,820	191,531
Handkerchiefs, plain or printed or otherwise:—			
Great Britain	—	107,188	113,417
United States	—	524	1,188
France	—	92	157
Germany	—	262	3,751
Other Countries	—	—	1,403
Total	—	108,066	119,916
Linen thread:—			
D. Thread for sewing:—			
Great Britain	123,438	177,228	151,675
United States	1,296	671	3,770
Other Countries	31	20	499
Total	124,765	177,919	155,944

36. LINEN AND JUTE MANUFACTURES—*continued.*

(b.) *Jute Manufactures.*

	1884.	1889.	1894.
	$	$	$
Carpeting or matting and mats of hemp or jute :—			
Great Britain	118,651	88,151	71,842
United States	2,577	5,118	3,634
France	—	—	2,063
Other Countries	10	45	644
Total	121,238	93,314	78,183
Jute cloth as taken from the loom, neither pressed, maugled, calendered, nor in any way finished, &c. :—			
Great Britain	42,131	283,205	298,759
United States	2,833	—	54
Other Countries	5	—	—
Total	44,969	283,205	298,813

37. MACHINERY.

(*a.*) Engines, Steam.

Steam engines :—			
Great Britain	4,380	—	3,545
United States	29,618	25,974	10,734
Total	33,998	25,974	14,279
Engines, locomotive :—			
Great Britain	—	—	—
United States	414,220	171,089	64,345
Total	414,220	171,089	64,345

(*b.*) Of other Sorts.

Machinery :—			
Portable machinery, fanning mills, horse powers, and threshers, and separators, and saw-mills :—			
Great Britain	—	258	1,824
United States	31,243	50,514	22,896
Other Countries	36	—	121
Total	31,279	50,772	24,841
Sewing machines :—			
Great Britain	40,090	1,085	1,502
United States	194,633	115,943	80,384
Other Countries	219	48	—
Total	234,942	117,076	81,886
All other engines, machinery, wholly or partly made of iron :—			
Great Britain	290,013	309,858	319,588
United States	1,296,245	1,173,948	1,193,907
Germany	2,717	19,239	29,300
France	4,158	6,754	731
Denmark	—	1,400	—
Other Countries	2,242	679	669
Total	1,595,375	1,511,878	1,544,195

38. MANURE.

	1884.	1889.	1894.
Manures, fertilizers:—	$	$	$
Bone dust and bone ash for manufacture of phosphates, &c.:—			
Great Britain	—	49	—
United States	561	540	5,454
Total	561	589	5,454
Guano and other animal manures:—			
Great Britain	453	46	—
United States	2,902	620	872
Other Countries	—	—	30
Total	3,355	666	902
Kainite, or German potash salts, for fertilizers:—			
Great Britain	—	—	646
United States	564	1,561	996
Total	564	1,561	1,642
All other manures and fertilizers:—			
Great Britain	—	1,984	955
United States	—	12,170	16,514
Germany	236	—	—
Total	236	14,154	17,469

39. MEDICINE.

Patent medicines in liquid form:—			
Great Britain	3,285	5,812	4,805
United States	39,147	54,529	45,808
France	1,724	6,627	4,273
Other Countries	17	195	688
Total	44,173	67,163	55,574
Patent medicines, all other:—			
Great Britain	24,101	37,266	31,935
United States	74,566	93,670	95,812
France	2,695	7,794	7,110
China	1,609	2,207	1,091
Germany	—	—	1,367
Other Countries	—	260	656
Total	102,971	141,197	137,971

40. METALS.

(a.) *Iron.*

(*a.*) Old for Re-manufacture.

(a.) Wrought scrap iron and scrap steel, being waste or refuse wrought iron or steel, that has been used, and is fit only for re-manufacture:—			
Great Britain	—	320,242	331,501
United States	—	6,014	69,316
Germany	—	6,590	3,933
British West Indies	—	1,957	962
Other Countries	—	287	341
Total	—	335,090	406,053

40. METALS—*continued.*

(a.) *Iron*—continued.

(*b.*) Pig and Puddled.

	1884.	1889.	1894.
	$	$	$
B. Iron in pigs, iron kentledge, and cast scrap iron :—			
Great Britain	554,721	614,983	198,387
United States	228,415	266,542	311,647
Other Countries	184	—	607
Total	783,320	881,525	510,541
B. Iron, other, in slabs, blooms, loops or billets, puddled or not, and muck, &c. :—			
Great Britain	259,685	66,848	57,651
United States	4,360	—	223
Total	264,045	66,848	57,874

(*c.*) Bar, Angle, Bolt and Rod.

Bars, rolled or hammered, including flats, rounds, and squares, &c., N.E.S :—			
Great Britain	993,912	377,416	112,492
United States	50,307	25,866	52,030
Belgium	1,875	176	482
Norway and Sweden	21,975	594	1,286
Other Countries	—	—	1,761
Total	1,068,069	404,052	168,051
Rolled beams, channels and angle iron, and T-iron, structural shapes and special shapes, N.E.S. :—			
Great Britain	98,241	67,234	89,312
United States	27,357	21,500	31,542
Germany	6,535	24,914	40,589
Belgium	16,613	14,960	1,401
Other Countries	66	481	—
Total	148,812	129,089	161,844
Rolled iron or steel beams, girders, joists, angles, channels, eye-bar blanks made by the Kloman process and steel bridge plate, &c., N.E.S. :—			
Great Britain	No figures returnable.	92,014	48,959
United States		13,353	16,025
Belgium		1,031	4,830
Germany		5,702	9,147
Total	—	112,100	78,961
Bolts and washers and rivets, &c., N.E.S. :—			
Great Britain	22,107	18,398	3,366
United States	30,884	69,029	31,418
Other Countries	11	6	—
Total	53,002	87,433	34,784

CANADA.

40. METALS—*continued.*

(a.) *Iron*—continued.

(*d.*) Railroad of all sorts.

	1884.	1889.	1894.
Railway, bars, rails, of iron or steel for railways or tramways :—	$	$	$
Great Britain	874,618	1,828,423	1,856,793
United States	265,025	145,675	118,967
Belgium	—	—	23,052
Germany	—	—	19,841
Other Countries	—	—	80
Total	1,139,643	1,974,098	2,018,733
Railway fish plates, frogs, frog points, chairs and finger bars of iron or steel :—			
Great Britain	151,647	64,364	159,659
United States	439	2,181	8,822
Belgium	—	—	1,693
Germany	—	—	1,450
Total	152,086	66,545	171,624
Car wheels :—			
Great Britain	64,790		
United States	26,508	No figures returnable.	
Germany	20,107		
Total	111,405	—	—
Locomotive tires, of steel, in the rough :—			
Great Britain	21,927	38,108	318
United States	4,492	2,332	5,192
Germany	12,390	17,055	36,348
Other Countries	781	1,901	—
Total	89,590	59,396	41,858

(*e.*) Wire.

Metals, and manufactures of, iron and steel :—			
Wire of spring steel, coppered for the manufacture of mattresses :—			
Great Britain	11,118	21,368	4,390
United States	9,415	13,794	4,608
Germany	2,111	1,665	—
Belgium	1,974	925	—
Total	24,618	37,752	8,998
Wire of iron or steel, galvanised or tinned, or not, and of any gauge :—			
Great Britain	28,770	139,901	16,905
United States	32,976	52,480	70,293
Germany	4,333	56,847	2,506
Belgium	1,811	1,613	123
Norway	—	4,002	—
Other Countries	—	14	—
Total	67,890	254,857	89,827

40. METALS—*continued.*

(a.) *Iron*—continued.

(e.) Wire—*continued.*

	1884.	1889.	1894.
Metals, and manufactures of, iron and steel—*continued.*	$	$	$
Wire and wire rope of iron and steel, N.E.S. :—			
Great Britain	224,681	25,558	44,456
United States	111,879	108,972	165,669
Germany	23,992	3,077	30,972
Belgium	24,068	—	—
Other Countries	332	355	401
Total	384,952	137,962	241,498
Wire rigging for ships and vessels :—			
Great Britain	39,318	13,797	9,361
United States	613	2,052	723
Other Countries	45	—	—
Total	39,976	15,849	10,084

(f.) Hoops, sheets, and boiler plates.

Band or hoop, or scroll, or other iron, 8 m. or less in width, but of any gauge :—			
Great Britain	118,889	113,827	29,817
United States	9,991	12,611	19,080
Norway	518	—	—
Other Countries	—	831	81
Total	129,398	126,769	48,978
(f.) Sheet iron, common or black, smoothed or polished, and coated or galvanised, Canada plates and plates of iron or steel, &c. :—			
Great Britain	542,157	606,630	731,535
United States	26,933	38,382	49,472
Belgium	—	—	2,641
Russia	—	2,813	—
Other Countries	88	658	926
Total	569,178	643,483	784,574
Boiler plates :—			
Great Britain	186,210	60,188	65,031
United States	31,771	7,594	13,530
Germany	1,861	134	544
Norway and Swedon	—	—	1,868
Other Countries	277	—	86
Total	220,119	67,916	81,059

(g.) Tinned Plates.

G. Tinned Plates :—			
Great Britain	608,264	777,138	916,561
United States	37,254	94,718	40,252
Total	645,518	871,856	956,813

40. METALS—*continued.*

(a.) *Iron*—continued.

(*h.*) Cast or Wrought Iron, and all other Manufactures of.

	1884.	1889.	1894.
	$	$	$
Iron bridges and structural iron work :—			
Great Britain	101,405	34,031	—
United States	310,057	23,789	8,490
Belgium	20,161	8,765	—
Total	431,683	66,585	8,490
Castings of every description, N.E.S. and forgings :—			
Great Britain	43,956	208,434	48,556
United States	307,422	171,988	63,802
Belgium	—	6,224	—
Germany	—	1,282	—
Other Countries	804	859	147
Total	352,182	388,787	112,505
Anchors :—			
Great Britain	21,667	10,155	6,308
United States	4,090	4,100	3,217
Other Countries	36	325	101
Total	25,793	14,580	9,626
Malleable iron castings :—			
Great Britain	635	8,291	7,799
United States	37,730	61,177	42,507
Other Countries	—	228	145
Total	38,365	64,696	50,451
Pumps, iron pitcher spout, cistern, well, and force pumps :—			
Great Britain	902	591	4,580
United States	27,226	17,859	48,105
Other Countries	—	87	102
Total	28,128	18,537	52,787

(*i.*) Steel Unwrought.

Steel for the manufacture of rasps, files, &c., hammers, saws, and straw cutters and skates :—			
Great Britain	—	10,451	25,272
United States	—	5,257	69,591
Other Countries	—	—	221
Total	—	15,708	95,084
Steel bars, ingots, &c. :—			
Great Britain	302,359	437,251	203,088
United States	96,826	123,660	127,539
Germany	4,819	4,546	5,272
Other Countries	—	—	1,585
Total	404,004	565,457	337,484

40. METALS—*continued.*

(a.) *Iron*—continued.

(*k.*) Manufactures of Steel or of Steel and Iron combined.

	1884.	1889.	1894.
Coils and other springs:—	$	$	$
Great Britain	318	—	—
United States	15,156	—	—
Other Countries	10	—	—
Total	15,484	—	—
Whole or cut to shape, &c.:—			
Great Britain	74,251	16,996	15,761
United States	8,362	5,525	8,777
Other Countries	—	471	449
Total	82,613	22,992	24,987
Iron or steel, rolled round wire rods, under ¼ inch in diameter, imported by wire manufacturers for use in their factories:—			
Great Britain	5,803	146,290	277,878
United States	188	20,150	213,036
Belgium	—	58,018	17,997
Other Countries	—	579	1,872
Total	5,991	225,037	510,783
Steel and iron beams, sheets, plates, angles, and knees for iron or composite for ships and vessels:—			
Great Britain	1,472	71,556	3,421
United States	854	735	3,683
Total	2,326	72,291	7,104
All manufactures of steel and of iron and steel, N.O.P:—			
Great Britain	39,271	251,081	180,667
United States	60,174	527,699	504,793
France	1,860	2,860	6,391
Germany	45,005	55,239	46,907
Belgium	3,816	182	83
Other Countries	4	273	1,860
Total	150,130	837,334	740,701

(b.) *Copper.*

Bars, rods, bolts, ingots, and sheathing not planished or coated:—			
Great Britain	44,734	34,519	8,158
United States	27,337	73,265	84,919
Other Countries	—	17	15
Total	72,071	107,801	93,092
(*a.*) Old and scrap:—			
Great Britain	41	1,956	46
United States	722	586	309
British West Indies	1,343	36	1,227
Other Countries	979	200	305
Total	3,085	2,778	1,887

40. METALS—*continued.*

(b.) *Copper*—continued.

	1884.	1889.	1894.
	$	$	$
(*b.*) Copper in sheets :—			
Great Britain	60,278	64,396	63,672
United States	37,518	76,531	41,776
Other Countries	—	—	325
Total	97,796	140,927	105,773
(*b.*) Copper wire, flat or round :—			
Great Britain	3,017	10,021	1,276
United States	9,523	94,374	32,563
Germany	—	1,329	—
Other Countries	—	585	1
Total	12,540	106,309	33,840
(*b.*) Yellow metal in bars, bolts, and for sheathing :—			
Great Britain	135,133	85,985	32,689
United States	5,119	6,288	2,262
British West Indies	1,346	118	1,170
Germany	—	—	3,558
Other Countries	—	448	143
Total	141,598	92,839	39,822
(*b.*) All other kinds :—			
Great Britain	15,783	12,781	13,699
United States	31,143	33,192	40,453
Germany	2,224	—	747
China	1,739	1,416	--
Other Countries	31	191	1,565
Total	50,920	47,580	56,464

(c.) *Brass.*

Metals and minerals, and manufactures of—			
Brass, and manufactures of brass, old, scrap, and in sheets :—			
Great Britain	6,861	5,227	5,700
United States	22,761	34,478	42,704
British West Indies	1,938	136	369
Other Countries	1,269	751	805
Total	32,829	40,592	49,578
Seamless drawn tubing and plain and fancy tubing :—			
Great Britain	5,791	9,063	10,766
United States	12,211	17,509	15,906
Other Countries	—	—	46
Total	18,002	26,572	26,718
Bars and bolts :—			
Great Britain	284	229	143
United States	454	6,779	8,179
Total	738	7,008	8,322
Stripes for printers' rules, not finished :—			
Great Britain	336	331	59
United States	722	1,907	2,153
Total	1,058	2,238	2,212

40. Metals—*continued.*

(c.) *Brass*—continued.

	1884.	1889.	1894.
Metals and minerals, and manufactures of—*continued.*	$	$	$
Wire cloth:—			
Great Britain	3,888	6,301	5,622
United States	10,997	8,455	11,282
France	—	1,100	442
Other Countries	—	—	168
Total	14,885	15,856	17,514
Wire, of brass, round or flat:—			
Great Britain	11,338	13,600	1,751
United States	18,321	30,420	29,266
Other Countries	—	6	376
Total	29,659	44,026	31,393
All other manufactures of, N.E.S.:—			
Great Britain	68,945	72,423	43,838
United States	205,886	278,901	243,387
France	11,000	16,771	17,411
Germany	8,529	16,595	12,943
Other Countries	955	1,584	2,925
Total	295,315	386,274	320,504

(d.) *Lead.*

Metals and minerals, and manufactures of:—			
Lead, and manufacture of, old scrap and pig:—			
Great Britain	100,215	207,432	32,428
United States	1,393	5,560	114,745
Other Countries	442	61	143
Total	102,050	213,053	147,316
Bars, blocks and sheets:—			
Great Britain	27,282	40,577	19,174
United States	1,180	2,848	1,306
Total	28,462	43,425	20,480
Shot:—			
Great Britain	10,392	2,679	518
United States	268	217	213
Total	10,660	2,896	731
Nitrate and acetate of lead:—			
Great Britain	3,241	8,197	3,061
United States	6	876	42
Germany	—	—	2,148
Other Countries	315	3,569	—
Total	3,572	12,642	5,251
All other manufactures of:—			
Great Britain	11,285	6,290	10,224
United States	8,627	6,248	9,969
France	—	1,224	—
Germany	—	1,440	6,675
Other Countries	95	28	1,153
Total	20,007	15,230	28,021

40. METALS—*cont.*

(e.) *Unwrought.*

	1884.	1889.	1894.
Metals and minerals, and manufacture of:—	$	$	$
Tin, unwrought:—			
Tin, in blocks, pigs, and bars:—			
Great Britain	103,048	177,109	234,279
United States	74,963	75,784	34,518
Australasia	—	199	11,291
Total	178,011	253,092	280,088

(f.) *Zinc, wrought and unwrought.*

F. Zinc, wrought and unwrought:—			
Zinc, in blocks, pigs, and sheets:—			
Great Britain	18,721	32,832	40,247
United States	2,964	10,652	18,647
Germany	1,363	26,223	4,194
Belgium	54,259	12,028	29,050
France	—	—	3,551
Other Countries	66	2,200	—
Total	77,373	83,935	90,689
Seamless drawn tubing:—			
Great Britain	27	—	—
United States	417	76	—
Total	444	76	—
Spelter in blocks and pigs:—			
Great Britain	2,948	11,806	12,644
United States	2,059	4,509	18,532
Belgium	5,410	19,668	4,025
Germany	—	1,369	414
Other Countries	—	51	—
Total	10,417	37,403	35,615
All manufactures of, N.E.S.:—			
Great Britain	449	861	1,346
United States	10,592	6,218	4,671
Other Countries	467	78	50
Total	11,508	7,157	6,067

41. MUSICAL INSTRUMENTS.

Organs, cabinets and pipe, and parts of:—			
Great Britain	90	—	—
United States	51,015	31,396	17,756
Other Countries	—	485	36
Total	51,105	31,881	17,792
Pianofortes, and parts of:—			
Great Britain	15,976	7,415	1,742
United States	255,756	306,065	149,549
France	1,213	27,571	12,198
Germany	14,531	14,658	6,421
Other Countries	300	—	100
Total	287,776	355,709	170,010

41. MUSICAL INSTRUMENTS—*continued.*

	1884.	1889.	1894.
	$	$	$
All other musical instruments, N.E.S.:—			
Great Britain	21,886	13,937	8,279
United States	26,902	40,955	35,718
France	9,752	11,430	7,536
Germany	27,333	41,699	68,292
Other Countries	887	3,430	2,567
Total	86,760	111,451	122,392

42. OIL AND FLOOR CLOTH.

Oil cloth for floors, in the piece, cut or shaped, oiled, enamelled, stamped, painted or printed, flocked or coated:—			
Great Britain	93,130	131,088	128,500
United States	14,854	9,818	15,400
Germany	—	—	1,329
Total	107,984	140,906	145,229
Other, in the piece, cut or shaped, oiled, enamelled, stamped, painted or printed, flocked or coated:—			
Great Britain	19,645	22,365	49,388
United States	114,028	30,972	18,675
Other Countries	116	612	387
Total	133,789	53,949	68,450

43. OIL SEED.

Cotton seed oil, crude or refined:—			
Great Britain	—	—	376
United States	—	—	218,219
Total	—	—	218,595
Flaxseed and linseed oil, raw or boiled:—			
Great Britain	288,819	309,030	237,908
United States	13,082	5,627	15,513
Total	301,981	314,657	253,421
Sesame oil:—			
Great Britain	—	—	—
United States	425	—	18
China	—	42	16
Other Countries	38	—	—
Total	463	42	34

44. PAINTERS' COLOURS AND MATERIALS.

Paint, ground in oil or in any other liquid:—			
Great Britain	66,709	43,627	26,597
United States	71,241	54,134	39,583
Germany	—	2,814	2,272
France	—	—	1,197
Other Countries	1,278	880	48
Total	139,228	101,455	69,697

44. PAINTERS' COLOURS AND MATERIALS—*continued.*

	1884.	1889.	1894.
	$	$	$
Lamp-black and ivory-black :—			
Great Britain	413	972	1,342
United States	9,134	13,501	13,531
Germany	—	2,098	1,973
Other Countries	—	48	—
Total	9,547	16,619	16,846
White and red lead and orange mineral, dry :—			
Great Britain	128,620	179,464	161,553
United States	3,565	2,867	48,988
France	2,619	265	5,451
Germany	11,780	57,495	124,220
Belgium	15,888	27,145	18,889
Total	162,472	267,236	359,101
White lead in pulp, not mixed with oil :—			
Great Britain	1,351	2,909	411
United States	129	15	4
Germany	—	828	24
Other Countries	561	847	—
Total	2,041	4,599	439
Litharge :—			
Great Britain	17,959	27,796	15,752
United States	94	167	2,959
Germany	—	2,572	9,797
Other Countries	79	547	177
Total	18,132	31,082	28,685
Colours, dry :—			
Great Britain	2,164	3,850	15,352
United States	12,195	5,165	20,755
Germany	532	1,715	11,807
France	—	—	617
Other Countries	148	254	9
Total	15,039	10,984	48,540
Ultramarine blue :—			
Great Britain	3,050	3,058	3,847
United States	5,115	4,524	5,771
Germany	986	6,367	6,287
Other Countries	34	386	68
Total	9,185	14,335	15,973
Metallic colours, viz., cobalt, zinc, and tin :—			
Great Britain	—	125	906
United States	2,170	2,274	1,115
Other Countries	416	2	876
Total	2,586	2,401	2,897
Ochres, dry, ground or unground, washed or unwashed, not calcined :—			
Great Britain	2,893	7,518	11,231
United States	2,388	1,671	6,175
France	—	2,317	291
Germany	—	1,220	1,955
Other Countries	1,105	268	—
Total	6,386	12,994	19,652

44. PAINTERS' COLOURS AND MATERIALS—*continued.*

	1884.	1889.	1894.
	$	$	$
Paris green, dry:—			
Great Britain	9,881	30,092	25,185
United States	45,417	5,356	347
Germany	—	1,780	—
Other Countries	—	—	29
Total	55,298	37,228	25,561
Putty:—			
Great Britain	543	935	390
United States	1,564	1,116	2,261
Total	2,107	2,051	2,651
Zinc, dry white:—			
Great Britain	4,325	8,626	*
United States	4,167	2,692	—
Germany	1,485	10,872	—
Belgium	1,313	2,792	—
Total	11,290	24,982	—
Other paints and colours, N.E.S.:—			
Great Britain	35,522	38,874	3,357
United States	43,568	29,081	14,296
Germany	4,602	14,541	2,994
Belgium	1,112	661	—
Other Countries	358	550	263
Total	85,162	83,707	20,910

45. PAPER.

(a.) *Writing and Other.*

Paper and manufactures:—			
Writing:—			
Calendered paper including writing:—			
Great Britain	155,722	178,768	98,782
United States	97,906	59,194	47,151
France	1,371	452	402
Germany	—	1,174	1,367
Other Countries	122	563	184
Total	255,121	240,151	147,886
Envelopes, papier-mache, manufactured articles and wares of all paper, N.E.S.:—			
Great Britain	72,483	103,290	93,021
United States	163,206	287,948	246,245
France	9,081	4,905	7,970
Germany	34,888	35,964	33,466
China	2,873	2,339	1,691
Japan	—	1,498	2,884
Other Countries	330	1,450	1,736
Total	282,861	437,394	387,013

* Included in "Dry white and red lead, &c."

45. PAPER—*continued.*

	1884.	1889.	1894.
	$	$	$
All other sorts of paper and manufactures of :—			
Great Britain	45,200	93,551	82,285
United States	126,748	157,791	182,316
France	1,979	925	1,893
Germany	1,423	4,098	9,203
Belgium	—	4,610	1,800
Other Countries	146	1,239	937
Total	175,496	262,214	278,434

(b.) *Hangings.*

Paper and manufactures of—			
Hangings:—			
Hangings or wall paper and glazed, plated, marbled, enamelled or embossed paper in rolls or sheets :—			
Great Britain	71,592	12,922	6,633
United States	186,683	139,999	139,697
France	1,571	92	142
Germany	4,040	3	162
Belgium	1,088	—	—
Other Countries	2	—	441
Total	264,976	153,016	147,075

(c.) *Printing.*

Printing :—			
Printing paper :—			
Great Britain	17,051	18,931	24,179
United States	15,084	18,614	33,583
Other Countries	--	830	1,109
Total	32,135	38,175	58,871

46. PICKLES, VINEGAR, AND SAUCES.

Pickles, sauces and capers of all kinds, N.E.S. :—			
Great Britain	125,745	66,138	64,259
United States	34,057	3,913	6,245
China	2,276	403	236
France	—	880	175
Other Countries	350	87	40
Total	162,428	71,421	70,955
Vinegar :—			
Great Britain	6,187	7,139	7,127
United States	5,226	1,398	548
Germany	5,325	93	1,125
Other Countries	1,172	267	619
Total	17,910	8,897	9,419

47. PICTURES.

Posters and advertising pictures or pictorial show cards or illustrated advertising show cards, &c. :—			
Great Britain	2,912	30,755	25,594
United States	26,556	115,988	84,195
France	—	1,320	1,469
Germany	—	5,505	5,461
Other Countries	121	504	924
Total	29,589	154,072	117,643

47. PICTURES—*continued.*

	1884.	1889.	1894.
Paintings, drawings, engravings, and prints :—	$	$	$
Great Britain	9,688	6,253	4,420
United States	45,576	25,664	56,864
France	4,931	592	2,451
Germany	1,138	372	558
Other Countries	335	136	310
Total	61,668	33,017	64,603

48. PLATE AND PLATED WARE.

Electro-plated ware and gilt ware of all kinds :—			
Great Britain	51,024	56,510	39,846
United States	121,596	87,283	130,738
France	1,274	2,232	5,652
Germany	—	6,714	8,630
Other Countries	683	193	1,671
Total	174,577	152,932	186,537
Jewellery of gold or silver, or other metal or imitations of :—			
Great Britain	229,623	123,195	32,573
United States	309,734	334,364	179,270
France	6,477	6,514	9,099
Germany	2,664	11,875	16,638
Austria	4,025	370	1,809
Switzerland	1,841	296	174
Other Countries	481	467	—
British East Indies	—	—	1,423
Total	554,845	477,081	240,986
Nickel-plated goods :—			
Great Britain	—	756	1,291
United States	—	4,873	8,471
Germany	—	234	1,106
Other Countries	—	427	646
Total	—	6,290	11,514

49. PROVISIONS (not otherwise described).

Provisions (not otherwise described) :—			
Lard, tried or untried :—			
Great Britain	257	219	8
United States	339,192	642,486	18,711
Other Countries	65	—	770
Total	339,514	642,705	19,489
Meats :—			
Bacon and hams :—			
Great Britain	1,994	813	612
United States	445,184	335,185	48,701
Australasia	—	—	9,062
Other Countries	80	82	69
Total	447,258	336,080	58,444
Beef :—			
Great Britain	1,291	723	531
United States	267,944	205,875	155,852
Other Countries	110	45	1,617
Total	269,345	206,643	158,000

49. PROVISIONS (not otherwise described)—*continued.*

	1884.	1889.	1894.
	$	$	$
Extract of meat:—			
Great Britain	8,001	3,987	7,883
United States	3,206	5,410	31,359
Other Countries	10	205	189
Total	11,217	9,602	39,431
Mutton:—			
Great Britain	—	—	—
United States	15,959	13,555	1,370
Australasia	—	—	1,586
Total	15,959	13,555	2,956
Pork:—			
Great Britain	1,601	15	—
United States	1,083,052	1,024,040	382,078
Other Countries	12	—	—
Total	1,084,665	1,024,055	382,078
Poultry and game, all kinds of:—			
Great Britain	282	1,198	476
United States	16,431	9,759	8,978
China	1,099	1,538	784
Other Countries	16	181	451
Total	17,828	12,676	10,671
Prepared meats, sealed or unsealed, in cases or otherwise, N.E.S.:—			
Great Britain	2,175	1,695	1,949
United States	76,345	90,749	111,755
Australasia	—	—	20,380
China	—	1,388	2,494
France	—	154	1,672
Other Countries	371	93	265
Total	78,891	94,079	138,515
Other meats, N.E.S.:—			
Great Britain	189	117	494
United States	13,539	14,765	84,872
Other Countries	4	188	782
Total	13,732	15,070	86,148

50. RAGS.

Rags of cotton, linen, jute and hemp, paper waste and clippings, and waste of any kind fit only for manufacture of paper:—			
Great Britain	30,561	33,807	88,594
United States	120,227	88,743	102,264
Belgium	1,622	3,200	802
France	—	6,684	—
Germany	—	13,805	—
Other Countries	34	5	—
Total	152,444	146,244	191,660

51. SALT.

	1884.	1889.	1894.
Refined:—			
Great Britain	$ 38,407	$ 23,383	$ 23,616
United States	6,823	15,119	29,910
Other Countries	8	—	5
Total	45,238	39,502	53,531
Unrefined:—			
Great Britain	245,241	203,208	266,051
United States	13,178	3,928	13,484
Spain	3,720	6,501	3,892
Italy	6,885	2,200	13,843
British West Indies	35,740	17,569	20,278
French West Indies	13,362	10,970	5,019
Dutch West Indies	1,296	648	441
Portugal	—	5,261	4,738
Portuguese Possessions in Africa	—	2,190	—
Other Countries	1,821	534	220
Total	321,243	253,009	327,966

52. SEEDS OF ALL SORTS.

Flax Seed:—			
Great Britain	3	2	151
United States	1,928	386	201,720
France	—	10	—
Holland	3,808	2,953	2,849
Total	5,739	3,351	204,720
Flower, garden, field and other seed for agricultural purposes, in bulk or large parcels:—			
Great Britain	27,840	23,710	10,350
United States	277,079	39,530	378,168
France	14,561	16,484	6,741
Germany	3,820	1,174	4,206
Other Countries	380	138	574
Total	323,680	81,036	400,039
Flower, garden, field and other seed for agricultural purposes, in small papers or parcels:—			
Great Britain	408	208	203
United States	2,864	1,970	4,587
Other Countries	110	16	94
Total	3,382	2,194	4,884
Bulbous roots:—			
Great Britain	480	1,416	—
United States	1,387	6,574	648
Holland	2,852	3,494	—
Other Countries	537	1,119	—
Total	5,256	12,603	648

CANADA.

53. SILK, THROWN, TWIST AND YARN.

	1884.	1889.	1894.
	$	$	$
Silk, thrown, twist and yarn :—			
Silk in the gum or spun, not more advanced than singles, tram and thrown organizine not coloured and coloured :—			
Great Britain	3,287	4,039	3,943
United States	2,119	7,714	3,817
Total	5,406	11,753	7,760
Silk raw or as ruled from the cocoon, not being doubled, twisted or advanced in manufacture any way :—			
Great Britain	556	24,270	75
United States	108,524	111,613	202,965
Japan	—	26,490	—
Total	109,080	162,373	203,040
Silk cocoons and silk waste :—			
Great Britain	464	191	—
United States	358	674	23
Total	822	865	23

54. SILK MANUFACTURES.

(a.) *Broad Piece Goods.*

Dress and piece goods :—			
Great Britain	742,593	518,491	650,056
United States	2,972	7,359	26,563
France	27,546	26,974	47,220
Germany	8,314	20,964	42,552
Switzerland	2,643	12,695	40,171
Japan	—	390	14,951
China	—	407	1,324
Other Countries	270	184	692
Total	784,338	587,464	823,529
Velvets :—			
Great Britain	70,590	187,622	136,548
United States	257	1,083	4,420
France	182	444	626
Germany	827	7,771	21,521
Switzerland	311	—	83
Total	72,167	196,920	163,193

(b.) *Of Other Kinds.*

Handkerchiefs :—			
Great Britain	—	96,260	73,276
United States	—	3,546	3,846
France	—	444	1,324
Germany	—	1,421	1,576
China	—	1,630	2,295
Japan	—	1,375	45,546
Other Countries	—	498	304
Total	—	105,174	128,167

54. SILK MANUFACTURES—*cont.*

(b.) *Of Other Kinds*—continued.

	1884.	1889.	1894.
Hosiery :—	$	$	$
Great Britain	16,322	5,771	3,248
United States	123	202	518
Germany	—	765	2,018
Other Countries	475	—	105
Total	16,920	6,738	5,889
Ribbons :—			
Great Britain	331,824	512,733	456,015
United States	3,943	4,739	10,519
France	23,486	29,200	14,639
Germany	3,582	6,504	16,530
Switzerland	1,270	12,289	35,070
Other Countries	—	27	131
Total	364,105	565,492	532,904
All other manufactures of silk, N.E.S. :—			
Great Britain	636,826	938,245	402,677
United States	52,177	52,397	42,327
France	8,296	50,110	31,947
Germany	7,761	42,014	18,088
China	1,628	1,710	839
Japan	—	8,273	20,628
Other Countries	157	2,414	3,693
Total	706,845	1,095,163	520,199
Sewing silk and silk twist :—			
Great Britain	51,830	31,802	13,430
United States	23,552	38,546	11,314
Other Countries	310	1,212	214
Total	75,692	71,560	24,958

55. SKINS AND FURS.

Skins and furs :—			
Fur skins of all kinds not dressed in any manner, N.E.S. :—			
Great Britain	98,289	117,590	184,050
United States	154,238	299,411	286,624
France	—	—	5,301
Germany	67,694	96,151	150,814
Russia	3,480	61	—
Newfoundland	1,803	3,088	298
Other Countries	483	224	591
Total	325,987	516,525	627,678
Fur skins wholly or partially dressed :—			
Great Britain	172,465	270,559	300,069
United States	176,325	117,386	73,565
France	5,796	5,172	5,082
Germany	97,517	248,278	218,518
Belgium	8,500	2,813	13,838
China	2,315	744	5,702
Russia	—	8,896	945
Other Countries	480	1,105	1,325
Total	463,398	654,953	619,044

55. SKINS AND FURS—*continued.*

	1884.	1889.	1894.
Skins and furs—*continued.*	$	$	$
Caps, hats, muffs, &c., and other manufactures of fur :—			
Great Britain	144,976	71,219	49,056
United States	24,495	18,208	17,012
Germany	9,289	12,868	16,897
Other Countries	524	284	4,986
Total	178,284	102,579	87,951
Furs and skins, undressed, the produce of fish or other marine animals :—			
Great Britain	—	—	—
United States	—	294	14,229
Newfoundland	—	7,042	12,554
Japan	—	—	18,500
Other Countries	—	—	585
Total	—	7,336	45,868

56. SOAP.

Soap :—			
Common brown and yellow, not perfumed :—			
Great Britain	9,701	6,874	35,220
United States	28,067	6,307	5,219
Other Countries	—	39	22
Total	37,768	13,220	40,461
Common, soft, and liquid, not perfumed, saddlers' soap, and silver soap :—			
Great Britain	498	610	1,240
United States	4,366	1,772	1,889
Other Countries	22	3	5
Total	1,886	2,385	3,134
Castile and white :—			
Great Britain	4,693	1,956	2,410
United States	3,517	3,182	3,256
France	5,331	5,492	11,512
Other Countries	—	1,078	262
Total	13,541	11,708	17,470
Perfumed or toilet :—			
Great Britain	14,109	15,996	19,896
United States	25,069	20,196	21,323
France	2,007	899	1,588
Other Countries	173	506	437
Total	41,358	37,597	43,244
Soap powders, sapolio, and other like articles : —			
Great Britain	14	75	3,790
United States	9,689	39,492	49,723
France	—	9,866	1
Other Countries	—	—	3
Total	9,703	49,433	53,517

57. Spirits.

	1884.	1889.	1894.
	$	$	$
Brandy:—			
Great Britain	98,053	33,683	26,667
United States	1,889	486	2,590
France	356,739	352,246	272,689
Other Countries	607	162	1,440
Total	457,288	386,577	303,386
Geneva gin and old tom gin:—			
Great Britain	46,457	46,121	33,960
United States	1,039	16	6
Holland	138,237	146,511	122,872
Belgium	5,262	711	11
Other Countries	580	394	302
Total	191,575	193,753	157,151
Rum:—			
Great Britain	17,490	13,497	13,382
United States	2,027	340	527
British West Indies	14,545	9,029	9,274
British Guiana	30,272	21,901	17,325
France	—	—	5,971
Other Countries	437	931	1,097
Total	64,771	45,698	47,576
Whiskey:—			
Great Britain	176,670	183,122	274,314
United States	13,841	11,988	8,646
France	—	—	1,472
Other Countries	860	189	810
Total	191,371	195,299	285,242
Spirits and wines:—			
Wines of all kinds, except sparkling wines, including ginger, orange, lemon, strawberry, raspberry, elder and currant wines, containing 26 per cent. or less of spirit:—			
Great Britain	24,206	17,018	10,040
United States	7,761	9,796	16,352
France	59,030	91,928	90,676
Germany	2,449	11,011	5,319
Spain	20,638	60,221	36,883
Italy	2,355	16,195	752
China	20,464	30	58
Portugal	—	2,718	502
Holland	—	—	4,762
Other Countries	1,094	836	2,154
Total	137,997	209,753	167,498
Wines of all kinds, except sparkling wines, including ginger, orange, lemon, strawberry, raspberry, elder and currant wines, containing more than 26 per cent. of spirits:—			
Great Britain	53,033	39,823	23,915
United States	4,973	5,099	4,564
France	6,634	7,960	21,581
Germany	1,650	3,906	5,508
Spain	93,198	75,316	77,096
Italy	85,323	11,737	9,798
Portugal	26,537	51,377	26,442
Other Countries	2,491	6,543	7,767
Total	223,839	201,761	176,671

57. SPIRITS—*continued.*

	1884.	1889.	1894.
	$	$	$
Spirits and wines—*continued.*			
Champagne and all other sparkling wines:—			
Great Britain	16,265	16,171	15,157
United States	14,316	4,416	1,715
France	92,308	92,365	116,877
Germany	2,322	1,308	3,183
Belgium	—	7,366	—
Other Countries	767	284	10
Total	125,978	121,910	136,942
Cologne water and perfumed spirits:—			
Great Britain	14,655	10,765	13,862
United States	9,999	14,717	13,183
France	18,389	25,826	28,170
Germany	793	2,392	5,645
Other Countries	—	27	434
Total	43,836	53,727	61,234
All other sorts:—			
Great Britain	3,929	5,302	7,106
United States	43,188	19,265	13,601
France	8,856	13,800	32,894
Germany	2,462	1,116	382
Belgium	—	10,073	10
China	—	10,124	7,160
Other Countries	538	1,971	2,979
Total	58,973	61,651	64,132

58. STATIONERY OTHER THAN PAPER.

Pencils, lead, in wood or otherwise:—			
Great Britain	11,597	8,941	7,564
United States	35,514	34,587	36,544
Germany	4,280	12,926	10,231
Other Countries	452	547	167
Total	51,843	57,001	54,506
Ink, writing:—			
Great Britain	15,241	17,852	10,783
United States	11,052	15,774	14,385
France	1,352	2,786	2,494
Other Countries	35	41	32
Total	27,680	36,453	27,694
Ink, printing:—			
Great Britain	3,626	2,010	3,095
United States	40,421	40,705	41,810
France	—	1,592	9,085
Other Countries	847	484	665
Total	44,894	44,791	47,455
Stationery:—			
Great Britain	25,228	—	—
United States	23,309	—	—
France	2,881	—	—
Germany	1,986	—	—
Other Countries	129	—	—
Total	53,533	—	—

59. SLATES, AND MANUFACTURES OF.

	1884.	1889.	1894.
School and writing slates, porcelain, drawing, &c, :—	$	$	$
Great Britain	1,015	16	8
United States	15,143	2,129	4,307
Other countries	615	27	60
Total	16,773	2,172	4,375
Slates, square or in special shapes, and all other manufactures of slate :—			
Great Britain	455	—	287
United States	9,321	39,166	22,334
Germany	578	—	2,201
Other countries	—	—	32
Total	10,354	39,166	24,854

60. GRINDSTONES, MILLSTONES, AND OTHER SORTS OF STONE.

Grindstones :—			
Great Britain	637	2,716	2,844
United States	29,834	22,521	21,734
Other Countries	—	300	—
Total	30,471	25,537	24,578
Manufactures of stone or granite, N.E.S. :—			
Great Britain	17,210	37,350	32,578
United States	27,578	22,863	16,253
Germany	1,419	1,084	799
Other countries	9	608	85
Total	46,216	61,905	49,715
Emery, pumice, and pumice stone :—			
Great Britain	6,633	2,262	2,569
United States	8,360	14,617	15,983
Other Countries	—	9	41
Total	14,993	16,888	18,593
All other stone, &c. :—			
Great Britain	762	26,154	12,677
United States	84,072	137,051	81,833
France	632	3,748	292
Belgium	3,761	1,360	5,638
Other countries	—	—	29
Total	89,227	168,313	100,469

61. SUGAR REFINED.

Sugar, imported direct or not imported direct from the country of growth and production, above No. 14 D.S. in colour :—			
Great Britain	198,172	48,780	4,133
United States	30,788	98,446	14,362
Spanish West Indies	28,229	6,517	903
China	25,871	740	107,468
Dutch East Indies	—	—	5,026
Australasia	—	—	2,343
British West Indies	—	—	1,455
Other Countries	1,600	948	752
Total	284,660	155,431	136,442

62. TELEGRAPH APPARATUS.

	1884.	1889.	1894.
Electric arc light carbons, or carbon points of any length, also electric light apparatus:—	$	$	$
Great Britain	281	14,725	24,301
United States	55,904	189,485	247,541
France	—	639	2,557
Germany	—	442	1,474
Other Countries	43	—	327
Total	56,228	205,291	276,200
Meters and motors:—			
Great Britain	—	—	937
United States	—	—	62,402
Germany	—	—	22
Total	—	—	63,361
Telephones and telegraph instruments, galvanic batteries, electric and incandescent light globes, and insulators of all kinds, N.E.S.:—			
Great Britain	3,901	2,156	32,780
United States	33,644	33,031	142,025
France	—	738	1,027
Germany	—	267	12,311
Other Countries	333	24	581
Total	37,878	36,216	188,724

63. UMBRELLAS AND PARASOLS.

Umbrellas, parasols and sun shades of all kinds of material:—			
Great Britain	253,961	299,657	197,998
United States	3,296	1,232	3,076
France	49	133	996
Germany	—	1,760	2,949
Japan	—	116	89
Other Countries	72	438	13
Total	257,368	303,336	206,021

65. WOOL.

Leicesters, Cotswold, Lincolnshire, Down, combing wools, or wools known as lustre wools, and other like combing wools, such as are grown in Canada:—			
Great Britain	3,619	598	149
United States	9	9	61
Other Countries	—	—	1
Total	3,628	607	211
Wool, unmanufactured, N.E.S.:—			
Great Britain	385,387	469,630	364,571
United States	554,042	698,067	566,401
Belgium	28,510	3,269	—
British Africa	185,177	95,354	14,896
Australia	—	227,673	68,413
Austria	—	51,269	—
France	—	59,258	70,755
Other Countries	17,728	835	218
Total	1,170,844	1,605,355	1,085,254

65. WOOL—*continued.*

	1884.	1889.	1894.
Noils, being the short wool which falls from the combs in worsted factories:—	$	$	$
Great Britain	—	—	32,706
United States	—	621	419
Total	—	621	33,125

66. WOOLLEN AND WORSTED YARNS.

Knitting, fingering and worsted yarns:—			
Great Britain	185,195	113,412	125,253
United States	2,717	1,574	419
Germany	5,935	13,511	33,315
Other Countries	100	1,026	443
Total	193,947	129,523	159,430
Yarn made of wool or worsted, the same being genapped, dyed and finished, imported by manufacturers of braids, cords, tassels, and fringes:—			
Great Britain	—	1,680	6,304
United States	—	—	638
Germany	—	—	125
Other Countries	—	—	—
Total	—	1,680	7,067

67. WOOLLEN AND WORSTED MANUFACTURES.

Woollen and worsted manufactures:—			
Cassimeres, cloths, coatings, doeskins, tweeds, meltons, overcoatings, felt cloth, N.E.S., and horse collar cloth:—			
Great Britain	3,178,109	3,310,436	2,693,986
United States	12,698	30,675	45,226
France	4,859	18,930	16,882
Germany	29,463	32,213	44,500
Belgium	3,207	6,854	4,765
Australasia	—	—	2,361
Other Countries	32	425	278
Total	3,227,868	3,339,533	2,807,998
All other manufactures, composed wholly or in part of wool, worsted, the hair of the alpaca goat, or other like animal:—			
Great Britain	2,363,683	3,313,205	2,842,273
United States	62,259	46,441	48,054
France	38,774	170,365	331,371
Germany	37,615	168,231	332,567
Belgium	1,158	—	—
Other Countries	1,489	1,611	2,742
Total	2,504,978	3,699,853	3,552,007

(c.) *Flannels.*

Flannels, including plain and checked, of all colours:—			
Great Britain	226,054	202,669	130,498
United States	5,887	8,732	3,895
Germany	2,481	24,350	7,258
France	—	8,441	7,508
Other Countries	185	113	—
Total	234,607	244,305	149,259

CANADA.

67. WOOLLEN AND WORSTED MANUFACTURES—*continued.*

(d.) *Blankets.*

	1884.	1889.	1894.
Blankets :—	$	$	$
Great Britain	119,506	46,450	20,295
United States	2,223	2,284	1,182
Other Countries	29	160	35
Total	121,758	48,894	21,512

(f.) *Carpets.*

Carpets, Brussels and tapestry :—			
Great Britain	729,949	967,080	869,046
United States	4,135	3,293	26,818
Germany	—	2,671	2,593
Other Countries	151	168	347
Total	734,235	973,212	898,804
Carpets, two ply and three ply treble ingrain, composed wholly of wool :—			
Great Britain	57,817	41,715	20,116
United States	648	2,156	7,955
Total	58,465	43,871	28,071
Carpets, two ply and three ply, treble ingrain, of which warp is composed of cotton or other material :—			
Great Britain	28,915	17,228	12,428
United States	968	2,000	22,472
Total	29,883	19,228	34,900

68. YARN, ALPACA, AND MOHAIR, AND OTHER SORTS UNENUMERATED.

Yarn, alpaca, and mohair, and other sorts unenumerated :—			
Great Britain	—	8,329	295
United States	—	1,135	39
Total	—	9,464	334

NEWFOUNDLAND.

NEWFOUNDLAND.

No. 2.

SIR H. MURRAY to MR. CHAMBERLAIN.

(Received December 15, 1896.)

Government House, St. John's,
December 7, 1896.

SIR,

WITH reference to your Circular Despatch of the 28th November 1895, I am at last in a position to forward, for your information, a copy of the report of the Receiver-General of this Colony, dated the 3rd instant, on the subject of the alleged displacement of British and Colonial manufactures in the Colonial markets.

2. Although, owing to the unsatisfactory condition of the Civil Service in this Colony, great delay has occurred in the preparation of the report; the question, so far as this Colony is concerned, lies in a very narrow compass.

3. The report is accompanied by four tables * in a separate book, dealing with the importations in the years 1884, 1889, 1894. These tables have been accidentally misplaced; tables 3 and 4 should have preceded those numbered 1 and 2.

4. It will be seen from these tables that with the exception of goods, such as salt, which is mainly imported from Spain; Portugal, and the West Indies, for use in the fisheries, the foreign trade of Newfoundland is almost entirely with the United States.

5. Roughly speaking, two-thirds of the trade of the Colony is with the Mother Country or Canada, but in both cases the statistics are vitiated by the practice, in many cases necessary, of accepting the port of shipment as the port of origin.

6. Viewing the matter generally, there seems no evidence to show that, with the exception of hardware, machinery, and medicines, the trade with the States is superseding that with England. As regards the two latter, the trade seems to have passed almost entirely to the States; and the reasons why the hardware trade is also passing to them are set out in the letter from the trader annexed to the report. Whether this trade can be recovered is a matter which must rest with the manufacturers in England.

I have, &c.,
H. MURRAY,
Governor.

Enclosure in No. 2.

Receiver General's Office,
St. John's, Newfoundland, December 3rd, 1896.

YOUR EXCELLENCY,

IN compliance with your request I have the honour to report, as fully as statistics available and information obtained from merchants in this city will enable me, upon the matter referred to in the Circular of the Right Honourable the Secretary of State, of date November 28th, 1895.

In order to place your Excellency in a position to form a correct idea of the relative value of imports from foreign countries and those within the British Empire, I have caused a return to be prepared, showing the total value of all articles imported in the years 1884, 1889, and 1894, of which a special record was kept, or was obtainable, and the value of such articles imported from foreign countries.

From this table or statement a second has been compiled in the same book, which accompanies and forms part of this report, specifying only those articles the value of which imported from foreign countries was 5 per cent. or upwards of the total value of the article imported, and when the total value of the article imported was not less than 500*l*.

In these statements I have prefixed to the names of articles numbers corresponding with those prefixed to the commodities enumerated in annexed schedule of the Circular.

With respect to some of the commodities imported into the Colony, especially flour and pork, the returns are not fully reliable as to the country of origin, when the imports appear as from Canada.

Of course the importation of food products of Canadian origin are very great, but quite a large quantity of United States flour and pork come by way of Canada; and, until recently, when by direction of the Government the necessary alteration in the mode of preparing statistics was made, commodities coming by way of Canada appeared in the returns as if of Canadian origin.

In the year 1884 the total value of imports as appears by the Customs Returns and House of Assembly Journal, 1885, Appendix, page 174, was $8,075,792, of which $3,084,132 came from the United Kingdom, $2,462,974 from foreign countries, and $2,528,686 from British Colonies. Of the foreign importations $2,145,928 came direct from the United States, of which about $1,500,000 was in food products.

In 1889 the total value of imports (see House of Assembly Journal, 1890, page 33, Appendix) was $6,607,065, of which the United Kingdom sent $2,653,152, British

* Not printed.

CANADA.

67. WOOLLEN AND WORSTED MANUFACTURES—*continued.*

(d.) *Blankets.*

	1884.	1889.	1894.
Blankets :—	$	$	$
Great Britain	119,506	46,450	20,295
United States	2,223	2,284	1,182
Other Countries	29	160	85
Total	121,758	48,894	21,512

(f.) *Carpets.*

Carpets, Brussels and tapestry :—			
Great Britain	729,949	967,080	869,046
United States	4,135	3,293	26,818
Germany	—	2,671	2,593
Other Countries	151	168	347
Total	734,235	973,212	898,804
Carpets, two ply and three ply treble ingrain, composed wholly of wool :—			
Great Britain	57,817	41,715	20,116
United States	648	2,156	7,955
Total	58,465	43,871	28,071
Carpets, two ply and three ply, treble ingrain, of which warp is composed of cotton or other material :—			
Great Britain	28,915	17,228	12,428
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NEWFOUNDLAND.

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Enclosure in No. 2.

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In these statements I have prefixed to the names of articles numbers corresponding with those prefixed to the commodities enumerated in annexed schedule of the Circular.

With respect to some of the commodities imported into the Colony, especially flour and pork, the returns are not fully reliable as to the country of origin, when the imports appear as from Canada.

Of course the importation of food products of Canadian origin are very great, but quite a large quantity of United States flour and pork come by way of Canada; and, until recently, when by direction of the Government the necessary alteration in the mode of preparing statistics was made, commodities coming by way of Canada appeared in the returns as if of Canadian origin.

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In 1889 the total value of imports (see House of Assembly Journal, 1890, page 33, Appendix) was $6,607,065, of which the United Kingdom sent $2,653,152, British

* Not printed.

NEWFOUNDLAND.

Colonies $2,168,763, foreign countries $1,785,150, of which there came direct from United States $1,615,143, and of which about $1,121,789 appears to have been for commodities for food.

In 1894 the total imports per Customs Returns, House of Assembly Journal, 1894-95, Appendix, page 39, was $7,164,738, of which $2,538,942 came from the United Kingdom, $2,952,046 from British Colonies, and $1,673,750 from foreign countries, of which the United States contributed $1,577,060, including $884,673 for food stuffs.

In order to give your Excellency an idea of the trade of this Colony with the United States in commodities other than such as are used as food, I have had prepared statements showing in one column the quantities imported from the United States, and in another column the total value of the importation of such articles. There is also a statement exhibiting the value of the various articles of food imported from the United States which will show the proportion borne to the total importation of such articles.

I shall attempt to answer as to the imports in the returns according to the instructions, and may begin by dismissing Nos. 1 and 2, as no import from foreign countries appear under that heading indicated by these numbers.

3. *Apparel and Slops.*—There are some goods under this head, cottons, calicoes, imitation flannel, for which see number 23.

4. *Arms and Ammunition.*—Foreign imports practically nil.

6. *Beer and Ale.*—Foreign imports always small, now practically abandoned.

7. *Biscuit and Bread.*—Chiefly fancy biscuits imported because of cheapness.

9. *Books, Printed.*—Cheapness of certain kinds of literature and less cost for importation.

10. *Butter.*—Quantity imported is diminishing owing to the establishment of factories for manufacture of substitutes for butter, such as oleo-margarine. The American suited the market in quality and price at one period which is now past.

11. *Candles.*—In candles the United States has always had a large trade, principally owing to relations between some of the St. John's firms and some Boston houses, but the importations from the United Kingdom show quite an increase.

12. *Caoutchouc.*—The United States, as will be observed, is losing this trade.

13. *Carriages and Waggons.*—Occasional purchases are made in the United States for private persons giving special orders, but there are no consignments of importance. Railway carriages have been imported from the United States and Canada, and a small number made in this country.

15. *Cheese.*—The trade in cheese has fallen to the Canadians, only 70 cwt. having been imported from the United States in 1894.

18. *Clocks and Watches.*—American clocks and watches from the Waltham factory are considered fairly good and sell very cheaply.

20. *Cordage.*—Large sails are made by an American company established at Gloucester, the American Net and Twine Company, which manufacture articles especially suited to the fishery from their durability, neatness, and lightness.

23. *Cotton Manufactures.*—In this Colony there are no specific statistics to enable a return to be made to this number. The commodities covered by this description are, under the Newfoundland Revenue Laws, taxable as unenumerated goods, and in the Customs returns included under the head of woollen, cottons, &c.; while according to the table the United States do not send us 5 per cent. of the total value under that heading, yet in some lines included thereunder the import from the United States is very large, as will appear by reference to accompanying statement. I have accordingly thought best to place on this list the value imported from the United States. To quote from a letter I received in reply to an inquiry: "The buyers of this Colony "do a considerable business with the United States in cotton ducks, cotton twines, "cotton lines, cotton blankets, printed cotton, calicoes, imitation flannel, cotton hosiery, "shirts, shirt-collars, braces and oil clothing; beautiful patterns in rugs and carpets "which if once introduced to the wholesale houses of England and Scotland they "would, to protect themselves, buy from the United States in preference to goods "manufactured in Britain. Our buyers visit the English markets twice a year; the "trade relations with the mother country and this country are very large; perhaps "more than three quarters of the dry goods imported are bought in the British market, "although a very large percentage of our purchase are foreign made, such as dress

" fabrics, mantles, buttons, trimmings, silks, plushes, ribbons, laces, artificial flowers, feathers, kid gloves, cottons and woollen hosiery, flannelette, ladies' and childrens' shoes, ladies' jackets, which although bought in England are mostly made in France and Germany; the reason no doubt to a very large extent is cheapness in production, superior finish combined with free trade, free sale, and free market offered to all countries by Great Britain."

23. *Canvas.*—As will be observed, the importation of canvas from the United States is very great, averaging over 60 per cent. of the whole importation for the years cited. The import is of cotton duck, which is made light enough for women's aprons and heavy enough for vessels' sails.

26. *Furniture—Furniture and Cabinet-ware.*—The United States supplies this market with light and cheap articles, the cost of importation of which, as well as the original cost, is much less than if purchased in Great Britain.

27. *Glass*—Similar observations apply to this; the proportion from the United States is falling off.

29. *Haberdashery.*—There is no special return under this heading; but the remarks in the letter above quoted partially apply.

30. *Cutlery and Hardware.*—This with us includes the articles numbered 32 and 33. I again quote an extract from a letter in reference to this subject: "American edge tools are imported in preference to English, as they are of a much better make and more suitable to the idea of the workmen who go in for the best make of tools; in a great many instances American hardware is preferred to that of English manufacture on account of its cheapness and neatness. In fact, the Americans are alive to all the new improvements while the English move along in the old rut; this, we believe, is the outcome of the encouragement given to Americans for inventing. The cost of importing English hardware is about 50 per cent., the cost of importing American is from 35 to 40 per cent. The imports from America are farming implements, carpenters', joiners', and coopers' tools, wool cards, spinning wheels, locks, hinges, axes, axe handles, scythes, snathes, lamps, burners, lamp wicks, lamp chimneys, wire goods, wooden ware, glass ware of a style not made in England, all sorts of fine cast-iron goods. The American goods are much neater than the English make, and no better proof can be given than the way in which the English factor is imitating the American manufactures; see Gordon and Sons, London, Goodall and Company, London, and many more, who are all now getting up full lines of American small wares, simply because they are cheaper and neater than the English made."

34. *Leatherware of all kinds.*—In 1894 not quite one-third of these commodities were imported from the United Kingdom, and the proportion has not very materially altered since 1884. Canada sends us about one half, somewhat of an increase, while the United States has declined from a little more than one-sixth to somewhat less than one-eighth.

Leather.—In 1884 more than 66 per cent. imported from the United States; now it is about 27⅓, while Canada has increased from something less than 33⅓ to over 70 per cent. The United Kingdom sent then, and sends now, but a small quantity, which nevertheless shows an increase from $1,833 to $2,454.

37. *Machinery.*—As will be observed, the proportion of value imported from the United States till 1889 was extremely low, but since that time the construction of railways has rendered necessary the importation from the United States of machinery more readily procured there than elsewhere, and some milling machinery also suitable in price has also been obtained.

39. *Medicines.*—The medicines imported from the United States are chiefly what are called patent.

44. *Painters' Colours.*—It will be observed that the import of painters' colours from foreign countries has declined from 25 per cent. to less than 5 per cent.

45. *Writing Paper.*—This is imported from the United States, because of its cheapness.

48. *Plate and Plated Ware.*—The imports are not large, and the qualities imported from the United States are of a cheap kind.

49. *Provisions.*—The articles which I assume would be included under this heading have been treated of already.

NEWFOUNDLAND.

56. *Soap.*—As will be observed, the tendency is unfavourable to importation from foreign countries. While in 1884 more than 66 per cent. was imported from the United States, in 1894 little more than 6 per cent. was so imported.

57. *Spirits.*—Rum at one time was imported *viâ* the United States from the West Indies with a small quantity of American manufacture, but this traffic is ended.

61. *Sugar, refined.*—The trade which at one time existed between the United States and this Colony in this article, appears now to have almost altogether ceased.

64. *Woodenware.*—There must of necessity be a trade between the United States and this country owing to the facilities in that country for producing those wares, and the proximity of Newfoundland thereto.

51. *Salt.*—Salt for the Newfoundland fishery is brought chiefly in English vessels in the Newfoundland trade from Portugal, Spain, Italy, and the British West Indies.

67. See remark No. 23.

The commodities indicated in Annex 1, of the Circular by the Nos. 31, hats and caps, 35, linen and jute yarn, 36, linen and jute manufactures, 42, oil and floor cloths, 53, silk, thrown, twist, and yarn, 54, silk manufacture, 55, skins and furs, 63, umbrellas and parasols, 66, woollen and worsted yarn, 67, woollen and worsted manufacture, 68, yarn alpaca, mohair and other sorts unenumerated are not separately accounted for in the Newfoundland returns, and are included under heading "Woollens, cottons, &c., and miscellaneous articles."

It is practically almost impossible with the means of information at hand to give the price of foreign articles as compared with British,

Your Excellency will observe that, save in hardware, the foreign manufacturer has not succeeded in displacing goods of British manufacture, except of course where such displacement originally occurred in Great Britain as referred to under No. 23. This preference for certain lines of United States goods is not confined to this Colony, but, for the selfsame reasons which operate in their favour here, has been exhibited elsewhere in the British Empire.

I shall be pleased to give your Excellency any further information in my power to obtain.

I have, &c.,
P. J. SCOTT, R.G.

P.S.—I annex a copy of a letter, dated the 7th instant, from a leading importer in this city giving some reasons why American hardware is superseding similar goods from England. Samples of goods on the annexed price list, marked "A,"* will be consigned to the Chamber of Commerce, London, by the S.S. "Mongolian" direct to Glasgow from this port. The price list marked "B"* purports to give the invoice prices with costs and expenses, and also discounts.

I have been informed that axes, especially the Monroe axe, can be sold much cheaper than any axe approaching its quality, if imported from the United Kingdom.

December 7, 1896. P. J. SCOTT, R.G.

Water Street, St. John's, Newfoundland,
December 7, 1896.

Some REASONS for importing AMERICAN HARDWARE.

1st. Orders sent to the States are filled in about half the time of English orders; for instance, we sent an order to a London firm on September 1st, 1896, and the goods are not yet received (December 7th). Orders to the States are usually received in one month from the date of sending the order.

2nd. A great point in favour of American goods is the small charge for packages; in most cases packages are free, while English packages are in most cases most unreasonably high-priced.

3rd. The neatness and nice appearance American goods have in comparison with English goods of the same class. I mean the way the American is put up in boxes, which look nice on the shelves, and is much less trouble for the assistant to keep in order, whereas most of the English hardware (I mean ordinary shelf goods) is put up in brown paper parcels, which paper, after being opened a few times, gets broken, and

* Not printed.

presents a most unsightly appearance on the shelves; this especially applies to files, hand-saws, hammers, chisels, &c. NEWFOUNDLAND.

4th. The fine finish of the American tools is lacking in the English tools, which finish goes a long way in the selling of an article, although for genuine hard usage English tools may be best. Still, the goods that sell best are the goods we must have; the average customer prefers the article that most pleases the eye; this especially applies to edge tools, hammers, saws, &c.

These are a few reasons for importing American hardware in preference to English, but I think the greatest reason is the short time in which American orders are executed.

GEORGE KNOWLING,
per H. HUTCHINS.

ARTICLES IMPORTED into NEWFOUNDLAND and TOTAL VALUE of any of which was not less than 500*l.*, and whereof 5 per cent. and upwards IMPORTED from FOREIGN COUNTRIES.

No.	Articles.	1884. Foreign Countries.	1884.	1884. Total Valuation.	1889. Foreign Countries.	1889.	1889. Total Valuation.	1894. Foreign Countries.	1894.	1894. Total Valuation.
			$	$		$	$		$	$
2	Animals, horses	United States	980	16,450		—	11,550		—	15,420
3	Apparel, slops, viz.:— Men's and women's	United States	11,584	113,901	United States	19,190	142,171	United States	17,324	209,155
		St. Pierre	129	—	St. Pierre	551	—	St. Pierre	24	—
4	Arms and ammunition:— Guns	United States	660	6,347		—	—		—	—
	Gunpowder	" "	95	19,780		—	—		—	10,075
	Shot		—	5,930		—	7,377		—	4,711
	Dynamite		—	—		—	—		—	4,946
6	Beer and ale	United States	2,292	24,075	United States	15	10,540	United States	64	13,627
7	Biscuit and bread	" "	1,438	17,266	" "	1,700	9,155	" "	6,113	23,562
9	Books, printed	" "	1,595	26,326	" "	4,104	20,970	" "	8,739	35,520
10	Butter	" "	115,804	306,926	" "	88,260	269,472	" "	32,753	120,544
		St. Pierre	1,580	—	St. Pierre	496	—	St. Pierre	32	—
8	Bleaching material	No account.			No account.			No account.		
—	Brushes	No account.			No account.			No account.		
—	Anchors and chains	No account.			No account.			United States	584	11,326
11	Candles	United States	2,685	5,054	United States	2,198	4,502	" "	1,072	2,631
12	Caoutchouc, manufactured	" "	7,156	14,523	" "	3,867	8,437	" "	3,937	28,584
13	Carriages and waggons	" "	978	2,371	" "	32	1,528	" "	1,293	4,827
15	Cheese	" "	2,868	27,168	" "	56	17,412	" "	836	27,264
18	Clocks and watches	" "	5,254	9,045	" "	2,724	4,800	" "	4,123	7,504
20	Cordage	" "	7,201	67,094	" "	7,625	48,740	" "	5,105	39,108
23	Woollens, cottons, &c.	" "	33,278	1,333,565	" "	26,618	815,509	" "	25,751	1,074,609
		St. Pierre	1,489	—	St. Pierre	25	—	St. Pierre	141	—

—	Canvas, sail	United States			33,314	56,216	United States			46,420	63,141	United States			21,571	37,515
26	Furniture, cabinet	,,	,,		9,166	25,104	,,	,,		849	2,156	,,	,,		10,060	36,196
27	Glass, all kinds	,,	,,		10,712	27,233	,,	,,		5,489	10,183	,,	,,		12,909	40,860
28	Grease and tallow	No account.					,,	,,		7,260	11,368	,,	,,		530	893
29	Haberdashery and millinery	No separate account.					No separate account.					No separate account.				
30	Hardware, general	United States			46,381	176,738	United States			33,370	131,765	United States			75,970	214,150
34	Leatherware, all kinds	,,	,,		22,388	123,112	,,	,,		2,605	97,275	,,	,,		13,545	107,519
—	Leather, all kinds	,,	,,		105,268	155,289	,,	,,		65,019	159,842	,,	,,		36,214	131,484
37	Machinery, all sorts	,,	,,		417	10,132	,,	,,		3,100	29,570	,,	,,		18,321	54,816
39	Medicines	,,	,,		2,125	32,641	,,	,,		3,683	30,329	,,	,,		10,775	45,835
41	Musical instruments	No separate account.					No separate account.					,,	,,		6,678	17,578
44	Painters' colours	United States			7,337	29,432	United States			5,584	21,472	,,	,,		1,097	26,157
45	Paper, writing	,,	,,		1,288	1,782	—			—	—	,,	,,		4,498	36,486
48	Plate and jewellery	,,	,,		1,758	11,781	United States			1,000	4,202	,,	,,		2,385	4,644
49	Provisions, not otherwise described:—															
	Bacon and hams	,,	,,		18,462	28,283	,,	,,		15,132	29,455	,,	,,		19,539	39,130
	Beef and pigs' heads	,,	,,		80,976	98,622	,,	,,		212,226	254,232	,,	,,		155,097	206,798
	Pork	,,	,,		244,384	376,492	,,	,,		267,709	393,464	,,	,,		12,681	396,929
56	Soap	,,	,,		12,250	34,475	,,	,,		8,884	22,191	,,	,,		2,360	38,290
57	Spirits:—															
	Brandy	,,	,,		120	21,748	,,	,,		60	15,938	—			—	9,561
	Cordial	—	—		—	—	—	—		—	—	—	—		—	—
	Rum	United States			6,195	68,788	United States			1,385	27,176	United States			—	15,286
	Whiskey	—	—		—	12,871	—	—		—	15,987	—	—		—	20,718
61	Sugar, refined	United States			18,600	25,194	United States			3,000	6,270	United States			220	11,090
64	Wood, &c.	,,	,,		17,000	55,000	,,	,,		6,700	16,351	,,	,,		11,850	33,000
21	Indian corn	,,	,,		2,999	3,648	,,	,,		3,076	6,657	,,	,,		4,216	5,547
51	Salt	,,	,,		194,417	232,174	—			130,551	157,931	—			75,771	112,751
—	Flour	,,	,,		991,317	1,634,805	United States			512,750	1,313,586	United States			389,952	1,351,428
21	Indian meal	,,	,,		9,432	14,484	,,	,,		6,583	17,734	,,	,,		7,538	14,468

BERMUDA.

No. 3.

ACTING-GOVERNOR MOORE to MR. CHAMBERLAIN.

(Received July 8, 1896.)

SIR, Bermuda, June 22, 1896.

I HAVE the honour to transmit herewith a report which has been prepared by the Receiver-General of this Colony, with its enclosures, furnishing, as far as it is practicable to do so, the information asked for in your Despatch General, dated the 28th November last, respecting the extent to which foreign imports of any kind have displaced, or are displacing, in this Colony similar British goods, and the causes of such displacement.

2. The packages containing specimens of goods, &c., have been forwarded, according to your instructions, direct to the Secretary, London Chamber of Commerce, Eastcheap, London, E.C.

I have, &c.,
E. C. S. MOORE, Lieut.-Colonel, R.E.,
Officer Administering the Government and
Commander-in-Chief.

Enclosure in No. 3.

Receiver-General's Office, Bermuda,
SIR, June 9, 1896.

REFERRING to the Despatch (General) of the Secretary of State for the Colonies, dated 28th November 1895, relating to the extent to which, in each of the Colonies, foreign imports of any kind have displaced, or are displacing, similar British goods, and the causes of such displacement, I have the honour to furnish returns showing for the years 1884, 1889, and 1894 :—

(*a.*) The value of all articles, specified in the classification annexed to the Despatch, imported into this Colony from foreign countries, the value of which was 5 per cent. or upwards of the total value of the articles imported into this Colony from all sources, whether within or without the British Empire, and when the value of that article imported was not less than 500*l.*

(*b.*) The reasons, so far as they can be obtained from official and other sources, which may have, in each case, induced the Colonial importer to prefer a foreign article to similar goods of British manufacture.

These reasons have taken the shape of a report on each article, separately, of which the foreign import exceeded 5 per cent. of the whole import, and of which the total value imported was not less than 500*l.*, as defined above.

2. It will be noticed that the articles imported from the United States of America far exceed in value those imported from any other foreign country, and consist, in a great measure, of animals such as horses, oxen, cows, and sheep—most of the oxen being imported by contractors for supplying beef to Her Majesty's Naval and Military Forces in this Command ; of flour and its various manufactures ; of smoked and salted provisions, such as hams, bacon, and beef ; of cheese and sugar, and indeed of almost every variety of articles used for food.

3. The trade of this Colony with the United States in such articles as those named in the previous paragraph has always been large, and was developed long before the fact came to be realised that many similar articles were produced by the neighbouring Dominion of Canada

The reasons for the trade connexions between this Colony and the United States may briefly be stated as follows :—

(*a.*) The fact that many natives of this Colony having established themselves in New York, it followed that close business relations were formed between them and their friends here.

(*b.*) The proximity of this Colony to the United States, and the frequent and rapid communication with New York by steamships, which run every 10 days, and at shorter intervals during the crop season, enables importers, particularly grocers, of whom there are a great many here, to renew their stock of perishable articles frequently by importing small quantities at a time, and

thus to avoid the deterioration which would otherwise take place during the summer.

(*c.*) New York is a market where everything ordinarily in use can be obtained, for the most part, at reasonable rates; and by way of encouraging trade local agents are employed by New York firms to travel about the country soliciting orders.

4. Among the articles imported from the United States which come into competition with similar articles of British manufacture may be mentioned chiefly:—

(*a.*) Cotton goods, which consist of the articles mentioned in separate report, List number 23, the reasons for the preference over similar British articles are there detailed at length, and patterns supplied as required.

(*b.*) Hardware.—The probable causes for the preference given to this commodity are stated in separate report, List number 30, and an ample catalogue of prices and patterns, combined in one book, is forwarded with the patterns alluded to in the previous paragraph (*a*) to the address indicated in the instructions for filling up returns.

(*c.*) Leather manufactures.—The causes given for the preference to some of these manufactures over similar British goods are explained in separate report, List number 34.

(*d.*) Soap.—The quantity of this article imported from the United States represents more than two-thirds of the whole quantity imported from all sources. This is due, probably, to the reasons stated in separate report, List number 56.

(*e.*) Furniture.—Nearly the whole of this article is imported from the United States, and the principal reasons are stated in separate report, List number 26.

(*f.*) Sugar, refined.—It will be observed that the quantity imported from foreign countries has not increased during the years embraced in the returns, it not having exceeded in either of those years more than one-half of the quantity imported from all sources.

I regret being unable to expand, except in very few instances, the returns under their chief headings by detailed sub-heads as suggested by the Despatch, the necessary information not being obtainable, either by the ordinary Colonial returns or from any other source within my control.

I observe, by paragraph 7 of the Despatch, that Mr. Chamberlain expresses a wish to obtain certain information respecting the products of this Colony, and shall endeavour to be prepared to meet the requirements of the Despatch which he contemplates preparing on this subject.

I do not think there is anything further calling for special comment here.

I have, &c.
J. TUCKER,
Receiver-General.

To the Hon. the Colonial Secretary.

BERMUDA. Years 1884, 1889, 1894.

A REPORT on each ARTICLE separately, of which the FOREIGN IMPORT exceeded 5 per cent. of the WHOLE IMPORT, and of which the TOTAL VALUE IMPORTED was not less than 500*l.*

2. *Animals, Horses.*—The low prices at which horses can be purchased in the United States early in the winter afford buyers an excellent opportunity for obtaining their supplies. The means of transport are also rapid and safe.

Oxen, Cows and Sheep.—The quality of meat imported from the United States has been found superior to that imported from Canada.

3. *Apparel and Slops.*—Such articles as underclothing and children's suitings are included under this head. (Particulars suggested by Annexe 3 cannot be supplied, no official information being given or required.)

7. *Biscuit and Bread.*—Bread, namely pilot, in barrels, sweet biscuits in wooden boxes, and sometimes in tins, are the principal kinds imported, and the facility with which these can be obtained from New York affords importers opportunities of frequently renewing their stock.

BERMUDA.

The description of biscuits imported from the United Kingdom is that chiefly manufactured by Huntley and Palmer, contained in tin boxes, but the price at which they are sold here places them beyond the reach of the general consumer.

9. *Books, Printed.*—It will be noticed that in only one year, that of 1894, the importation of books from foreign countries amounted to 5 per cent. of the total value imported and those were chiefly imported from the United States.

10. *Butter.*—Various grades are imported, the price ranging from 8*d.* to 1*s.* per pound. American butter is preferred to Canadian, the choice qualities of the former being of better colour and keeps sweet in this climate longer than the latter.

15. *Cheese.*—A cheap quality of cheese is imported from the United States ranging from 3*d.* to 5*d.* per pound, and is sold from 8*d.* to 10*d.* per pound.

The high rate of English cheese places it beyond the reach of the people, the retail price being 1*s.* 3*d.* and 1s. 10*d.* per pound.

The quantity of this article imported from Canada is considerable.

19. *Coals.*—Anthracite coal is very generally used for cooking and other stoves and is imported from the United States.

Cardiff coal is nearly all supplied to shipping.

A low rate of freight is given importers from the United States during the crop season by sailing vessels coming here to freight away onions and potatoes.

20. *Cordage and Twine.*—Only a small proportion of these articles were imported from foreign countries.

21. *Flour.*—Principally imported from the United States. Various grades are imported, the quality chiefly used here costs at present about 15*s.* a barrel of 196 pounds, and is sold about 20*s.* the barrel. No quotation can be given for Canadian flour, there being very little imported, it not being found to keep well in this climate.

23. *Cotton Goods.*—Under this heading such articles as sheeting, table cloths, dress materials are classed. About one-third of the above description of goods are imported from the United States and are preferred to goods answering this description from the United Kingdom for the following reasons, that is to say:—

(*a.*) The prices are less.
(*b.*) The quality, though not superior, seems to satisfy the consumer.
(*c.*) The dyes are considered faster and the patterns in greater variety.
(*d.*) No charge is made in the United States for packing.
(*e.*) Plain white cottons are manufactured without filling, which affords the consumer a better opportunity of judging of the quality and are easier to work.

The costs attending the importation of such goods from the United Kingdom exceeds by 5 per cent. those on similar goods imported from the United States. No doubt the cost of transport forms an important factor in this excess.

Patterns are sent with full particulars recorded on them, as required by paragraph 6 of the instructions for filling up returns.

24. *Earthenware.*—Drain pipe. Flower pots are included here. Very little being imported from foreign countries.

25. *Fish, Preserved.*—Codfish, herrings, mackerel, are included here,—about one-fourth of the quantity only being imported from foreign countries.

26. *Furniture.*—Furniture from the United States is generally used here, being moderate in price, and consequently within the means of the people.

27. *Glassware.*—Lamp chimneys and fittings. Glass lamps and glass ornaments are included,—about one-half of the quantity being imported from the United States.

No information under letters "*a*" to "*d*" can be furnished.

30. *Hardware.*—No official means exist for obtaining information under subdivisions A. to E. About one-half of the hardware is imported from the United States. This may be accounted for partly by the proximity of that country to this Colony, and the frequency of communication, and partly by the facilities for selection offered by the trade catalogues of prices and patterns combined in one book, a copy of which will be forwarded to the address indicated in paragraph 7 of Instructions for filling up the Returns, and will, I presume, render it unnecessary to forward patterns in any other

form. This book contains more information than it would be possible to supply by sending such patterns as could be procured here.

A great many bicycles are imported from the United States, many of them being brought here by visitors from that country during the winter months, most of which are taken away by the importers. A considerable number is also imported for the use of inhabitants of the Colony.

The average cost is 10*l.* and the selling price 15*l.* to 20*l.* each.

32.—(*a.*) *Implements and Tools of Industry.*—The tools are principally for use in agriculture, only about one-fourth being imported from foreign countries.

34. *Leather Manufactures.*—About one-half of the quantity of leather manufactures is imported from the United States, and consists chiefly of boots and shoes, the style and finish of which are generally accepted as being more in keeping with the requirements of fashion than those obtained elsewhere.

37. *Machinery.*—The quantity included in years 1884, 1894, comprises principally soda-water and ice machinery plant.

Numbers of sewing machines are also imported from the United States, being sold from 1*l.* 10*s.* to 3*l.*

38. *Manures.*—Principally imported from the United States, and used for onion and potato culture, being specially prepared for these vegetables.

39. *Medicines.*—Principally patent medicines, chiefly imported from the United States.

40. *Metals.*—One-fifth only of the quantity was imported from foreign countries. No official means exist of obtaining information under the various sub-divisions.

41. *Musical Instruments.*—Small organs and pianos, about one-third being imported from foreign countries.

44. *Painters' Colours and Materials.*—These comprise oils, paints, and varnish.

A great deal of American varnish is imported.

Paints are principally imported from the United Kingdom.

48. *Plate and Plated Ware.*—Not more than one-third is imported from foreign countries.

49. *Provisions.*—Bacon, hams, beef, and pork are here included. Dealers can renew their stock from the United States every ten days, the facilities of communication admitting of this being done.

The price of bacon is 4½*d.*, and of hams 5½*d.*, and are sold at 8*d.* and 9*d.* per pound respectively. English bacon and hams are sold at 1*s.* 3*d.* and 1*s.* 6*d.* per pound respectively.

52. *Seeds.*—Two-thirds of the seed imported here consists of onion-seed from foreign countries, the remainder being vegetable and flower-seeds principally from the same source.

56. *Soap.*—Principally imported from the United States.

Premiums are offered to purchasers of certain quantities, and consist of lamps, pictures, light road waggons, and other useful articles.

The soap is put up in small packets of coloured paper which makes it attractive. Soap imported from the United Kingdom is put up in long bars, and although of better quality, the absence of premiums causes it to be in less demand.

57. *Spirits, Whiskey.*—Whiskey manufactured in the United States, such as "rye," is imported here, and principally consumed in the hotels during the season for American visitors.

58. *Stationery.*—A little over one-third of the quantity imported is from foreign countries, principally the United States.

61. *Sugar, Refined.*—About one-third of the refined sugar used here is imported from the United States, and is probably due to the facilities offered by frequent communication between that country and this Colony.

J. TUCKER,
Receiver-General.

IMPORTS, BERMUDA. Years 1884, 1889, and 1894.

No.	Commodity.	1884.		1889.		1894.	
		Total Value of Importation.	Value of Importations from Foreign Countries.	Total Value of Importation.	Value of Importations from Foreign Countries.	Total Value of Importation.	Value of Importations from Foreign Countries.
		£	£	£	£	£	£
2	Horses	2,252	United States - 811	1,619	United States - 719	1,447	United States - 597
2	Oxen and cows	21,513	Do. - 21,201	26,101	Do. - 26,025	24,230	Do. - 24,066
2	Sheep	2,904	Do. - 2,870	3,918	Do. - 3,908	2,515	Do. - 2,461
3	Apparel	3,605	Do. - 316	4,056	Do. - 834	4,568	Do. - 263
7	Biscuit and bread	—	- - - -	856	Do. - 771	2,243	Do. - 1,982
9	Books	—	- - - -	—	- - - -	708	Do. - 409
10	Butter	8,109	United States - 7,993	8,948	United States - 8,863	11,008	Do. - 10,747
15	Cheese	1,650	Do. - 1,624	1,801	Do. - 1,762	3,070	Do. - 2,731
19	Coals	1,106	Do. - 801	1,710	Do. - 1,452	2,263	Do. - 1,540
20	Ship cordage and twine	—	- - - -	—	- - - -	521	Do. - 164
21*b*	Flour	15,590	United States - 15,571	17,555	United States - 17,505	12,710	Do. - 12,233
23	Cotton goods	23,486	Do. - 5,650	31,257	Do. - 8,095	25,278	Do. - 6,450
24	Earthen and chinaware	1,444	Do. - 345	936	Do. - 163	1,112	Do. - 362
25*b*	Fish, preserved	1,159	Do. - 883	3,578	Do. - 621	3,754	Do. - 949
26	Furniture	5,128	Do. - 4,476	2,914	Do. - 2,290	3,558	Do. - 2,701
27*d*	Glassware	1,689	Do. - 992	1,389	Do. - 702	1,918	United States - 856
							Austria - - 61
30	Hardware	7,625	Do. - 5,316	6,245	Do. - 3,555	4,083	United States - 2,443
30	Cycles	—	- - - -	—	- - - -	539	Do. - 452
32*a*	Agricultural	513	United States - 139	Nil	United States - Nil	—	- - - -
34	Leather manufactures	9,359	Do. - 4,380	7,651	Do. - 4,741	9,616	Do. - 4,666
37	Machinery	1,102	Do. - 881	—	- - - -	1,736	Do. - 1,251
38	Manure	1,685	Do. - 1,539	2,290	United States - 2,274	2,708	Do. - 2,687

39	Medicines	2,128	United States	1,399	3,186	United States	2,486	3,630	United States	2,426
40	Metal manufactures	—	- - -	-	—	- - -	-	1,116	Do.	279
41	Musical instruments	1,211	United States	977	1,570	United States	1,324	742	Do.	256
44	Painters' colours and materials	1,186	Do.	607	1,085	Do.	588	1,560	Do.	739
48	Plate and plated ware	}							Do.	654
48	Ditto	1,726	Do.	1,337	1,327	Do.	684	2,047	France	18
48	Ditto	}				Germany	52	}	Germany	91
49	Provisions	10,058	Do.	9,426	10,002	United States	9,952	12,823	United States	12,715
52	Seeds	} —	- - -	-	—	- - -	-	973	Do.	297
52	Do.	}							Teneriffe	654
56	Soap	1,521	United States	1,103	1,353	United States	1,254	2,883	United States	2,300
57	Spirits—Whiskey	1,278	Do.	114	1,482	Do.	182	2,582	Do.	316
58	Stationery	1,311	Do.	483	1,474	Do.	944	1,847	Do.	788
61	Sugar, refined	8,033	Do.	3,858	11,324	Do.	5,377	8,828	Do.	3,586

J. TUCKER,
Receiver-General,
Bermuda.

BAHAMAS.

No. 4.

SIR W. F. HAYNES SMITH to MR. CHAMBERLAIN.
(Received July 20, 1896.)

Government House, Nassau,
July 4, 1896.

SIR,

I HAVE the honour to acknowledge the receipt of your Despatch of the 28th November last, on the question as to the extent to which, in each of the Colonies, foreign imports of any kind have displaced or are displacing similar British goods, and as to the causes of such displacement.

2. The public records of the colony do not, unfortunately, give the particulars necessary to compile the returns in the full details which are called for in your Despatch as many of the articles specified in Annexe 1 of the Despatch have been included under one heading, namely, that of articles on which *ad valorem* duty is paid. I endeavoured to compile the information from examination of the original customs entries, but I found that many of these entries had been destroyed, and that any returns compiled from them would have been incomplete. I regret to say, therefore, that I am only able to submit returns giving the required information as to some of the articles specified, and a return in full detail of the importations during last year.* I have the honour also to forward various samples, which, as directed, have been sent to the Secretary of the London Chamber of Commerce, under the Bill of Lading enclosed. I attach a list of the samples so sent.†

3. Less than one-fourth of the total import trade of the colony is with the United Kingdom. About three-fourths of the import trade are with the United States of America, and the proportion is increasing. The causes for this state of things are that the articles required in daily life by the bulk of the labouring population are produced more cheaply in the United States than in the United Kingdom, taking the absolute prime cost to the buyer, and that the articles themselves of similar grade are better in quality and design, and are more conveniently packed. The wants and convenience of the consumer (which are sometimes forgotten) ultimately decide what he will buy; and in order to place before you the reasons which influence the Bahamian in purchasing from the United States of America, rather than from England, most of the articles required in daily life by himself and his family, from their cradles to their graves, I would ask you to accompany me to one of their homes.

4. On entering I find the housewife dressed in a print gown, and if it is of neat pattern it is American. If she is asked why she buys the American prints in preference to the English, she will say she gave up buying English prints some years ago when she found the device of sizing the prints was increasing, and that the patterns of the English make were extremely ugly, and stamped on colours which were not fast, and that they all washed out, and the fabric itself tore in washing or fell to pieces. She may, perhaps, have some remnants of the English prints, and will point out how superior in texture, in appearance and taste, the American cheap prints are to the English. I am sending patterns of the two classes of these goods, with the price of each marked on them, to illustrate the correctness of her judgment. The next thing which strikes one is her boots, which are of the prevailing fashion, with pointed toes, and were purchased for 3*s.* to 1$ or 4*s.* 2*d.* a pair. She brings out some more boots of her husband's at the same price, and others of her children at a less price, all of good appearance, and each pair put up separately in a good box. These boots are a marvel of cheapness, and I send several samples to show how cheap and excellent they are. On inspecting them, one understands why it is that British goods are entirely displaced. It is the same with all articles of female dress. Cheap stockings of good and fast colours are purchased in America, but are supposed to have come from Germany, at prices varying from 60 cents. or 2*s.* 6*d.* per dozen pair. I have been shown corsets of various makes, and I send samples showing the cheapness and the neatness with which they are made in America, contrasting strongly with the coarse and repulsive article from England at a similar price. All the underclothing and the children's cotton-clothing are made from cotton manufactured in America and sold at from 2*d.* per yard. This cotton is a strong and serviceable material without sizing. I send samples to demonstrate why the cheap British cottons have been displaced by the American.

* Not printed, as it does not specially illustrate the question.

† Not printed.

5. Turning to her husband's clothes, the cloth and woollen material come from the United Kingdom, and, like so much of the cheap British exports to the West Indies, seem to be made wilfully nasty. She directs attention to the English Oxford shirting, and points out what rubbish it is. Large quantities of this article used to be imported, but it has been entirely driven out of the market by the superiority of the cheap American shirting. I send several samples of the different qualities.

6. The various articles required for the children are in like manner procured from America at less prime cost than they can be purchased in England; and if the two were the same price, the American article is better in design and more sightly.

7. On looking at the cottage itself, I find that the lumber and shingles come from America, and the fastenings and fittings too are manufactured in the United States, from the pot on the fire to the clock on the wall; and as to all the same remark applies—each such article is less in price and better in quality and design.

8. On asking her where the food of the family comes from she points to the flour, corn meal, grits and hominy brought from America, and to the lard and salted meat from the same place. She will show you, too, the neatness of the packages in which these things are put up so that they can be placed in her room without making it untidy. The quarter barrel is a particularly neat package.

9. The lamps in the room are American, and the kerosine oil in them is drawn from the can in the corner, which bears the familiar mark of the Standard Oil Trust.

10. Having gone over most of her humble surroundings, I ask her if she will take me to her husband and her brothers and let me see what tools they use in their several occupations, and she takes down her hat, which you at once see from its trimmings must be English. Trimmed hats of this class are cheaper in England than in America; but they declare themselves to be cheap, and the object seems to have been to make them ugly. In America, on the contrary, the manufacturers of cheap articles of dress make the articles attractive and pleasing to the eye.

11. I do not lengthen this Despatch by drawing attention in detail to the superiority of many of the appliances used in the various employments and trades; but I have caused a selection to be made of the most important of the tools and implements used by labourers, farmers, woodsmen, carpenters, blacksmiths, shipwrights, and others which are procured from America in preference to Great Britain because they are better adapted for the uses for which they are required and are better in temper and quality. The builders of the colonial craft, numbering some 800 or 1,000 vessels, state that they purchase American cordage in preference to the English because they find the American better in quality.

12. The information given would be repeated in thousands of working homes throughout the colony and, I believe, in hundreds of thousands of such homes throughout the West Indies. Full details as to the specific reasons why each of the articles mentioned is purchased from America are given in the particulars furnished in the report on each separate article. What has been said as to articles of dress applies exclusively to such articles as are used by the working classes and are cheap. In the higher grades of dress the English goods are the cheaper of the two. If, however, the information is correct, the matter is of importance as tending to establish that a large proportion of the necessary articles required in their daily life by the working population of the world can be produced more cheaply in the United States than in the United Kingdom. The samples sent will enable those, who are competent to judge in such matters, to determine whether the consumers are right in their selection of these American goods in preference to those of English make, at the same price.

13. I have hitherto only alluded to articles of which the actual first cost is less in America than in the United Kingdom, apart from any question of transport or charges; but there is another large class of articles of common use in which, although the price may be slightly higher in America, the American article is preferred, because the articles are better in design, and are packed, or put up, in a form which is more convenient for the consumer. I have made numerous inquiries amongst the largest traders in the colony and they all make similar statements on this head. Everyone has had special grievances with his English correspondents which he has tried to have remedied; and it has been because the home merchants would not meet their requirements that they have gone to the American merchants.

14. This is especially the case in the hardware trade, and I may illustrate the matter by the statements of one of the colonial merchants. He used to import all locks from England. They came out tied in paper, and by the time they arrived the locks and keys were all mixed together in confusion, and it took a clerk many hours of labour to

sort them. He complained about it and showed how the Americans put up each lock in a separate box, but the answer he received was merely that the English merchant was surprised to hear he was not satisfied. The business of the colony in locks was gradually transferred to America. The English key to a common lock is so heavy and large that no one would willingly carry it in his pocket when he can obtain the more convenient American key. Similar statements were made as to numerous other articles. The convenience and wants of the local trader and of the consumer received no attention.

15. Every merchant of the colony I have consulted on this subject has some anecdote to relate as to the mode in which his business has been injured by the indifference of the home merchants. Frequent applications have been made during the past years to obtain better patterns for prints and more reliable shirtings, but one and all have stated that the only reply they have received is that the English merchant is surprised to hear they were not satisfied. One merchant had built up a steady trade in a small way for the better kinds of English boots, when the English merchant took to sending out boots which did not match, and on being remonstrated with said he was surprised to hear the colonial merchant was not satisfied, as the goods supplied were samples which had been accumulating for some years, and that they were worth more than the boots ordered. I presume, however, that such sorry action as to palm off unsaleable goods, which could only have been of use if the colonists had lop-sided feet, is an extreme instance even for those who supply the small colonies. All the colonial merchants state, too, that when any mistake occurs in filling an order the English merchant will make no allowance except under legal procedure, while the American merchant at once assumes all liability for any loss arising from such mistake.

16. Attempts have been made on occasions to open a trade in English goods with Cuba, and this might well be done with prospect of success. Those who have tried it, however, have told me that they found the English merchants would not take the trouble to suit the goods to the requirements of the special market, and the attempts have failed.

17. As regards other imports which could be more advantageously obtained from England than America, the balance is often turned against the English goods in consequence of there being no direct communication with England. All goods have, therefore, to be forwarded through the United States, and, although the cost of transport to the United States from England is cheap, the freights are high on the latter portion of the journey. To maintain this insufficient communication the colony paid last year 3,500*l.* in subsidies.

18. I may, perhaps, allude here to a matter which I have watched with attention, namely, the manner in which the English carrying trade to many of the places on the Spanish Main, and in Hayti and Porto Rico, has been driven out by the German steam lines, which are worked most economically. The whole of this carrying trade was performed by British steamers not so very long ago, but they have been displaced in consequence of the German lines paying attention to the convenience of those who had goods to ship, and to the managers of the lines laying themselves out to meet the wants of the shippers.

19. The cost of exchange and the trade charges are less on trade with the United States than with England, and the American wholesale merchant appears to give himself trouble to inform the colonial trader of the goods most likely to attract and yield him a profit while meeting the wants of the consumer.

20. The total trade of the colony is only a small matter, but the reasons why the English goods have been displaced so largely by American manufactures may perhaps apply over a wider area.

I have, &c.,
W. F. HAYNES SMITH.

Enclosure in No. 4.

I* have the honour to forward herewith a return of importations into the Colony of the Bahamas for the years 1884, 1889, and 1894, Annex 1, prepared in conformity with the instructions contained in the Secretary of State's Despatch, dated November 28th, 1895.

(1.) I would respectfully state, for the information of his Excellency the Governor, that the Blue Book Return of Importations, the only official record of information on

* Report not signed.

the subject, is compiled from importers' entries, and the information given by these entries respecting the description of goods imported is limited to the requirements of the tariff. Articles paying a specific duty are enumerated, and the quantity and value of each article are stated. Articles paying an *ad valorem* duty are not enumerated, and the description of the article is not more definite than will admit of its being classed under one of the following heads, viz., (1) food and drinks, (2) textile, (3) metal, (4) other.

Such being the case, it follows that but few of the articles enumerated on the list, Annex II. of the Despatch, can be included in the present return. The number is further reduced by the omission of articles of which the total value imported is less than 500*l.*

It will be noted that the larger portion of importations is from the United States; not that the American article is in every instance preferred to the British, but the trade conditions are such as to influence the trade in favour of the United States. Those conditions are as follows:—

(1.) There is direct steam communication with the United States, none with other countries.

(2.) Transport and trade charges are less. Freight from the United Kingdom *viâ* New York is 30*s.* per ton weight, 30*s.* and 35*s.* per ton measurement, with ten per cent. primage; as compared with 16*s.* 8*d.* per ton weight and 16*s.* 8*d.* per ton measurement, with five per cent. primage, from New York, payable in Nassau on the delivery of goods. Most British articles are subject to railway and other charges from place of production to port of shipment.

(3.) Packages and packing are charged for in England; with the bulk of American goods packages are free.

(4.) Premium on exchange payable in London is two per cent.; payable in New York one per cent.

(5.) Marine Insurance from England is one per cent.; from New York $\frac{5}{8}$ per cent.

(6.) Stocks can be replenished from New York in two weeks as compared with from six to eight weeks from England. Such being the case the trader with limited capital can deal to greater advantage with the United States—(1) his capital can be "turned over" more often, (2) a larger number of articles can be dealt in, and fewer of each will be required.

Small quantities of various articles are frequently ordered from New York to prevent stocks running out before the arrival from the United Kingdom of similar articles.

(7.) There is greater facility in obtaining credit in the United States than in England. The American merchants trading with the Bahamas frequently visit Nassau, they form the acquaintance of the traders and gain a knowledge of the requirements of the trade, and are ready to adjust all differences arising out of goods sent contrary to order, &c.

Such are not the conditions under which trading is carried on with the United Kingdom. The Nassau trader and English merchant are ignorant of each other, and the latter appears to be equally ignorant of the "trade." This ignorance is manifested by sending with almost every shipment goods which prove to be unsaleable, being unsuited to the climate and the consumer. This difficulty is to some extent mitigated by the fact that a number of English houses send samples of their wares to the Nassau trader, from which selections can be made, but, owing to the time that must elapse before the order can be placed in England, the patterns selected are sold and others are substituted, in most cases this means a substitution of loss for profit so far as the trader is concerned.

(8.) There is practically no wholesale trade (other than in spirits); any trader say with 20*l.* capital has no difficulty in having his order executed in the United States. The Customs regulations here are very simple. The ease with which credit can be obtained in the United States, and the absence of all difficulties on this side, have led to a large increase in the number of retail importers, to the exclusion of the wholesale. This tends to shut out many articles of British manufacture which could be imported to greater advantage from England if dealt in in large quantities.

BAHAMAS. The following is a list of the articles of foreign manufacture which are superseding similar goods of British make, owing to defects in the latter or to the higher cost of production in the United Kingdom, viz.:—

Cotton Manufacture.—Piece goods—white, plain and printed, low grades *only*, say from 1½*d.* to 3*d.* per yard.

Leather.—Boots and shoes—all qualities.

Hardware.—Edge tools, saws, files, nails. The reasons which have induced the colonial importer to prefer the foreign to the British article will be given in report on each article forwarded herewith. For reasons stated to your Excellency I am unable to give any information respecting No. 9, Books, printed, and No. 37, Machinery.

No. 2. *Animals.*—Cattle. Usually imported from Cuba; when that island is in a state of insurrection the trade is shifted to the United States, being, next to Cuba, the cheapest and most accessible market from which cattle can be obtained.

No. 6. *Beer and Ale.*—Only a very light beer, known as Lager, is imported from the United States and Germany. Of all other qualities of beer and ale the British article is preferred.

No. 7. *Biscuit and Bread.*

No. 10. *Butter.*

No. 15. *Cheese.*

No. 21. *Corn*:—(*a*) Wheat flour; (*b*) Indian corn; (*c*) Corn meal and hominy.

No. 49. *Provisions.*—(*a*) Lard; (*b*) Meat, fresh and salted; (*c*) Potatoes.

In the absence of direct communication with Canada, all of the above articles can be more cheaply obtained from the United States. The prime cost is less, transport and trade charges are less.

Small quantities of the better qualities of biscuits and cheese are imported from the United Kingdom; the difference in quality does not admit of a comparison of prices of British and American articles.

(*d.*) *Rice.*—The importation from Germany in 1894 is due to the endeavour on the part of an individual with German connections to establish a trade with the Bahamas, and not to any preference on the part of the importer for the German article. The rate of freight from Hamburg *viâ* New York to Nassau is the same as from Liverpool.

Very little of the rice stated by importers to be from the United States is the product of that country. The prime cost of the American article is too high for it to be generally used. Nor is New York so cheap a medium for obtaining East Indian rice as is Liverpool. There is reason to suppose that the larger portion of the rice entered at the custom house as imported from the United States should have been entered from the United Kingdom *viâ* the United States.

No. 20. *Cordage.*—American manilla rope is preferred to the British. The American rope is smoother laid and more pliable; it seems to be made up with a larger quantity of grease, and does not dry up so quickly as does the British article. Samples forwarded.

No. 23. *Cotton Manufactures.*—(*a*) Piece goods, white and plain.

The low grades of the British article (prime cost, say, 1½*d.* to 3*d.* per yard) are too much sized.

After repeated suggestions the English manufacturers are now making a line of goods not so heavily "dusted." The British article of to-day may be as good in quality as the American, but it will take time for the prejudice against it to be removed and for the British article to recover possession of this market.

Ditto. Printed, checked, or dyed.

Prints for dresses (prime cost, say, 1½*d.* to 3*d.* per yard). The English article is sized, the colours are not fast, and the patterns are not attractive. One of the largest importers states "that the American print is infinitely superior in quality and unsurpassed in design when compared to the hundred-year-old design and sized up print of English manufacture; the last English prints I imported spotted in my store, and I have not used English prints for many years."

Oxford stripes or shirtings, blue denims and cotton drills of English manufacture are also being superseded in this market by similar articles of American make, for the same reasons as above.

Hose and half-hose are being imported from New York at about the same prime cost as from the United Kingdom; the goods are marked "Made in Germany," but are not shipped in bond from the United States. Colours of the lower grades are preferred to the British article. Samples forwarded.

No. 26. *Furniture.*—A very limited quantity is imported for trade. Anyone wishing to furnish a house imports his own furniture and does so from the United States. No comparison can be made with the British article, the latter not imported. The difference in cost of freight and packing is sufficient to exclude the latter. The American article is neat and slight, but not durable,

No. 29. *Haberdashery and Millinery.*—All articles of British manufacture (with the exception of corsets) preferred to the American. American-made corsets have superseded those British made, as they cost less and are more stylish. Samples forwarded.

No. 30. *Hardware.*—English hardware is at a discount in most instances owing to the fact that when the trade was in the hands of the English merchants the cheapest and lowest class of goods was shipped to this market. Articles that no respectable manufacturer would put his name on were the only ones to be obtained; when the American-made article was introduced, the difference in quality was at once obvious. The result is that many articles of British make will be refused by a purchaser for no other reason than that it is British and not American.

The importers prefer the American article—

1. Owing to the lower rate of freight and other trade charges.
2. The American manufacturers keep them supplied with illustrated catalogues from which selections can be readily made.
3. The American goods are put up in handy cardboard and wooden boxes, properly labelled, leading to a great saving of time in the serving of customers. The English goods are wrapped in paper and tied with string, and the label is usually on the side out of sight and not on the end of the package. No extra charge is made for packages.

It is claimed that the following named articles of American make—samples of which are being forwarded—are superior in quality and finish to similar articles of British make, viz.:—

(*a.*) *Files.*—Said to work more easily, cut better, last longer, and is 30 per cent. cheaper than the British made file.

(*b.*) *Saws.*—Price for price are better than those of British make.

(*c.*) *Edge-tools.*—Such as chisels, axes, hatchets, and adzes, if not better in quality are certainly more finished and of better shape than the British.

Nails.—American cut. Flat headed and of thinner shape, is driven with greater ease, and has entirely superseded those of English make; it is also used instead of and has superseded the English rose-head nail.

American wrought clinch nail, costing 10*s.* 5*d.* per 100 lbs., has nearly superseded the English-wrought clasp which costs 31*s.* per 100 lbs.

American galvanized boat—has superseded the English Bermuda pattern, being of lighter make and is more easily driven; it is also used in the place of the English-wrought counter-sunk clout nail.

No. 34. *Leather.*—Boots and shoes.—Samples forwarded.

No. 1. Women's button boots, Nos. assorted from 3 to 8, prime cost 62c. to 65c., less 2 per cent. for cash.
No. 2. Women's kid oxford shoe, Nos. 3 to 8, cost 65c., less 5 per cent. for cash.
No. 3. Men's congress gaiters, Nos. 6 to 11, cost 85c., less 2 per cent. for cash.
No. 4. Men's lace balmorals, Nos. 6 to 11, cost from 85c. to $1, less 2 per cent. for cash.
No. 5. Men's brogans, Nos. 6 to 11, cost 75c., less 2 per cent. for cash.

No charge is made for cases, and goods are delivered on board ship at New York.

BAHAMAS.

In addition to the qualities of which samples are sent, better qualities are imported ranging in price to $2 for women and $3 for men. About three-quarters of the total value imported is of the lower grades.

It is estimated that total value of importation amounts to 4,000*l.*, about 10 per cent. of which is from the United Kingdom, principally of the better class of goods. The trade and other charges on goods from England amount to more than twice the amount of charges on those from America.

No. 38. *Manure.*—The article imported is specially manufactured in the United States as a fertilizer for exhausted pine-apple soil. No similar British article is known in this market.

No. 57. *Spirits.*—Gin. This article is of German make and is imported *vid* the United States and United Kingdom. It is of the poorest quality, costing about 1*s.* 10*d.* per gallon in wood, and 3*s.* 10*d.* per case of 12 flasks containing 1⅛ gallons. No gin of British manufacture can be had at above prices. Whiskey. A very small quantity of Rye Whiskey of superior quality is imported from the United States; the British article is preferred.

No. 61. *Sugar, refined.*—Imported from the United States and used principally in preserving pine-apples. The present fruit is shipped to the United States, and no duty is levied in that country on the cost of any article of American manufacture that has been used in their preparation. This leads to the importation from the United States of the tins, solder, cases and sugar used in the preparation or preserving of the fruit.

No. 63½. *Wines.*—The importation from the United States was made by the lessee of the hotel, who gets all of his supplies from that country.

Return of Importations into the Colony of the Bahamas for the Years 1884, 1889, and 1894, showing Values from Foreign Countries.

—	Commodity.	Imported in 1884.		Imported in 1889.		Imported in 1894.	
		Total Value of Importation.	Value of Importations from Foreign Countries.	Total Value of Importation.	Value of Importations from Foreign Countries.	Total Value of Importation.	Value of Importations from Foreign Countries.
2	Animals :— Cattle	£ 610	*a.* United States £ 530 *b.* San Domingo 80 610	£ 1,842	Spanish West Indies £ 1,842	£ 2,706	*a.* United States £ 857 *b.* Spanish West Indies 1,849 2,706
6	Beer and ale	1,863	United States 300	1,265	*a.* United States 363 *b.* Germany 82 445	1,217	United States 473
7	Biscuit and bread	885	Do. 834	741	United States 738	836	Do. 745
9	Books, printed	400	Do. 107	616	Do. 116	970	Do. 350
10	Butter	4,345	Do. 4,312	4,384	Do. 4,328	4,836	Do. 4,830
15	Cheese	553	Do. 524	522	Do. 518	708	Do. 678
21	Corn :—						
	b. Wheat flour	19,638	Do. 19,570	20,880	Do. 20,859	20,295	Do. 20,229
	c. Indian corn	582	Do. 559	650	Do. 646	843	Do. 836
	d. Corn meal and hominy	6,332	Do. 6,322	7,367	Do. 7,367	7,070	Do. 7,061
30	Hardware :— Nails	785	Do. 709	642	Do. 552	556	Do. 459
37	Machinery :— Other than steam engines	1,500	Do. 390	845	Do. 654	8,824	Do. 3,618
38	Manure	—	—	1,027	Do. 1,027	1,169	Do. 1,169

IMPORTS, BERMUDA. Years 1884, 1889, and 1894—*continued.*

—	Commodity.	1884.			1889.			1894.		
		Total Value of Importation.	Value of Importations from Foreign Countries.		Total Value of Importation.	Value of Importations from Foreign Countries.		Total Value of Importation.	Value of Importations from Foreign Countries.	
49	Provisions:—	£		£	£		£	£		£
	Lard	2,310	United States	2,300	2,139	United States	2,129	2,382	United States	2,382
	Meat, fresh and salted	9,404	Do.	9,404	10,224	Do.	10,100	8,892	Do.	8,817
	Potatoes	744	Do.	726	477	Do.	418	893	*a.* Do.	860
									b. Spanish West Indies	20
									c. Hayti	10
										890
	Rice	4,209	Do.	1,277	5,820	Do.	1,606	4,754	*a.* United States	220
									b. Germany	152
										372
56	Soap	1,280	Do.	1,053	987	Do.	937	927	United States	840
57	Spirits:—									
	Gin and whiskey	1,3[illegible]1	Do.	290	1,959	*a.* Do.	505	1,742	*a.* Do.	120
						b. Germany	24		*b.* Germany	28
							529			148
	Rum	2,648	Do.	56	3,473	*a.* Spanish West Indies	172	1,663	*a.* Spanish West Indies	61
						b. Germany	24			
						c. Hayti	6			
							202			
6	Sugar, refined	1,776	Do.	1,745	3,304	United States	3,291	1,778	United States	1,675
63½	Wines	887	*a.* Do.	266	735	*a.* Do.	378	804	*a.* Do.	198
			b. Spanish West Indies	6		*b.* Germany	8		*b.* France	16
						c. Spanish West Indies	17		*c.* Germany	10
				272			403		*d.* Spanish West Indies	32
										256

BRITISH HONDURAS.

No. 5.

Sir ALFRED MOLONEY to Mr. CHAMBERLAIN.

(Received June 19, 1896.)

Government House, Belize,
June 4, 1896.

Sir,

I had the honour to receive on the 16th December last your despatch of the 28th of the previous month on the subject of the trade of the British Colonies, which was duly published.

2. With the object of obtaining the information desired by that despatch with a view to ascertaining, so far as this Colony is concerned, whether, and if so, to what extent foreign imports have displaced, or are displacing, similar British goods, the cause of such displacement, and the best means to be adopted to regain any lost trade, I appointed on the 14th January last a Committee of commercial experts with the Collector of Customs as chairman.

3. It is now my duty to transmit the report of the Committee, from which you will observe that without specifying the articles referred to, they generally advance that such preference as locally obtains for foreign to British goods is due as regards the United States of America to their proximity and to regular communication therewith, also to their better suitability to local requirements, and as regards other countries to their cheapness.

Notwithstanding, the Committee are of the opinion that the foreign imports into this Colony, other than provisions, do not from their extent materially affect local British trade.

I have, &c.,
ALFRED MOLONEY,
Governor.

Enclosure in No. 5.

The Honourable Acting Treasurer to the Honourable Acting Colonial Secretary.

Honourable Acting Colonial Secretary, Belize, May 8, 1896.

The Committee have had under consideration the despatch of the Right Honourable the Secretary of State for the Colonies, of date the 28th November 1895, on the question of trade with the United Kingdom, and of the Colonial foreign imports that have displaced or are displacing similar British goods, and the causes of such displacement.

Attached is a return showing for the years 1884, 1889, and 1894 the total value of all articles, where the total value was not less than 500*l.*, classified, imported into the Colony in those years, and the value of each article imported from foreign countries, where the value was five per cent. or upwards of the total value of that article imported into the Colony.

The Committee have been unable to obtain the necessary information to enable them to give the reasons which may have in each case induced the Colonial importers to prefer a foreign article to similar goods of British manufacture, and therefore can only state generally that in cases where a foreign article has been preferred to similar goods of British manufacture, it has been owing, in the case of the United States of America, to the close proximity of the country, frequent and regular communication, and in some cases a preference for the article owing to its better suitability to local requirements.

With reference to similar goods imported from European foreign countries, the cheaper class of goods seems to have been the principal reason.

The Committee have also been unable to obtain information respecting the price delivered in the Colony of the foreign article as compared with the British, or information to enable a report to be made on the other points referred to in the 4th paragraph of the Secretary of State's despatch.

BRITISH HONDURAS.

It is to be borne in mind that in this Colony there is no Chamber of Commerce or other like body where information of the nature desired is available; and private importers can ill spare the time, or care much to furnish from their books the information respecting their dealings.

The Committee are of opinion that the imports, other than provisions, into this Colony from foreign parts, are not of so great an extent as to materially affect British trade.

H. C. USHER,
Acting Collector of Customs,
Chairman.

GENERAL IMPORTS, COLONY of BRITISH HONDURAS, for the years 1884, 1889, and 1894.

No.	Commodity.	Total Value of Importations.											
		1884.				1889.				1894.			
		Total Imports.		Foreign Countries.		Total Imports.		Foreign Countries.		Total Imports.		Foreign Countries.	
		£ s. d.		£ s. d.		£ s. d.		£ s. d.		£ s. d.		£ s. d.	
2	Animals, horses, and mules	1,563 0 0	United States	154 0 0		1,888 2 8		186 0 2		720 5 4		686 4 4	
			Mexico	80 0 0		—		21 5 0		—		18 10 4	
			Guatemala	984 0 0		—		14 3 4		—		—	
			Honduras	245 0 0		—		1,666 14 2		—		8 6 8	
			Jamaica	—		—		—		—		7 4 0	
			Total	1,463 0 0		—		1,888 2 8		—		720 5 4	
3	Apparel and slops	2,366 16 0	France	386 8 0		11,107 18 10		213 15 6		2,571 10 0		188 7 6	
			Germany	258 0 0		—		172 16 8		—		212 2 10	
			United States	161 8 0		—		181 9 6		—		254 8 6	
			Austria	—		—		9 4 2		—		—	
			Spain	—		—		—		—		4 2 4	
			Total	805 16 0		—		577 5 10		—		659 1 2	
4	Arms and ammunition, guns and revolvers.	2,132 4 0	France	23 8 0		1,837 11 2		7 1 8		511 0 2		—	
			Germany	53 16 0		—		23 7 6		—		—	
			United States	82 8 0		—		100 17 4		—		—	
			Guatemala	6 0 0		—		—		—		—	
			Honduras	8 0 0		—		—		—		—	
			Nicaragua	144 0 0		—		—		—		—	
			Belgium	—		—		7 1 8		—		82 4 0	
			Total	317 12 0		—		138 8 2		—		82 4 0	
—	Shot and ammunition.		United States	—		897 17 8		76 15 8		—		—	
			Germany	—		—		5 18 4		—		—	
			Total	—		—		82 9 0		—		—	
6	Beer and Ale	4,169 16 0	Germany	68 8 0		4,190 1 6		285 17 8		3,869 2 10		—	
			United States	925 4 0		—		1,539 9 10		—		2,337 19 3	
			Holland	—		—		29 9 4		—		—	
			Honduras	—		—		—		—		19 8 11	
			Total	993 12 0		—		1,854 16 10		—		2,357 8 2	
7	Biscuit and bread	2,099 0 0	Germany	12 4 0		841 15 8		—		988 15 8		—	
			United States	1,733 16 0		—		814 17 4		—		726 17 10	
			Honduras	2 16 0		—		—		—		—	
			Nicaragua	4 0 0		—		—		—		—	
			Total	1,752 16 0		—		814 17 4		—		726 17 10	
9	Books and stationery.	1,452 0 0	France	80 12 0		931 3 6		—		759 17 6		—	
			Germany	319 4 0		—		45 15 2		—		—	
			United States	169 0 0		—		115 17 8		—		543 12 5	
			Belgium	—		—		39 13 4		—		—	
			Austria	—		—		3 19 4		—		—	
			Total	568 16 0		—		205 5 6		—		543 12 5	

No.	Commodity.	TOTAL VALUE OF IMPORTATIONS.								
		1884.			1889.		1894.			
		Total Imports.	Foreign Countries.		Total Imports.	Foreign Countries.	Total Imports.	Foreign Countries.		
		£ s. d.		£ s. d.	£ s. d.	£ s. d.	£ s. d.	£ s. d.		
9	Books printed	787 0 0	France	28 0 0	766 19 8	25 7 2				
			United States	68 0 0	—	107 13 4				
			Mexico	1 0 0	—	4 10 8	Total imports, under 500*l.*			
			Jamaica	—	—	2 8 2				
			Germany	—	—	2 19 6				
			Total	97 0 0	—	142 18 10	—	—		
10	Butter	3,171 4 0	France	43 12 0	5,181 14 8	89 2 2	550 6 2	—		
			Germany	7 12 0	—	—	—	—		
			United States	2,732 12 0	—	3,977 11 6	—	386 10 5		
			Italy	—	—	97 9 4	—	15 8 8		
			Total	2,783 16 0	—	4,164 3 0	—	401 19 1		
—	Beef and pork	10,271 16 0	United States	10,266 8 0	11,928 15 2	11,913 16 0	9,215 10 8	9,212 19 3		
			Mexico	—	—	1 8 4	—	—		
			Honduras	—	—	—	—	2 11 5		
			Total	10,266 8 0	—	11,915 4 4	—	9,215 10 8		
11	Candles of all sorts.	1,827 0 0	United States	337 4 0	1,011 10 0	462 8 0	277 9 5	58 6 8		
			Mexico	0 16 0	—	58 7 4	—	—		
			Germany	—	—	—	—	20 1 3		
			Holland	—	—	—	—	72 12 8		
			Total	338 0 0	—	520 15 4	—	151 0 7		
15	Cheese	1,537 0 0	France	8 8 0	1,699 14 4	—	328 9 11	0 14 5		
			Germany	6 16 0	—	—	—	9 7 2		
			United States	1,085 8 0	—	1,184 8 10	—	179 19 10		
			Guatemala	5 16 0	—	—	—	—		
			Honduras	4 4 0	—	0 5 8	—	2 9 5		
			Holland	—	—	14 6 2	—	26 15 0		
			Nicaragua	—	—	0 5 8	—	7 17 5		
			Total	1,110 12 0	—	1,199 1 4	—	227 3 3		
—	Cocoa and chocolate.	884 8 0	United States	537 0 0	510 8 6	153 5 8	538 5 5	185 3 8		
			Mexico	1 16 0	—	—	—	6 6 2		
			Guatemala	1 0 0	—	—	—	—		
			Jamaica	48 0 0	—	—	—	—		
			Total	587 16 0	—	153 5 8	—	191 9 10		
—	Coffee	1,217 4 0	United States	249 12 0	1,597 14 4	706 15 6	3,747 14 8	408 19 0		
			Guatemala	914 0 0	—	336 3 6	—	596 12 1		
			Honduras	53 12 0	—	512 8 2	—	2,714 12 2		
			Jamaica	—	—	1 19 8	—	—		
			Brazil	—	—	36 16 8	—	10 16 0		
			Mexico	—	—	—	—	12 6 11		
			Total	1,217 4 0	—	1,594 3 6	—	3,743 6 2		
16	Chemicals and Drugs.	3,672 0 0	France	28 16 0	2,272 3 10	3 2 4	2,129 14 7	15 12 9		
			Germany	70 4 0	—	49 3 2	—	1 17 0		
			United States	1,361 8 0	—	1,032 17 10	—	1,076 6 9		
			Guatemala	2 4 0	—	—	—	—		
			Nicaragua	1 0 0	—	—	—	—		
			St. Thomas	2 16 0	—	—	—	—		
			Honduras	—	—	—	—	1 12 11		
			Holland	—	—	—	—	15 14 10		
			Mexico	—	—	—	—	5 2 11		
			Total	1,466 8 0	—	1,085 3 4	—	1,116 7 2		
—	Confectionery	1,078 4 0	France	6 16 0	638 9 10	—	726 9 8	1 8 10		
			Spain	100 12 0	—	—	—	—		
			United States	125 4 0	—	68 17 0	—	122 14 9		
			Jamaica	1 0 0	—	1 19 8	—	—		
			Total	233 12 0	—	70 16 8	—	124 3 7		

BRITISH HONDURAS.

No.	Commodity.	Total Value of Importations. 1864. Total Imports.	Foreign Countries.		1869. Total Imports.	Foreign Countries.		1894. Total Imports.	Foreign Countries.	
		£ s. d.		£ s. d.	£ s. d.	£ s. d.		£ s. d.	£ s. d.	
—	Cigars - -	1,440 8 0	Germany -	20 12 0	1,608 15 4	24 15 10		748 13 3	—	
			United States	135 16 0	—	239 11 2		—	163 1 4	
			Mexico -	201 16 0	—	735 2 2		—	572 6 6	
			Honduras -	1,028 8 0	—	582 10 8		—	13 5 5	
			Barbados -	—	—	10 12 6		—	—	
			Jamaica -	—	—	8 7 2		—	—	
			Curaçao -	—	—	2 2 6		—	—	
			Porto Rico -	—	—	5 18 4		—	—	
			Total -	1,386 12 0	—	1,608 15 4		—	748 13 3	
19	Coals, &c.: Mineral oil.	1,271 16 0	United States	1,268 12 0	2,216 13 2	2,216 13 2		1,638 19 10	1,638 19 10	
20	Cordage and Twine.	2,632 4 0	United States	637 0 0	3,006 0 6	1,011 7 2		1,775 8 2	281 3 5	
			Mexico -	232 16 0	—	58 1 8		—	—	
			Total -	869 16 0	—	1,069 8 10		—	281 3 5	
21	Corn, Wheat, Flour.	11,482 0 0	United States	11,482 0 0	12,383 13 0	12,378 19 6		8,982 2 0	8,862 19 2	
			Guatemala -	—	—	4 13 6		—	—	
			Honduras -	—	—	—		—	119 2 10	
			Total -	11,482 0 0	—	12,383 13 0		—	8,982 2 0	
23	Cotton manufactures.	40,088 12 0	France - -	49 8 0	45,539 11 0	53 13 10		24,921 9 11	72 0 5	
			Germany -	378 12 0	—	632 5 2		—	31 9 8	
			United States	8,097 8 0	—	7,250 4 4		—	9,423 3 0	
			Switzerland -	—	—	11 6 8		—	—	
			Total -	8,525 8 0	—	7,947 10 0		—	9,526 18 1	
24	Earthenware and Glassware.	2,140 12 0	Germany -	217 4 0	2,999 15 10	214 4 0		1,545 11 6	11 12 6	
			Spain - -	1 4 0	—	—		—	—	
			United States	375 16 0	—	501 7 2		—	135 18 1	
			Mexico -	1 4 0	—	—		—	—	
			Guatemala -	6 0 0	—	18 19 8		—	6 7 7	
			Jamaica -	5 8 0	—	—		—	—	
			France - -	—	—	1 19 8		—	—	
			Belgium -	—	—	94 18 4		—	25 10 3	
			Honduras -	—	—	2 2 6		—	4 4 4	
			Total -	606 16 0	—	833 11 4		—	183 12 9	
25	Fish, salted -	1,760 8 0	United States	1,734 4 0	1,715 14 6	1,679 9 6		782 14 3	767 7 9	
			Mexico -	26 4 0	—	27 18 2		—	6 1 4	
			Guatemala -	—	—	3 10 10		—	—	
			Total -	1,760 8 0	—	1,708 18 6		—	773 9 1	
26	Furniture, cabinet and upholstery wares.	1,495 16 0	France -	67 12 0	960 18 6	7 1 8		775 10 5	—	
			Germany -	78 4 0	—	31 9 0		—	—	
			United States	673 4 0	—	682 13 10		—	282 0 2	
			Guatemala -	14 12 0	—	8 10 0		—	—	
			Honduras -	1 0 0	—	7 4 6		—	—	
			Jamaica -	2 16 0	—	—		—	—	
			Total -	837 8 0	—	736 19 0		—	282 0 2	
28	Grease, tallow, and animal fat, lard.	1,397 0 0	United States	1,387 4 0	1,289 11 10	1,284 15 6		1,183 16 11	1,160 7 9	
			Mexico -	4 0 0	—	4 16 4		—	19 17 2	
			Guatemala -	5 16 0	—	—		—	—	
			Honduras -	—	—	—		—	3 12 0	
			Total -	1,397 0 0	—	1,289 11 10		—	1,183 16 11	
	Government stores	1,597 11 0	United States	78 7 11	—	—		—	—	
29	Haberdashery and millinery, &c.	21,031 8 0	France - -	685 16 0	Included in other headings.			Included in other headings.		
			Germany -	1,778 4 6						
			United States	541 8 0						
			Mexico -	1 4 0						
			Nicaragua -	12 16 0						
			Total -	2,969 8 0						

No.	Commodity.	Total Value of Importations. 1884. Total Imports.	Foreign Countries.	1884.	1889. Total Imports.	1889. Foreign Countries.	1894. Total Imports.	1894. Foreign Countries.
		£ s. d.		£ s. d.	£ s. d.	£ s. d.	£ s. d.	£ s. d.
30	Hardware and cutlery.	9,894 8 0	France -	18 12 0	7,873 16 8	—	6,467 18 0	—
			Germany -	278 0 0	—	99 6 2	—	81 11 8
			United States	1,854 16 0	—	2,167 1 6	—	1,425 7 0
			Jamaica -	3 0 0	—	—	—	—
			Guatemala -	9 8 0	—	—	—	—
			Honduras -	10 0 0	—	—	—	—
			Italy - -	—	—	5 19 0	—	—
			Total -	2,268 6 0	—	2,272 6 8	—	1,457 18 8
31	Hats of all sorts -	3,197 8 0	France -	97 0 0	3,825 2 10	94 7 0	1,662 6 6	—
			Germany -	87 8 0	—	36 13 10	—	—
			United States	47 0 0	—	94 7 0	—	416 11 2
			Mexico -	187 4 0	—	49 3 2	—	33 0 5
			Guatemala -	7 4 0	—	1 2 8	—	16 18 3
			Honduras -	471 16 0	—	783 2 8	—	552 5 2
			Bahamas -	—	—	41 10 2	—	—
			Nicaragua -	—	—	0 11 4	—	—
			Total - -	897 12 0	—	1,100 17 10	—	1,018 10 0
—	Hay and oats -	—	United States	—	—	—	706 15 9	706 15 9
34	Leather unwrought.	7,031 12 0	France - -	248 12 0	355 11 8	—	6,784 1 2	287 0 10
			Germany -	440 0 0	—	—	—	276 4 9
			United States	4,730 0 0	—	339 3 0	—	4,231 5 6
			Guatemala -	75 4 0	—	—	—	29 0 3
			Nicaragua -	26 0 0	—	—	—	—
			Mexico -	—	—	16 18 8	—	—
			Total -	5,519 16 0	—	355 11 8	—	4,823 11 4
—	Boots and shoes -	705 4 0	United States	467 12 0	7,732 11 10	3,084 7 4	13,569 2 7	4,108 16 9
			Mexico -	129 4 0	—	—	—	—
			Germany -	—	—	355 14 6	—	552 9 4
			France - -	—	—	335 9 4	—	576 6 9
			Switzerland -	—	—	89 13 6	—	—
			Honduras -	—	—	17 11 4	—	—
			Guatemala -	—	—	248 12 6	—	58 0 4
			Total -	596 16 0	—	4,131 8 6	—	5,295 13 2
—	Saddlery and harness.	553 8 0	Germany -	218 8 0	667 7 10	—	485 16 0	—
			United States	8 16 0	—	257 5 4	—	215 18 11
			Mexico -	25 4 0	—	35 5 6	—	—
			Jamaica -	—	—	20 5 2	—	—
			Guatemala -	—	—	13 17 8	—	0 5 9
			Honduras -	—	—	1 2 8	—	—
			Total -	252 8 0	—	327 15 4		216 4 8
—	Lamps, &c. -	532 8 0	Germany -	31 8 0	524 6 2	44 1 2	—	—
			United States	192 0 0	—	276 18 6	—	—
			Total -	223 8 0	—	320 14 8	—	—
37	Machinery - -	3,664 8 0	United States	339 4 0	2,094 5 2	1,449 16 4	1,306 11 8	1,080 0 10
			Mexico - -	—	—	—	—	20 11 6
			Total -	339 4 0	—	1,449 16 4	—	1,100 12 4
40	Metals, iron fencing.	336 8 0	United States	94 0 0	—	—	—	—
41	Musical instruments.	427 12 0	Germany -	273 12 0	1,172 3 0	306 14 2	926 10 10	307 18 5
			United States	113 0 0	—	68 5 8	—	229 18 9
			Mexico -	1 0 0	—	—	—	15 0 5
			France -	—	—	1 14 0	—	32 2 0
			Italy - -	—	—	8 15 8	—	—
			Total -	387 12 0	—	385 9 6	—	584 19 7

BRITISH HONDURAS.

No.	Commodity.	TOTAL VALUE OF IMPORTATIONS. 1884. Total Imports.	1884. Foreign Countries.		1885. Total Imports.	1885. Foreign Countries.	1894. Total Imports.	1894. Foreign Countries.
		£ s. d.		£ s. d.	£ s. d.	£ s. d.	£	£
—	Matches - -	—	United States	Included in other headings.	604 9 10	295 18 10	590 0 0	584 18 0
			Germany -		—	3 2 4	—	—
			Total -	..	—	299 1 2	—	584 18 0
43	Oils, seed - -	2,095 16 0	United States	160 0 0	758 4 0	78 1 2	548 15 3	111 14 7
			France - -	—	—	—	—	7 4 0
			Total -	160 0 0	—	78 1 2	—	118 18 7
44	Paints - -	1,845 12 0	France -	14 16 0	1,680 9 0	—	2,274 9 7	—
			Germany -	14 0 0	—	—	—	—
			Spain - -	8 4 0	—	—	—	—
			United States	278 4 0	—	242 7 10	—	490 4 7
			Nicaragua -	9 16 0	—	—	—	—
			Total -	325 0 0	—	242 7 10	—	490 4 7
—	Perfumery - -	1,743 4 0	United States	659 4 0	2,344 6 0	1,100 3 8	1,474 14 9	958 11 10
			Germany -	286 8 0	—	42 15 8	—	67 13 11
			France -	162 0 0	—	146 9 8	—	5 15 2
			Nicaragua -	10 12 0	—	—	—	—
			Barbados -	—	—	—	—	6 13 8
			Total -	1,118 4 0	—	1,289 9 0	—	1,038 14 7
48	Jewellery and plate.	3,013 0 0	France -	10 16 0	2,149 1 8	475 14 4	968 18 7	8 8 8
			Germany -	256 0 0	—	464 16 2	—	192 7 9
			United States	1,452 12 0	—	592 14 8	—	644 13 1
			Mexico -	12 0 0	—	—	—	15 4 6
			Total -	1,731 8 0	—	1,533 5 2	—	860 14 0
49	Provisions, not otherwise described. Bacon and ham.	2,700 12 0	United States	2,563 4 0	2,622 2 2	2,450 16 8	—	—
			Germany -	—	—	0 2 11	—	—
			Total -	2,563 4 0	—	2,450 19 7	—	—
	Peas and beans -	684 0 0	United States	646 16 0	Included in other headings.		Included in other headings.	
			Guatemala -	12 8 0				
			Jamaica -	1 16 0				
			Total -	661 0 0				
—	Preserved provisions.	7,557 16 0	France -	106 0 0	10,564 4 6	46 6 6	17,949 17 10	76 12 11
			Germany -	45 0 0	—	99 11 10	—	105 11 1
			United States	3,209 0 0	—	5,822 16 10	—	9,034 1 1
			Mexico -	9 4 0	—	4 16 4	—	18 5 5
			Honduras -	4 0 0	—	2 11 0	—	5 17 8
			Nicaragua -	11 8 0	—	—	—	0 8 2
			Switzerland -	—	—	22 16 2	—	—
			Curaçoa -	—	—	2 2 6	—	—
			Jamaica -	—	—	11 6 8	—	—
			Guatemala -	—	—	3 8 0	—	—
			Spain - -	—	—	—	—	4 2 4
			Holland -	—	—	—	—	20 9 6
			Total -	3,384 12 0	—	5,515 15 10	—	9,260 7 9
—	Rice - -	3,841 16 0	France -	5 0 0	8,267 0 1	—	8,164 8 1	—
			Germany -	127 4 0	—	—	—	—
			United States	139 0 0	—	9 13 4	—	330 17 2
			Total -	271 4 0	—	9 13 4	—	330 17 2
54	Silk manufactures	1,119 17 1	Honduras -	15 10 8	5,540 2 4	—	2,239 14 2	31 0 1
			China - -	379 2 4	—	141 19 4	—	1,039 0 1
			Total -	394 13 0	—	141 19 4	—	1,070 0 2

No.	Commodity.	Total Value of Importations.											
		1884.				1889.				1894.			
		Total Imports.		Foreign Countries.		Total Imports.		Foreign Countries.		Total Imports.		Foreign Countries.	
		£ s. d.		£ s. d.		£ s. d.		£ s. d.		£ s. d.		£ s. d.	
56	Soap	5,213 8 0	Germany	5 8 0		3,384 5 6		251 9 2		6,202 13 5		—	
			United States	351 16 0		—		—		—		213 19 3	
			Guatemala	—		—		0 8 6		—		—	
			Total	357 4 0		—		251 17 8		—		213 19 9	
—	Sewing machines	866 4 0	France	5 8 0		926 15 8		—		594 0 7		—	
			Germany	246 8 0		—		56 16 2		—		—	
			United States	567 4 0		—		758 15 4		—		302 0 1	
			Guatemala	—		—		3 10 10		—		—	
			Total	819 0 0		—		819 2 4		—		302 0 1	
—	Ship Chandlery	563 0 0	United States	302 0 0		1,133 9 6		644 3 2		—		—	
			Total	—		—		—		—		—	
57	Spirits, Cordials	479 8 0	France	127 12 0		258 19 4		24 13 0		Total Imports under 500*l.*			
			Germany	32 16 0		—		42 18 6					
			Spain	31 12 0		—		—					
			Nicaragua	14 0 0		—		—					
			United States	—		—		19 10 0					
			Total	206 0 0		—		68 11 4					
—	Brandy	2,969 12 0	France	842 0 0		2,213 13 8		504 12 4		1,329 18 8		850 4 11	
			Germany	12 8 0		—		34 5 8		—		76 8 9	
			United States	18 8 0		—		—		—		—	
			Honduras	12 0 0		—		—		—		14 1 11	
			Nicaragua	58 0 0		—		—		—		—	
			Total	942 16 0		—		538 18 0		—		920 15 7	
—	Gin	697 4 0	Germany	107 0 0		682 8 2		—		531 11 8		173 0 11	
			United States	2 16 0		—		0 19 10		—		—	
			Nicaragua	12 16 0		—		—		—		—	
			Holland	—		—		32 0 4		—		114 18 4	
			Total	122 12 0		—		33 0 2		—		287 19 3	
—	Whisky	572 4 0	United States	25 4 0		1,402 15 8		156 5 2		—		—	
			Nicaragua	6 0 0		—		—		—		—	
			Total	31 4 0		—		156 5 2		—		—	
61	Sugar, of all sorts	574 12 0	Germany	11 12 0		1,006 13 8		23 10 4		845 1 2		—	
			United States	458 12 0		—		856 13 2		—		827 17 7	
			Jamaica	—		—		0 11 4		—		—	
			Guatemala	—		—		1 16 10		—		—	
			Total	470 4 0		—		882 11 8		—		827 17 7	
—	Tea	—	United States	—		870 0 0		59 1 6		712 13 1		124 13 10	
—	Tobacco	2,311 8 0	United States	2,273 4 0		1,893 7 6		1,791 1 10		2,091 19 7		2,055 15 4	
			Mexico	2 16 0		—		66 8 10		—		6 3 5	
			Honduras	27 8 0		—		—		—		—	
			Total	2,309 8 0		—		1,857 10 8		—		2,061 18 9	
—	Toys	—	United States	Included in other headings.		548 2 2		14 4 8		580 9 0		220 19 7	
			Germany			—		116 17 6		—		117 0 2	
			Total	—		—		131 2 2		—		337 19 9	

BRITISH HONDURAS.

No.	Commodity.	TOTAL VALUE OF IMPORTATIONS.							
		1884.			1889.		1894.	
		Total Imports.	Foreign Countries.		Total Imports.	Foreign Countries.	Total Imports.	Foreign Countries.
		£ s. d.		£ s. d.	£ s. d.	£ s. d.	£ s. d.	£ s. d.
—	Vessels - -	—	United States Norway - Brasil -	Total imports under 500*l.*	793 8 10 — —	740 1 4 4 5 0 13 9 2	Total imports under 500*l.*	
			Total -	—	—	757 15 6		
—	Wines, sparkling	6,286 12 0	France -	1,191 8 0	690 1 2	267 15 0	2,141 19 6	170 15 8
			Germany -	328 8 0	—	5 7 8	—	357 16 4
			United States	141 8 0	—	4 19 2	—	102 1 2
			Spain - -	55 0 0	—	—	—	304 8 5
			Nicaragua -	116 12 0	—	—	—	—
			Guatemala -	—	—	14 9 0	—	12 15 2
			Total -	1,832 16 0	—	292 10 10	—	947 14 9
—	Wines, still -	—	United States France - Germany - Spain - Mexico - Guatemala -	Included in Wines, sparkling.	4,080 2 10 — — — — —	240 2 6 329 4 10 542 0 4 324 19 8 4 5 0 19 11 0	4,084 3 0 — — — — —	204 2 2 314 8 9 699 7 7 608 12 9 — 25 10 2
			Total -	—	—	3,459 8 4	—	1,851 16 5
64	Wood and timber, manufactured: Lumber, dressed.	4,339 4 0	United States Honduras -	4,339 4 0 —	2,452 10 8 —	2,444 13 0 7 18 8	1,111 12 6 —	1,100 6 2 11 6 4
			Total -	4,339 4 0	—	2,452 10 8	—	1,111 12 6
—	Lumber, rough	—	United States Mexico - Honduras - Nicaragua -	Included in dressed lumber.	3,068 15 8 — — —	3,009 0 0 29 6 6 29 12 2 0 17 0	2,545 13 7 — — —	2,533 6 8 2 1 2 10 5 9 —
			Total -	—	—	3,068 15 8	—	2,545 13 7
—	Shingles, shooks, and staves.	1,049 0 0	United States	954 12 0	—	—	Total imports under 500*l.*	
—	Blind sashes, &c.	—	United States	—	613 19 8	613 19 8	Total imports under 500*l.*	
—	Wood and wicker-ware.	1,078 0 0	Germany - United States France - Mexico -	123 0 0 717 8 0 — —	886 5 4 — — —	— 794 13 2 2 16 8 1 8 4	666 15 4 — — —	— 240 18 11 — —
			Total -	840 8 0	—	798 17 2	—	240 18 11
67	Woollen goods -	3,705 8 0	France - Germany - United States	58 16 0 188 8 0 —	3,722 12 7 — —	17 0 1 19 15 0 17 0 1	2,080 13 0 — —	— 61 3 11 141 7 8
			Total -	247 4 0	—	53 15 2	—	202 11 4

No. 6.

SIR H. A. BLAKE to MR. CHAMBERLAIN.

(Received March 16, 1896.)

King's House, Jamaica,
February 14, 1896.

SIR,

IN answer to your despatch of 28th November 1895, I have the honour to enclose a statement from the Collector-General of the various articles coming within the terms of your inquiry, with a report, prepared by Mr. J. Allwood, Assistant Colonial Secretary, to whom I entrusted the duty of making the necessary inquiries and obtaining samples where desirable.

2. Where United States goods have displaced English manufactures the causes, as shown by Mr. Allwood in his remarks upon the articles enumerated in Nos. 20, 23, 30, and 34 of the Collector-General's list, appear to be—

(*a.*) More attention to local requirements.
(*b.*) Superior finish.
(*c.*) Lower price.
(*d.*) More careful packing and absence of any special charge therefor.
(*e.*) Cheaper freights.
(*f.*) More rapid communication.
(*g.*) Should direct communication be secured for the shipping of fruit to the English market the competition will probably materially reduce the freight, but except English houses adopt the principle of studying local markets and improving their packing, it is not likely that they will recover any of the trade that has been lost.

I have, &c.,
HENRY A. BLAKE,
Governor.

Enclosure in No. 6.

Mr. J. ALLWOOD, Assistant Colonial Secretary, to the COLONIAL SECRETARY.

Colonial Secretary's Office,
February 13, 1896.

SIR,

IN compliance with the Governor's minute of the 20th ultimo, I have been making personal inquiry as to the trade subjects referred to in the Secretary of State's despatch of the 28th November, and I now submit my report.

I encountered more difficulty than I had anticipated in finding and gathering the information I needed, as well as in testing and sifting it when obtained, and my report has consequently been somewhat delayed.

My report is confined to cases of the kind specified by the Secretary of State. To cases in which the relative proportions of British and Foreign trade have not changed, or apparently changed to the disadvantage of the former, I have not extended my inquiry.

I attach a return prepared by the Collector General showing the statistics asked for in Clause "A" of paragraph 3 of the Secretary of State's despatch.

From the return it will be seen that, with the exception of Germany and the United States, the Foreign import trade of this island is so insignificant that it need not be taken into account for the purposes of this inquiry.

There are certain general features of the trade with Germany and also of that with the United States which it will be convenient to describe at the outset, so as to avoid frequent repetition when dealing with the separate heads under which the imports are classified in the return.

As regards the trade from Germany, not only is the volume of it small, but the increase represented by the figures of the Return is much more apparent than real.

With the exception of one or two items, which will be specifically referred to later on under their respective heads, there has been little or no real increase of trade in German goods. The apparent increase is due to the fact that, London being a great

entrepôt for German goods, they formerly came here invoiced as British, while of late the operation of the Trade and Merchandise Marks Laws disclosed the true origin of many of these goods, and they, together with other previously British-invoiced German goods, are now imported direct by a line of steamers which for the last two years has been running here from Hamburg.

But while this is at present the position, there is ample indication that German exporters are on the alert, and that German trade will quickly spread here through any wider opening that may be given.

The presence here of many German business houses, the recent establishment of a direct line of steamers from that country, the cheapness of labour in Germany, the special efforts being made by that Government to extend its foreign trade are some of the tendencies which make surely in that direction.

From the following table it will be seen that the two periods of apparent increases of trade with Germany synchronise with those of the operation of the Merchandise Marks Law and the establishment of direct steam communication, and so corroborate the above conclusions, drawn from information obtained from mercantile houses.

The recorded imports from Germany in each of the years from 1883–84 to 1894–95 have been as follows :—

	£
1883–84	27
1884–85	90
1885–86	311
1886–87	246
1887–88	333
1888–89	938
1890–91	6,521
1891–92	7,013
1892–93	8,574
1893–94	13,962
1894-95	24,966

As regards the trade in United States goods, the recorded increase is, in this case also, to some extent more apparent than real, owing to the fact that no inconsiderable portion of the British goods coming viâ United States have been entered here by merchants as imported from the latter country, a disturbing cause which still further complicates the true comparison by reason of the fact that of late years (specially during the last three or four) the in-transit trade from Liverpool viâ New York to this island has very greatly increased. But allowing for this, it is quite clear that the importation of bonâ-fide United States goods is rapidly growing, a circumstance which affords no matter for surprise when account is taken of the great advantage for trade with this island which the United States enjoys, by reason of our market being at her door with frequent and cheap intercommunication by steam. The relatively small freight charge on goods is an appreciable factor in favour of the United States market, and a main advantage lies in the fact that while it takes two or three months to get supplies from England, they can be had in two or three weeks from the former country, and traders here are thereby enabled to carry on their business with much smaller stocks, with much smaller capital, and with much less risk of goods spoiling or becoming unsaleable on their hands. Another not unimportant factor that favours the United States in the race for trade, and one which cannot safely be regarded as *qualité negligeable* is the astuteness and vigour with which the commercial agents of that country introduce and push the articles of trade with which they are commissioned. There is a large and increasing number of these agents in the island, and it is due greatly to their enterprise that the United States imports are finding so firm a footing here. In some cases, however, these advantages have failed, and the inroad on British trade has been merely temporary, determined efforts to capture certain lines of trade for the United States having ultimately collapsed.

The bulk of the population here looks for *cheap* things, quality being a secondary consideration. The British merchant does not bid keenly for this kind of trade. The Germans, however, recognise this characteristic and profit by it. But specially the shrewd American trader, having successfully studied in his own country the art of turning to account, in dollars and cents, the idiosyncrasies of the negro race, adroitly applies his experience here in a, to him, equally satisfactory conversion into *l. s. d.*

The above general reasons affecting the trade with Germany and the United States tell more or less heavily in the specific cases with which my report deals under separate heads, but I do not repeat them there.

3. APPAREL AND SLOPS.—*Ready Made Clothing.*—There has been no real appreciable increase from Germany, while from the United States only a portion of the increase shown is actual, and this is mainly due to our labourers here having to some extent taken to the use of the United States blue duck "jumper" and "overalls" introduced by the American workmen engaged on the railway extensions. This conclusion is corroborated by the fact that the two dates on which increase has taken place synchronise with those on which the railway extensions to Montego Bay and Port Antonio were respectively taken in hand. There has not been, nor is there likely to be, any displacement by the United States of the main trade in ready-made clothing from England.

4. ARMS AND AMMUNITION.—(*b.*) *Gunpowder.*—The increase in imports from the United States is temporary and due to the use of this article on the railway extension works which are being carried out by American contractors.

5. BAGS.—Neither from Germany nor from the United States is there any importation of new bags except in transit. The bags coming here are all jute bags manufactured in India and Scotland for sugar, coffee, pimento, &c. Those shown as imported from the United States are second-hand bags; the bags sent to that country from this with produce are washed and returned for use a second time.

6. BEER AND ALE.—There has been considerable increase in importations from both Germany and the United States, the light lager beers of those countries having gained greatly in popularity here owing to their being more suitable to the climate than the heavier English beers, as well as being cheaper. The presence here, too, of large numbers of American tourists and railway employees has tended to spread the use of American lagers, and the increase of import duty on beer under Law 2 of 1894 has also, by raising the price of beer, had some effect in increasing the sale of the cheaper kinds.

9. BOOKS, PRINTED AND OTHER.—The increase under this head is due to the large importations of cheap American reprints of English books (chiefly novels) not copyrighted, or the copyright of which has run out—for instance, the works of Besant and Rice are imported from the United States at 16 cents each, bound in cloth, while the cheapest English edition is 1*s.* 2*d.* in paper.

19. COALS.—In this article the increased importation from the United States dates from 1890–91, and is due to some extent to supplies obtained for the gas works and the railway. The gas works formerly used Pelaw Main at 23*s.* per ton, which with 10 per cent. of Cannel gave per ton 9,900 cubic feet of 15 candle-power gas, while the United States coal now used in those works at 21*s.* per ton gives 10,000 cubic feet of 18 candle-power gas. The railway formerly used best double screened Welsh coal, which they got at 19*s.* 4*d.* to 24*s.* 4*d* per ton. In 1892, and subsequently, they experimented with United States cheaper coals with varying results, but have now reverted to the use of the Welsh double-screened coal. Some of this increase is also due to the establishment of electric lighting works, the plant of which came from the United States and is adapted for use of American coal.

Coal is also imported from the United States for the lines of steamers trading to that country, and for the use of United States ships-of-war.

20. CORDAGE and TWINE.—Here the freight charge turns the scale in favour of the United States, the charge from England being double that from the former country; but the manner of putting up tells also in favour of the United States, each coil of rope from there being bagged separately, while the English practice is to put up several coils in one bale—thus the traders here can send off coils of United States rope just as they come, without trouble, while they have to unpack and bag English rope.

23. COTTON MANUFACTURES:

(*a.*) *Piece Goods.*—Here the great increase has occurred in importations from the United States in the last two years, and has been in *cheap* cotton print goods, the import of which in 1893–94 was about double that of the previous year, while in 1894–95 a further increase of 60 per cent. took place. This sudden inroad is said to be primarily due to dullness of the United States home market, leaving the manufacturers with large surplus stocks which they are glad to get rid of at competition rates,

and the opinion in some quarters is that it will not last. Up to date, however, the increase still continues to grow, and looking to the favour with which these goods are taking the market, it is probable that they will continue to displace English prints of the kind at present sent out, specially as the United States, formerly careless about this trade, now appears to be paying more attention to it, and to be adapting its goods of this kind to the West Indian and Central American markets. The United States prints, though sometimes narrower than the English and not always cheaper, are so superior in finish, design, and quality, as to give the appearance of a cloth of much greater value; they are also of faster colours, but the main advantage lies in the variety and novelty of the patterns and in their attractiveness for the class whose custom they are intended to secure, and this is where the English goods suffer heavily in the competition.

I attach some samples of English and United States prints, with the widths and prices marked on them.

It is said, however, that there are now indications that the English trade has become alive to the causes which enable the United States to successfully compete with them on their own ground as it were.

The circumstance that English prints of this class are heavily "sized" formerly told greatly in their favour by the appearance of substance thus given to the cotton, but this the growing intelligence of the people no longer so generally accepts.

(*b.*) *Thread for Sewing.*—The import from the United States of thread is apparent and not real. All the thread used in this island is English. The thread entered as from the United States comes in transit through that country.

(*c.*) *Hosiery and Small-Wares.*—In this case also there has been no real displacement of British Trade.

29. HABERDASHERY AND MILLINERY.—So far as I can ascertain, there has not been any real displacement of British trade under this head, which, however, is so comprehensive and covers such a multitude of small articles, many of which are differently classed by different people, that it is not easy to deal definitely with it. It is said that the bulk of this trade has never been really English, but only in transit through England, and that any displacement is certainly not by United States goods.

30. HARDWARE AND CUTLERY.—This, like the last head, is a very elastic term, and it embraces a large and varied assortment of articles, the contrasting features of each of which it would not be feasible to differentiate in a report of this kind. The details are such as can be more profitably dealt with by the commercial travellers of English business houses, and, I am told, have in many instances been represented, but without appreciable result.

Treating the subject generally, one main cause for the preference given to United States over English articles is that they are more attractively put up, that the finish is better, irrespective of the class of goods (a feature which tells specially in facilitating the sale of inferior goods), that the way in which they are put up is more suitable, giving less trouble to the importer, and showing an intelligent study of the details of the trade. Their hardware is neatly boxed; chisels for instance come in neat boxes of one dozen each, while from England they come in paper, and so are much more liable to rust. In the better class of tools and implements, the United States, in addition to the adventitious advantages such as those above alluded to, is beating the English manufactures in intrinsic superiority; for instance in axes, hatchets, hammers, shovels and spades, the United States tools are better adapted for work on our hard woods, &c.

A considerable value in buggy materials, both wood and iron, is imported (almost as a matter of course) from America, and comes under this heading.

From Germany a cheap description of cutlery is imported, its first class finish giving it a ready sale.

34. LEATHER:

(*b.*) *Boots and Shoes.*—Under this head, the increase, which is considerable and of quite recent occurence, is real, the value of 1893–94 imports having been about double that of the previous year, and the annual increase still continues. The spurt is due to the enterprise of a business house here, which deals almost entirely in American boots and shoes, and goes to the extent of sending to the United States, to be copied and produced at a cheaper rate, any English boot or shoe which sells well here. The United States is steadily absorbing this trade, specially in the cheaper kinds, mainly because they are cheaper, but also because they are better finished, more attractive, and

fit better, by reason of there being several widths in each size. The accessibility of the United States market specially tells in the case of these goods, which rapidly deteriorate here, and great advantage therefore lies in being able to order frequently and in small quantities. The United States shipper makes no charge for packing or cases as does the English shipper, and this, with the cheaper freight and charges, makes about 15 per cent. difference in the cost of the goods.

From many quarters it is said that the English houses will not lay themselves out to compete for this trade, though samples of the successful United States boots have been sent to them.

Samples of English and American boots with price stated are sent with this.

(*d.*) *Saddlery and Harness.*—There has been much increase in the last two or three years in importations from the United States of Harness of a cheap and light description, inferior to that obtained from England. It is the smaller price and the appearance given by better finish that sets the drift of trade in this and in very many other articles in this Island. The extensive use within the last few years of light American two-wheelers has also led to the introduction of a cheap and light harness specially suited for use with them.

37. MACHINERY:

(*a.*) *Steam Engines.*—The increase here in favour of the United States is coincident with the sale of the railway, and is the consequence of it. The importation from Germany is an isolated instance, and was for dye works started under German-Swiss management.

(*b.*) *Other Sorts.*—The imports from the United States fluctuate considerably, but have on the whole materially increased. They consist of the lighter kinds of machinery, such as are used for electric lighting works, ice manufactories, small sugar mills, &c. The ease with which damaged parts of machinery may be re-placed from America has much to do with the orders given to that country. Heavy machinery for sugar estates, &c., all comes from the United Kingdom.

39. MEDICINES.—The increase here is entirely in "patent medicines," and dates from 1892 when, by Law 1 of that year, these articles were admitted free of duty.

The pre-eminent genius of the American inventor for this kind of compounds, and the well-known weakness of the people here for anything in the shape of quackery, have been readily brought together by the enterprising agents of the nostrums and turned to financial account.

The orthodox drugs and medicines are still obtained from England.

40. METALS:

A. *Iron*:—

(*d.*) *Railroad, of all sorts.*—This is due to the construction of railway extensions under American contractors.

(*e.*) *Wire for fencing.*—Plain fence wire is all still imported from the United Kingdom, it is only galvanised barbed wire that is obtained from the United States, it is slightly cheaper, but it is the freight charge that gives the trade in this article to the United States, the freight from that country being 50 per cent. less than from the United Kingdom.

B. *Cast or Wrought.*—The bulk of the actual increase under this head is in nails; wire nails are now exclusively used here and have altogether displaced other kinds. They are imported from the United States, Belgium, or Germany, according to the price ruling at the time in one or other of those markets.

The wrought nail has been altogether superseded, its cost being 20*s.* per 100 lbs. to 9*s.* per 100 lbs. for the wire nail, while the number of the latter in the pound is considerably greater.

45. PAPER:

(*a.*) *Printing and Writing.*—The importations from the United States are very fluctuating. The amount has frequently been greater than that shown for 1895, and it can hardly be said that British trade is being appreciably displaced here, but apart from the general advantages of its position, there are other reasons which tell in favour of the United States and will tend to divert this trade to it, viz., the more convenient way in which these goods are put up, and the fact that no charge is made for packing cases, as is done in the case of shipments from England. I attach samples of the paper most largely imported from the United States, with prices noted on them.

JAMAICA.

49. PROVISIONS:

(*a.*) *Farinaceous.*—In the many articles which come under this head, the chief causes of preference for the United States are those which naturally accrue to so easily accessible a market, and specially apply in the case of perishable goods, but apart from this, which seriously handicaps any other market, the United States goods are put up in a more attractive and convenient shape, and in many instances unnecessary cost is added to the English goods by the more expensive tin and other coverings in which they are enclosed.

(*g.*) *Rice.*—No American-grown rice comes here, it is too expensive for this market. The rice recorded as coming from the United States and Germany is all East Indian rice, in transit through those countries or taken there to be cleaned.

56. SOAP.—Some small increase has taken place in the better sorts of toilet soaps, but the bulk of the recorded increase is apparent and not real, and is to be attributed to the importations coming now viâ New York, through which place a good deal of the formerly direct trade from England has been diverted during late years.

The above is the information called for, so far as I have been able to collect and analyse it, and in doing so I have met generally with ready assistance from the merchants and others whom I have consulted; from some few, however, information has not been forthcoming, under the mistaken idea that it would "expose their business."

I have, &c.,
J. ALLWOOD.

Enclosure 2 in No. 6.

MEMORANDUM by the COLLECTOR GENERAL.

I FORWARD herewith the return asked for in paragraph 3*a*, of this despatch, and with reference thereto beg to observe that the classification of imports having, under authority of your letter of the March 1892, been closely assimilated to that used in the English Export List, it has been practicable to give the required information for the year 1894–95, in accordance with the list given in Annexe I. to the despatch, but for the earlier years it has been found necessary to adjust our classification as nearly as possible to that list. For this reason the particulars for the year 1894–95, are entered in the Return before those for the years 1889 and 1884.

2. The values for 1894–95, include the cost of transport, while those for the earlier [years] represent the first cost of the goods at the place of shipment.

3. In the preparation of the Import Returns of this Colony every effort is made to show correctly the countries of production, but in the case of goods from foreign countries passing through Great Britain, it is not possible to show such goods otherwise than as British. The United States of America may, in like manner, get credit for goods coming to this island from Great Britain viâ New York, but I do not think to an extent sufficient to affect the general correctness of the Returns.

4. While general reasons can be assigned to account for the increase in the imports of foreign manufactures, it would, I think, be useless for the officers of this department to attempt to give the information asked for at 3*b*. Such information would fall far short of what is required by the Secretary of State, and be wanting in those technical details which would alone make it valuable to the British manufacturers. Believing that the necessary details can only be supplied by those engaged in trade, I beg to submit, for the consideration of the Governor, that an appeal should be made to the Chamber of Commerce to procure the information, or that a committee of merchants should be appointed by his Excellency for that purpose.

5. The principal competitors with whom the British manufacturer has to contend are the United States of America and Germany. With regard to such commodities as bread, butter, cheese, corn, flour, cotton seed oil, tinned provisions, lumber, and shooks, the natural source of supply is the American market and with the advantages of speedy communication and cheap freights the trade with that country is likely to be maintained. But in the interests of the British manufacturer, enquiry might be profitably instituted in respect of the following goods—(3) Apparel and slops;

(4) Arms and ammunition; (5) Bags, empty; (6) Beer and ale; (9) Books, printed; (12) Caoutchouc, manufactures of; (13) Carriages, railway; (16) Chemical products; (19) Coal; (20) Cordage; (23) Cotton manufactures; (24) Earthenware and china-ware; (26) Furniture; (27) Glass; (28) Grease; (29) Haberdashery and millinery; (30) Hardware and cutlery; (31) Hats; (32) Implements and tools; (34) Leather, boots and shoes, saddlery and harness; (37) Machinery; (39) Medicines; (40) Metals; (44) Painters' colours; (45) Paper, wrapping and printing; (56) Soap; (58) Stationery; (59) Stones and slates; (61) Sugar, refined; (62) Telegraphic materials; and (64) Wood and timber manufactures.

6. The enquiry, as will be seen by the above list, would extend over a wide range of goods. It would therefore be desirable to appoint more than one committee, as persons having a thorough knowledge of cotton manufactures, for instance, would not have sufficient acquaintance with leather manufactures or hardware.

ROBT. BATTEN,
Collector General.

17th January 1896.

No.	Commodity.	Year ended 31st March 1895.			Year ended 30th September 1889.			Year ended 30th September 1884.			Remarks.
		Total Value of Importation.	Value of Importations from Foreign Countries.		Total Value of Importation.	Value of Importations from Foreign Countries.		Total Value of Importation.	Value of Importations from Foreign Countries.		
		£ s. d.		£ s. d.	£ s. d.		£ s. d.	£ s. d.		£ s. d.	
2	Animals, horses -	6,147 9 10	U.S. America -	1,460 18 10	312 14 0	U.S. America -	125 0 0	278 0 0	Foreign States -	78 0 0	Recently there has been a growing demand for horses from abroad. Several importations have been made from Cuba and from Southern ports in the United States of America. The superior size and showy appearance of the animals seem to be the cause. The discontinuance of the use of horses on the tramcars in the States has also led to a reduction in price.
			Foreign W. Indies	3,742 0 0		Foreign States -	164 14 0				
			Foreign States -	202 0 0							
			Total - -	5,404 18 10		Total - -	289 14 0				
3	Apparel and Slops -	63,983 3 8	U.S. America -	2,914 7 0	20,365 6 0	U.S. America -	1,234 11 9	8,280 10 4	U.S. America -	343 1 11	The comparison between the figures of 1884 and 1889 and those of 1895 is not a genuine one. Articles that are now included under the head of apparel and slops were formerly included under cotton manufactures and woollen manufactures.
			Austria - -	6 14 5		Foreign States -	473 18 2		France - -	26 13 0	
			China - -	4 11 0		France - -	10 0 0				
			Foreign States -	48 18 0		Germany -	3 6 6				
			Foreign W. Indies	3 0 0		Hayti - -	15 14 0				
			France - -	115 19 8		Mexico - -	0 6 0				
			Germany -	859 11 11							
			Hayti - -	22 13 0							
			Total - -	3,975 15 0		Total - -	1,737 16 5		Total - -	369 14 11	
4	Arms and Ammunition:										
	(a) Fire Arms (small).	1,077 3 5	U.S. America -	236 1 7	418 16 3	U.S. America -	86 1 4	306 18 9	U.S. America -	51 10 0	
			Germany - -	26 10 5		Foreign States -	1 10 0				
			Total - -	262 12 0		Total - -	87 11 4				
	(b) Gunpowder -	5,745 15 5	U. S. America -	4,937 15 5	742 11 6	- - -	—	1,396 4 0	- - -	—	The increase in gunpowder and explosives is due to the railway extension, and the increase in the proportion coming from the United States of America is mainly attributable to the contractors being Americans.
	(c) Of all other kinds.	4,762 16 2	U.S. America -	3,245 11 3	1,477 3 9	U.S. America -	246 1 1	4,148 7 11	U.S. America -	1 10 0	
			China - -	10 10 7							
			Foreign States -	11 17 0							
			Total - -	3,267 18 10							

5	Bags, empty	8,175 10 8	U.S. America	2,132 7 6	3,948 13 8	U.S. America	741 15 5	4,203 4 1	U.S. America	108 14 5	The increase is due to bags being more extensively used in the exportation of sugar. Bags of sugar are more readily handled than hogsheads, and freight rates are in favour of this mode of packing.
			France	1 10 2							
			Germany	28 2 6							
			Total	2,162 0 2							
6	Beer and ale	49,842 4 0	U.S. America	2,747 16 0	44,253 18 5	U.S. America	3,148 12 4	42,916 19 8	U.S. America	860 6 0	
			Foreign States	0 10 8		Foreign States	13 2 6		Foreign States	0 14 0	
			Germany	1,478 4 0		Germany	3 10 0		Foreign W. Indies	1 8 0	
			Hayti	2 4 0					Hayti	1 4 6	
			Total	4,228 14 8		Total	3,165 4 10		Total	863 12 6	
7	Biscuit and bread	22,785 1 8	U.S. America	22,761 0 4	13,104 11 9	U.S. America	13,072 16 9	9,500 4 5	U.S. America	9,472 15 2	The large increase in the importations is due to the withdrawal of large numbers of labourers from agricultural pursuits to work on the railway extension, street improvements, and other public works.
			France	1 2 3		Foreign States	1 9 9				
			Norway	3 9 4							
			Total	22,765 11 11		Total	13,074 6 6				
9	Books, printed and others.	19,587 10 3	U.S. America	3,954 3 10							
			Danish W. Indies	11 8 0							
			Foreign States	3 0 0							
			France	0 11 0							
			Germany	171 13 11							
			Hayti	6 6 0							
			Total	4,147 2 9							
	Books printed	—		—	9,963 11 11	U.S. America	935 17 8	10,161 9 8	U.S. America	1,335 3 2	Books printed cannot be shown separately for 1895.
						Foreign States	18 0 0		France	5 0 0	
						Hayti	0 13 0		Foreign W. Indies	6 0 0	
									Foreign States	13 0 0	
						Total	954 10 8		Total	1,359 3 2	
	Brooms and brushes	2,132 4 5	U.S. America	433 10 1	—		—	—		—	Cannot be shown separately.
			France	2 9 8							
			Germany	17 12 2							
			Total	453 11 11							
10	Butter :—										
	(a) Butter	28,130 7 0	U.S. America	23,731 19 0	23,508 1 8	U.S. America	21,294 14 7	28,460 11 11	U.S. America	26,335 1 7	
			Foreign States	2 6 0		Foreign States	14 16 3		France	89 0 7	
			Germany	224 10 0		Hayti	0 3 9		Foreign W. Indies	4 11 8	
			Hayti	7 1 0		Mexico	0 2 3		Foreign States	12 5 8	
			Norway	0 7 0					Hayti	1 7 6	
			Total	23,966 3 0		Total	21,309 16 10		Total	26,442 7 0	

No.	Commodity.	Year ended 31st March 1895.			Year ended 30th September 1889.			Year ended 30th September 1884.			Remarks.
		Total Value of Importation.	Value of Importations from Foreign Countries.		Total Value of Importation.	Value of Importations from Foreign Countries.		Total Value of Importation.	Value of Importations from Foreign Countries.		
	Butter—*cont.* (*b*) Butterine, oleomargarine and other substitutes for butter.	£ s. d. 10,013 11 0	U.S. America	£ s. d. 9,709 9 6	£ s. d. —	- - -	£ s. d. —	£ s. d. —	- - -	£ s. d. —	In 1889 and 1884 subject to *ad valorem* duty, and shown as goods non-enumerated. Quantities imported in those years were trifling.
11	Candles of all sorts -	3,198 17 11	U.S. America Foreign States	608 0 8 0 3 6	2,188 9 0	U.S. America Foreign States	502 7 0 0 14 0	3,191 3 10	U.S America Foreign States	897 17 2 0 6 8	
			Total - -	608 4 2		Total - -	503 1 0		Total - -	898 3 10	
12	Caoutchouc, manufacturers of:— India-rubber and gutta percha goods.	5,371 18 4	U.S. America France - Germany -	1,533 6 7 1 5 0 16 10 10	—	- - -	—	—	- - -	—	The importation of rubber goods prior to 1891, when they were placed in the free list, was limited.
			Total - -	1,551 2 5							
13	Carriages, and waggons, railway.	5,366 17 5	U.S. America Germany -	4,873 16 10 358 16 0	689 15 7	- - -	—	29,630 3 6			
			Total - -	5,232 12 10							
15	Cheese - -	9,712 2 7	U.S. America Foreign States Foreign W. Indies Germany - Hayti - Holland -	8,745 10 8 1 12 0 12 1 4 42 3 8 0 14 0 10 11 4	8,975 17 8	U. S. America Foreign States Hayti -	8,158 1 8 3 9 0 1 5 6	8,408 13 8	U.S. America France - Foreign W. Indies Foreign States	7,594 3 11 23 0 10 1 5 0 0 15 0	
			Total - -	8,812 12 0		Total - -	8,162 16 2		Total - -	7,619 4 9	
16	Chemical products and dye stuffs.	3,906 11 6	U.S. America Austria - France - Hayti -	1,194 6 0 3 12 1 0 19 3 0 5 0	682 0 11	U. S. America -	77 4 10	211 3 4	U.S. America -	6 5 10	The exemption from duty of drugs has led to a more critical examination of such goods, and many articles which were formerly placed under that head are now shown as chemical products.
			Total - -	1,199 3 4							

18	Clocks and watches -	2,304 19 6	U.S. America -	958 1 6	867 18 9	U.S. America -	456 15 10	584 8 8	U.S. America -	380 10 1	The increase is due to exemption from duty and better classification and greater demand for cheap time-keepers.
			Foreign States -	5 0 0		Foreign States -	46 11 0				
			France - -	2 0 0		Germany - -	15 2 10				
			Germany - -	164 18 2							
			Hayti - -	12 15 0							
			Norway - -	5 11 6							
			Total - -	1,148 6 2		Total - -	518 9 8				
19	Coals :—										
	(a) Coals, cinders and fuel.	58,050 9 0	U S. America -	6,953 15 6	33,455 18 6	U.S. America -	187 17 6	28,859 9 2	Foreign States -	200 0 0	Increase due to extension of railway, increased consumption by the Electric Light Company, to importations for the use of the Navy of the United States of America, and for steamers trading to the North side.
20	Cordage and twine -	4,740 18 9	U.S. America -	1,710 12 0	7,129 5 4	U.S. America -	796 18 2	4,581 18 5	U.S. America -	363 15 5	
			Norway - -	57 0 0		Foreign States -	0 12 0				
			Total - -	1,767 12 0		Total - -	797 10 2				
	Fishing apparatus of all kinds.	1,840 1 4	U.S. America -	157 14 8	—	- - -	—	—	- - -	—	Included in Cordage and Twine in 1889 and 1884.
			Germany - -	6 15 2							
			Total - -	164 9 10							
21	Corn :—										
	(a) Wheat - -	184 7 2	U.S. America -	184 7 2	362 17 3	U.S. America -	362 17 3	302 0 0	U.S. America -	302 0 0	
	(b) Wheat flour -	149,681 7 9	U.S. America -	149,559 10 3	161,526 18 2	U.S. America -	161,523 6 11	146,533 18 8	U.S. America -	146,519 10 7	Lower prices account for the apparent decrease in 1895.
			Norway - -	0 8 1					France - -	0 1 8	
			Total - -	149,559 18 4					Total - -	146,519 12 3	
	(c) Of other kinds	55,975 2 11	U.S. America -	54,368 17 8	35,498 9 1	U.S. America -	35,141 4 3	20,323 0 6	U.S. America -	20,038 13 1	Increase due to failure of crops in Jamaica and to large increase in animals kept for purposes of locomotion by the car company, livery stable keepers, and busowners.
						Foreign States -	3 5 0		Foreign States -	3 4 0	
									Foreign W.Indies	1 10 6	
									Hayti - -	3 17 4	
						Total - -	35,144 9 3		Total - -	20,047 4 5	

No.	Commodity.	Year ended 31st March 1895.			Year ended 30th September 1889.			Year ended 30th September 1884.			Remarks.
		Total Value of Importation.	Value of Importations from Foreign Countries.		Total Value of Importation.	Value of Importations from Foreign Countries.		Total Value of Importation.	Value of Importations from Foreign Countries.		
		£ s. d.		£ s. d.	£ s. d.		£ s. d.	£ s. d.		£ s. d.	
23	Cotton manufactures :—										
	(*a*) Piece goods -	268,258 13 3	U.S. America -	28,329 14 10	—	- - -	—	—	- - -	—	This item varies considerably from year to year. It is affected by the stocks held by the storekeepers, by the circumstances of the peasantry, and the native food supply. When the latter is plentiful the sale of cotton goods is brisk, but when money is tight and imported provisions have to be resorted to it is the reverse.
			China - -	0 3 3							
			Foreign States -	49 2 8							
			France - -	120 5 2							
			Germany -	865 6 4							
			Hayti - -	3 14 0							
			Holland - -	43 17 9							
			Total - -	29,412 4 0							
	(*b*) Thread for sewing.	27,454 0 1	U.S. America -	3,691 15 8							
			Belgium - -	41 16 9							
			Foreign States -	0 12 0							
			Germany - -	21 15 9							
			Total - -	3,756 0 2							
	(*c*) Hosiery and small wares.	7,534 7 8	U.S. America -	89 16 8	244,813 16 11	U.S. America -	3,337 16 7	310,557 8 8	U.S. America -	2,641 5 9	
			France - -	20 10 0		Foreign States -	112 6 0		Foreign States -	394 4 6	
			Germany - -	868 15 5		France - -	7 10 0				
						Germany - -	60 1 4				
						Hayti - -	5 10 0				
						Mexico - -	0 16 0				
			Total - -	979 2 1		Total - -	3,523 19 11		Total - -	3,035 10 3	
24	Earthen and china ware, including manufactures of clay.	16,676 4 8	U.S. America -	554 8 9	8,512 18 9	U.S. America -	524 18 7	6,050 9 1	U.S. America -	75 13 0	There has been a great increase in these goods of late.
			Austria - -	1 0 0		Foreign States -	17 3 0		France - -	29 5 1	
			China - -	0 8 6		Germany - -	45 5 11				
			Foreign States -	5 6 8							
			Foreign W. Indies	0 4 0							
			France - -	20 7 5							
			Germany - -	1,387 13 10							
			Hayti - -	0 8 0							
			Total - -	1,999 17 2		Total - -	587 7 6		Total - -	104 18 1	

25	Fish:—											
	(*a*) Herrings	30,815 15 11	U.S. America	3,898 17 4	29,813 1 2	U.S. America	4,204 7 10	33,335 9 3	U.S. America	4,083 7 2		
			Norway	8 15 4								
			Total	3,907 12 8								
	(*b*) Of other sorts	166,372 9 9	U.S. America	20,906 16 1	134,377 9 2	U.S. America	21,076 5 6	145,374 8 7	U.S. America	11,978 16 1		
			Foreign States	2 1 8		Foreign States	33 1 3		Foreign States	7 8 6		
			Foreign W. Indies	4 7 6					Foreign W. Indies	1 3 9		
			France	5 4 5					France	36 12 8		
			Germany	26 0 3								
			Hayti	0 12 0								
			Norway	1 13 4								
			Total	20,946 15 3		Total	21,109 6 9		Total	12,018 15 6		
26	Furniture, cabinet and upholstery wares.	14,941 13 6	U.S. America	6,160 13 11	6,728 9 6	U.S. America	2,960 0 9	6,055 8 5	U.S. America	2,988 10 0	In 1889 and 1884 pianos were classified under "Musical Instruments"; in 1895 under "Furniture."	
			China	0 11 0		Foreign States	290 11 8		Foreign States	16 6 6		
			Foreign States	73 8 0		Hayti	2 10 0					
			Foreign W. Indies	12 0 0		Mexico	1 10 0					
			France	11 14 5								
			Germany	711 4 7								
			Hayti	1 6 0								
			Total	6,970 17 11		Total	3,254 12 5		Total	3,004 16 6		
27	Glass:—											
	(*a*) Bottles	1,290 15 9	U.S. America	682 11 10								
			Belgium	4 18 5								
			France	2 1 8								
			Germany	196 15 2								
			Total	886 7 1	6,405 2 0	U.S. America	1,829 12 3	6,054 16 1	U.S. America	2,612 15 8		
						Foreign States	4 0 0		France	16 18 0		
	(*b*) Of other sorts	7,187 9 1	U.S. America	2,178 10 0		Germany	8 11 0		Germany	6 7 6		
			Austria	15 16 11								
			Belgium	369 15 1								
			Foreign States	0 4 0								
			Germany	472 4 6								
			Total	3,036 10 6		Total	1,842 3 3		Total	2,636 1 2		
28	Grease, tallow, and animal fat.	1,725 8 4	U.S. America	1,283 16 4	707 19 2	U.S. America	287 5 7	1,832 16 10	U.S. America	905 4 3	Due to increase in machinery and locomotives.	

No.	Commodity.	Year ended 31st March 1895.			Year ended 30th September 1889.			Year ended 30th September 1884.			Remarks.
		Total Value of Importation.	Value of Importations from Foreign Countries.		Total Value of Importation.	Value of Importations from Foreign Countries.		Total Value of Importation.	Value of Importations from Foreign Countries.		
		£ s. d.		£ s. d.	£ s. d.		£ s. d.	£ s. d.		£ s. d.	
29	Haberdashery and millinery.	61,078 2 11	U.S. America -	2,865 16 0	88,356 1 6	U.S. America -	840 15 8	96,739 2 1	U.S. America -	840 8 2	Goods which were formerly classed under this head are now shown as apparel and slops and hats.
			Austria - -	10 9 8		Foreign States -	91 4 4		Foreign States -	196 18 10	
			China - -	0 4 0		France - -	5 0 2		France - -	95 13 6	
			Foreign States -	23 16 3		Germany - -	82 16 3				
			Foreign W.Indies	2 16 0		Hayti - -	4 18 6				
			France - -	220 15 10		Mexico -	2 2 6				
			Germany -	531 4 5							
			Hayti - -	11 13 4							
			Italy - -	15 19 2							
			Total -	3,682 14 8		Total -	1,026 17 5		Total -	1,133 0 6	
30	Hardware and cutlery	38,957 10 4	U.S. America -	11,062 1 8	57,777 18 5	U.S. America -	9,986 2 4	55,422 9 5	U.S. America -	4,987 0 1	Implements and tools of all descriptions were included under this head in 1889 and 1884.
			Foreign States -	5 18 8		Foreign States -	20 6 8		Foreign States -	0 12 0	
			France - -	54 1 3		Hayti - -	8 12 6				
			Germany - -	332 5 1							
			Hayti - -	7 8 0							
			Total -	11,511 14 8		Total -	10,015 1 6		Total -	4,987 12 1	
31	Hats of all sorts -	24,166 18 11	U.S. America -	1,088 10 1	14,065 15 9	U.S. America -	274 19 8	7,877 14 8	U.S. America -	71 8 8	Many hats which are now shown under this head were shown in the years 1889 and 1884 as millinery, but there is a decided increase in the importations.
			Foreign States -	2 11 0		Foreign States -	9 3 0				
			France - -	3 3 8		Germany - -	10 7 0				
			Germany - -	153 0 4		Hayti - -	1 12 0				
			Total -	1,247 5 1		Total -	296 1 3				
32	Implements and tools of industry:—										
	(a) Agricultural	9,293 18 7	U.S. America -	4,201 0 6							
			Germany - -	3 16 0							
			Total -	4,204 16 6							
	[illegible]l others -	1,413 2 4	U.S. America -	645 17 11	481 14 2	U.S. America -	240 6 6	511 15 6	U.S. America -	135 8 4	Classified as hardware and cutlery in 1889 and 1884.
			Foreign States -	0 10 0					Foreign W.Indies	0 10 5	
			France - -	0 16 0							
			Total -	647 3 11					Total -	135 18 9	

25	Fish:— (a) Herrings and fish:— (b) Surgical, anatomical and scientific.	2,706 19 10	U.S. America France Germany Norway Total	629 13 4 15 0 9 14 7 8 1 6 0 860 7 9	1,849 19 7	U.S. America	360 6 10	726 17 3	U.S. America France Total	237 11 2 3 15 6 241 6 8	
34	Leather:— (a) Unwrought	5,238 16 8	U.S. America France Total	1,348 3 11 134 5 11 1,377 9 10							
	(b) Wrought, boots and shoes.	70,982 12 10	U.S. America Austria China Foreign States France Germany Hayti Total	21,352 15 11 241 11 11 4 5 3 22 18 3 153 14 1 127 1 0 2 16 0 21,905 2 5	47,234 5 10	U.S. America Foreign States France Hayti Total	9,546 18 9 114 5 3 1 7 4 3 15 4 9,666 7 1	38,831 5 11	U.S. America Foreign States Foreign W.Indies France Total	4,450 12 8 9 0 3 27 9 4 1,204 0 11 5,691 3 2	The large increase is due to advance in civilization of the masses and to the cheap rates at which the goods are imported and sold.
	(c) Wrought, of other sorts.	3,588 6 6	U.S. America France Germany Total	783 5 5 102 16 7 24 11 7 910 13 7							
	(d) Saddlery and harness.	18,214 19 7	U.S. America Foreign States Foreign W.Indies Total	2,887 0 7 30 2 0 3 0 0 2,920 2 7	14,149 8 10	U.S. America Foreign States Hayti Total	1,708 15 2 5 13 6 4 12 0 1,718 19 8	13,244 12 3	U.S. America	944 7 11	
37	Machinery:— (a) Steam engines	36,231 13 11	U.S. America Germany Total	12,032 16 0 2,205 5 4 14,238 1 4	16,168 2 11	U.S. America Germany Total	1,629 0 11 7 10 0 1,636 10 11	15,434 15 6	U.S. America France Total	3,112 11 2 91 18 0 3,204 9 2	Railway extension, increase in manufactories for ice, electric light, &c.
	(b) Of other sorts	10,144 6 2	U.S. America Germany Total	4,258 13 10 795 6 2 5,054 0 0	4,993 6 6	U.S. America Foreign States Germany Hayti Total	1,519 6 7 2 0 0 57 1 0 3 0 0 1,581 7 7	7,424 4 5	U.S. America Hayti Total	1,475 15 10 0 12 0 1,476 7 10	

No.	Commodity.	Year ended 31st March 1895.		Year ended 30th September 1889.		Year ended 30th September 1884.		Remarks.
		Total Value of Importation.	Value of Importations from Foreign Countries.	Total Value of Importation.	Value of Importations from Foreign Countries.	Total Value of Importation.	Value of Importations from Foreign Countries.	
39	Medicines	£ s. d. 24,270 13 2	£ s. d. U.S. America - 9,165 9 6 Danish W. Indies 1 0 0 Foreign W. Indies 0 2 0 Foreign States - 1 10 0 France - 31 19 7 Germany - 61 8 0 Hayti - 3 0 0 Norway - 1 4 0 Total - 9,265 13 1	£ s. d. 17,253 11 1	£ s. d. U.S. America - 4,882 4 3 Foreign States - 7 12 0 Germany - 1 2 6 Hayti - 1 9 0 Total - 4,892 7 9	£ s. d. 15,864 11 5	£ s. d. U.S. America - 4,517 14 1 France - 398 1 6 Total - 4,915 15 7	The exemption from duty of this commodity has led to very great increase in the importation of patent medicines and nostrums.
40	Metals :— (a) Iron :— (b) Pig and puddled.	112 4 4	- - - —	47 5 2	- - - —	80 15 0		
	(c) Bar, angle, bolt, and rod.	2,489 13 9	U.S. America - 275 4 1	577 2 4	U.S. America - 11 17 5	888 14 7	U.S. America - 2 7 11	
	(d) Railroad, of all sorts.	9,908 8 0	U.S. America - 3,392 9 3	—	- - - —	—	- - - —	*See* 13. Classified in 1889 and 1884 under Railway Carriages and Materials.
	(e) Wire (wire fencing included).	8,832 15 3	U.S. America - 5,333 9 4 Germany - 11 2 5 Total - 5,344 11 9	4,056 13 0	U.S. America - 1,476 17 6	2,828 7 11	U.S America - 262 13 3	
	(f) Hoops, sheets, and boiler plates.	1,926 15 7	U.S. America - 45 13 2	—	- - - —	—	- - - —	Classified in 1889 and 1884 under Hardware.
	(g) Tinned plates	2,813 7 0	U.S. America - 138 14 0	1,328 13 4	U.S. America - 260 2 0	2,488 17 0	U.S. America - 74 2 2 Foreign States - 20 0 0 Total 94 2 2	

	(*h*) Cast or wrought, and all other iron manufactures.	88,877 13 11	U.S. America -	5,220 12 5	9,409 4 2	U.S. America -	320 8 7	15,183 14 11	U.S. America -	192 12 5				
			Germany - -	552 2 2										
			Total -	5,772 14 7										
	(*i*) Steel, unwrought.	540 8 0	U.S. America -	848 5 1										
	(*b*) Copper:—													
	(*b*) Wrought or partly wrought:—													
	Mixed or yellow metal.	547 2 8	U.S. America -	7 3 4	—	- - -	—	543 15 10						
	Of other sorts -	1,837 12 2	U.S. America -	214 8 5	378 1 9	- - -	—	324 2 8	U.S. America -	61 18 0				
	(*f*) Zinc, wrought and unwrought.	61 17 2	U.S. America -	10 9 10										
41	Musical instruments -	—	- - -	—	3,739 12 0	U.S. America -	1,048 5 2	2,730 18 0	U.S. America -	563 11 5	Included in 1895 in "Furniture."			
						Foreign States -	108 13 7		France - -	64 8 0				
						France - -	65 15 6		Hayti - -	20 0 0				
						Germany - -	11 10 8							
						Total - -	1,234 4 11		Total - -	647 19 5				
43	Oil, cotton seed -	7,565 12 0	U.S. America -	7,565 12 0	10,284 5 6	U.S. America -	9,565 12 5	1,714 18 8	U.S. America -	1,153 8 8	In 1892 the products of cotton seed were exempted from duty and in consequence the importations largely increased. Although there is an apparent decrease in value between 1895 and 1889, there has been a large increase in quantity.			
						Foreign States -	35 17 11		France - -	33 14 0				
						Germany - -	3 8 5		Foreign W.Indies	13 2 8				
						Total - -	9,604 18 9		Total - -	1,200 5 4				
44	Painters' colours and materials.	8,923 6 10	U.S. America -	2,257 5 9	4,869 15 11	U.S. America -	818 10 0	3,798 10 0	U.S. America -	410 16 6				
			Germany - -	13 17 4		Foreign States -	1 6 0							
			Total - -	2,271 3 1		Total - -	819 16 0							
45	Paper:—													
	(*a*) Printing and writing.	9,981 18 5	U.S. America -	1,599 15 3	9,507 16 6	U.S. America -	774 13 8	10,778 10 1	U.S. America -	770 4 8				
			Foreign States -	0 10 0		Danish W.Indies	10 0 0		Foreign W.Indies	33 8 10				
			Germany - -	62 3 6		Foreign States -	6 14 0							
						Hayti - -	11 0 0							
			Total - -	1,662 8 9		Total - -	802 7 8		Total - -	803 13 6				

No.	Commodity.	Year ended 31st March 1895.			Year ended 30th September 1889.			Year ended 30th September 1884.			Remarks.
		Total Value of Importation.	Value of Importations from Foreign Countries.		Total Value of Importation.	Value of Importations from Foreign Countries.		Total Value of Importation.	Value of Importations from Foreign Countries.		
45	Paper—*cont.*	£. s. d.		£ s. d.	£ s. d.		£ s. d.	£ s. d.		£ s. d.	
	(*b*) Hanging -	416 17 10	U.S. America -	24 11 2	459 5 0	U.S. America -	8 3 0	517 17 10	U.S. America -	92 4 8	
	(*c*) Other descriptions.	5,284 18 1	U.S. America -	2,918 10 8	4,262 17 8	U.S. America -	3,339 1 9	2,590 18 7	U.S. America -	2,475 12 0	
			Foreign States -	0 4 0		Foreign States -	21 9 4				
			Germany - -	93 7 4		Foreign W. Indies	9 19 1				
			Total - -	3,007 2 0		Total - -	3,370 10 2				
46	Pickles, vinegar and sauces (condiments and confectionery included).	18,267 19 7	U.S. America -	3,447 16 7	310 13 2	U.S. America -	276 14 3	328 17 8	U.S. America -	247 17 7	Only vinegar represented in 1889 and 1884. Other commodities now coming under 46 were included in Groceries and Confectionery in 1889 and 1884.
			China - -	1 4 10					France - -	11 18 4	
			Foreign States -	29 12 6							
			Foreign W. Indies	6 2 0							
			France - -	27 18 0							
			Germany - -	20 4 4							
			Hayti - -	5 6 9							
			Total - -	3,538 5 0					Total - -	259 15 11	
48	Plate and Plated Ware	5,513 6 11	U.S. America -	446 12 8	1,311 11 9	U.S. America -	174 12 6	1,022 6 3	U.S. America -	119 19 1	
			Foreign States -	1 10 0		Foreign States -	7 2 0		France -	5 5 10	
			France - -	6 10 7		Germany -	16 4 6				
			Germany -	5 15 0		Hayti - -	1 16 0				
			Total -	460 8 3		Total -	199 15 0		Total -	125 9 0	
49	Provisions :—										
	(*a*) Farinaceous substances.	7,570 18 1	U.S. America -	6,420 8 11	2,250 7 8	U.S. America -	1,548 14 6	1,014 10 8	U.S. America -	935 0 5	
			France - -	2 8 10		Foreign States -	1 7 0		France - -	11 12 6	
						Hayti - -	0 4 6		Foreign W. Indies	1 10 0	
			Total -	6,422 17 9		Total -	1,550 6 0		Total -	948 2 11	
	(*b*) Fruit -	2,674 3 1	U.S. America -	1,893 9 7	524 3 4	U.S. America -	497 5 6	595 4 11	U.S. America -	298 18 11	
			France - -	5 18 2					Foreign States -	16 10 0	
			Foreign W. Indies	75 0 0							
			Foreign States -	265 15 0							Fruits shown for 1889 and 1884 are cocoanuts, apples, grapes, peaches, and pears. Currants and raisins and all descriptions of preserved fruits are included in the 1895 return.
			Italy - -	0 10 0							
			Total -	2,240 12 9					Total -	315 3 11	

(e) Lard - -	4,392 14 4	U.S. America -	4,382 18 4	8,686 0 9	U.S. America -	8,672 16 7	10,892 16 4	U.S. America -	10,678 5 0	The decrease is due to the substitution of cotton seed oil for culinary purposes.
		Foreign States -	0 4 4		Foreign States -	3 2 11				
		Total -	4,383 2 8		Total -	8,675 19 6				
(d) Meats -	79,663 7 0	U.S. America -	75,506 18 5	51,387 7 2	U.S. America -	48,193 8 9	42,996 11 1	U.S. America -	40,028 11 11	
		Foreign States -	5 12 4		Foreign States -	53 4 10		Foreign States -	9 4 2	
		China - -	3 5 0		Hayti - -	2 4 6		Foreign W. Indies	57 3 6	
		France - -	2 0 0					France - -	6 7 0	
		Germany -	18 6 3					Germany -	4 18 6	
		Hayti - -	1 6 4					Hayti - -	2 1 10	
		Norway -	12 4 0							
		Total -	75,544 12 4		Total -	48,248 18 1		Total -	40,088 1 11	
(e) Milk, condensed	25,619 12 0	U.S. America -	767 17 5	10,343 6 3	U.S. America -	94 11 6	4,820 18 3	U.S. America -	1,862 12 10	Due to increased demand.
		Germany -	106 17 8							
		Norway -	4 0 0							
		Total -	878 14 8							
(f) Oils for food other than cotton seed.	226 9 5	U.S. America -	16 11 6	6 8 3	U.S. America	1 8 6	19 16 1	France - -	0 17 1	*See* No. 48.
		Foreign States -	0 4 0							
		France - -	4 2 9							
		Hayti - -	0 19 0							
		Total -	21 17 8							
(g) Rice - -	38,699 14 4	U.S. America -	6,356 3 0	43,888 14 1	U.S. America -	807 4 5	57,040 6 0	U.S. America -	1,237 15 2	
		Foreign States -	0 9 6		Foreign States -	1 16 0		Foreign W. Indies	5 15 11	
		Germany -	506 2 11		Hayti - -	1 4 7		Foreign States -	0 14 0	
		Hayti - -	0 2 5							
		Total - -	6,862 17 10		Total - -	810 5 0		Total - -	1,244 5 1	
(h) Tea - -	5,045 6 6	U.S. America -	205 16 0	2,902 11 4	U.S. America -	99 8 0	2,750 5 8	U.S. America -	443 12 6	Increased consumption.
		Foreign States -	19 11 6		Foreign States -	6 12 0		Foreign States -	3 3 2	
		Norway -	0 18 0							
		Total - -	226 5 6		Total - -	106 0 0		Total - -	446 15 3	
(i) Vegetables -	4,959 19 4	U.S. America -	2,428 15 9	4,145 18 3	U.S. America -	2,626 15 3	3,316 18 9	U.S. America -	1,673 18 4	
		Foreign States -	21 6 0		Foreign States -	22 14 0		Foreign States -	14 10 0	
		France - -	5 0 0		Foreign W. Indies	23 3 0		France - -	17 0 0	
		Germany - -	1 0 4		Hayti - -	8 10 0		Foreign W. Indies	46 7 6	
								Hayti - -	0 10 0	
		Total - -	2,456 2 1		Total - -	2,680 7 3		Total - -	1,752 5 10	

No.	Commodity.	Year ended 31st March 1895.			Year ended 30th September 1889.			Year ended 30th September 1884.			Remarks.
		Total Value of Importation.	Value of Importations from Foreign Countries.		Total Value of Importation.	Value of Importations from Foreign Countries.		Total Value of Importation.	Value of Importations from Foreign Countries.		
	Provisions:—*cont.*	£ s. d.		£ s. d.	£ s. d.		£ s. d.	£ s. d.		£ s. d.	
	(*h*) All others -	21,765 9 11	U.S. America -	4,814 5 0	6,589 11 2	U.S. America -	144 9 10	2,783 6 6	U.S. America -	40 1 1	Goods classified in 1895 as Provisions non-enumerated were shown under Groceries and Confectionery in 1889 and 1884.
			China - -	5 2 11		Foreign States -	1 0 0		Foreign States -	4 0 0	
			ForeignW.Indies	0 14 0		Germany - -	15 10 0				
			Foreign States -	58 2 1		Hayti - -	0 8 0				
			France - -	18 18 3							
			Germany -	51 13 5							
			Hayti - -	4 3 6							
			Total - -	4,947 19 2		Total - -	161 7 10		Total - -	44 1 1	
	Groceries and Confectionery	- - -	- - -	- - -	32,048 10 8	U.S. America -	3,759 1 0	19,192 17 0	U.S. America -	2,709 10 11	
						Foreign States -	105 5 0		Foreign States -	0 12 0	
						ForeignW.Indies	0 12 0		ForeignW.Indies	28 1 0	
						Germany -	4 11 0		France - -	247 9 1	
						Hayti - -	6 10 0				
						Total -	3,875 19 0		Total - -	2,985 13 0	
51	Salt - -	6,003 19 11	U.S. America -	447 7 0	7,884 11 1	U.S. America -	5 8 0	6,924 10 7	U.S. America -	188 0 6	
									ForeignW.Indies	0 1 0	
									Total - -	188 1 6	
56	Soap - - -	31,264 18 9	U.S. America -	7,167 2 2	27,824 4 3	U.S. America -	2,962 1 7	23,380 18 2	U.S. America -	879 16 6	
			Germany -	107 17 2					Foreign States -	0 18 0	
			Total -	7,274 19 4					Total -	880 14 6	
57	Spirits :—										
	(*a*) Brandy, gin, rum, whisky, and compounds.	18,949 6 2	U.S. America -	616 3 1	11,794 16 11	U.S. America -	206 5 1	9,429 5 2	U.S. America -	106 0 8	
			Foreign States -	26 7 10		Foreign States -	310 6 5		Foreign States -	51 8 5	
			France - -	13 2 0		France - -	203 7 6		France - -	831 5 5	
			Germany -	167 17 0		Germany -	47 3 10		Foreign W.Indies	55 3 2	
			Hayti - -	11 5 3		Hayti - -	8 4 3		Hayti - -	2 4 5	
			Danish W.Indies	50 3 0							
			Total -	884 17 1		Total - -	775 7 1		Total - -	1,046 3 1	

	(*b*) Perfumery, spirits, and other descriptions.	9,303 5 5	U.S. America -	2,769 15 8	6,028 10 5	U.S. America -	1,721 4 11	5,664 8 1	U.S. America -	1,109 17 4		
			Foreign States -	2 8 3		Fore.gn States -	25 13 9		Foreign States -	321 14 8		
			Foreign W. Indies	1 11 0		France - -	74 17 7		France - -	543 15 8		
			France - -	300 12 0		Germany -	20 0 0					
			Germany -	81 16 5		Hayti - -	2 16 0					
			Hayti - -	1 18 0								
			Total -	3,157 16 4		Total - -	1,844 12 3		Total - -	1,975 7 8		
58	Stationery other than paper.	2,113 3 3	U.S. America -	463 0 2	—	- - -	—	—	- - -	—		Included in 1889 and 1884 in Stationery, all descriptions of. *See* No. 45.
			Germany -	10 3 7								
			Total -	473 3 9								
59	Stones and slates:—											
	Slate by tale -	653 4 2	U.S. America -	618 7 10	247 9 11	U.S. America -	166 1 7	363 4 1	U.S. America -	224 18 10		
						Germany -	17 3 8					
						Total - -	183 5 3					
61	Sugar refined - -	9,085 7 11	U.S. America -	4,467 14 2	1,077 15 4	U.S. America -	852 1 2	1,668 18 4	U.S. America -	1,408 13 0		The exemption from duty by Law 1 of 1892 led to largely increased consumption of this article. It was expected that the duty would be reimposed in 1895, and importations from Germany were made in anticipation.
			Germany -	2,372 3 2		Foreign States -	2 2 8		Foreign States -	0 9 8		
									Foreign W. Indies	21 13 4		
									Hayti - -	0 14 8		
			Total -	6,839 17 4		Total - -	854 3 10		Total -	1,431 10 8		
62	Telegraphic and telephonic wire and apparatus.	778 16 7	U.S. America -	533 8 10	90 18 10	Danish W. Indies	5 0 0	520 9 4	Foreign W. Indies	17 0 0		
	Wines -	17,707 0 10	U.S. America -	1,046 12 7	19,721 15 5	U.S. America -	452 18 0	16,904 17 8	U.S. America -	40 8 0		
			Foreign States -	7 3 6		Foreign States -	285 19 0		Foreign States -	75 16 0		
			Foreign W. Indies	15 9 6		Foreign W. Indies	12 0 0		Foreign W. Indies	305 7 0		
			France - -	207 0 6		France - -	59 14 0		France - -	1,115 10 0		
			Germany - -	723 9 5		Germany -	264 19 8		Germany - -	1 18 0		
			Hayti - -	32 12 4		Hayti -	46 17 6		Hayti - -	73 2 0		
									Italy - -	0 6 0		
			Total - -	2,032 7 10		Total -	1,122 8 2		Total - -	1,612 9 0		
64	Wood and timber manufactured:—											
	(*a*) Creosoted railway sleepers.	9,106 0 6	U.S. America -	7,525 12 6	- -	- - -		—	- - -	—		Due to railway extension.
	(*b*) Hoops - -	424 6 4	U.S. America -	7 8 6	797 17 6	U.S. America -	156 9 7	1,591 9 11	U.S. America -	247 18 6		

No.	Commodity.	Year ended 31st March 1885.			Year ended 30th September 1883.			Year ended 30th September 1884.			Remarks.
		Total Value of Importation.	Value of Importations from Foreign Countries.		Total Value of Importation.	Value of Importations from Foreign Countries.		Total Value of Importation.	Value of Importations from Foreign Countries.		
	Wood and timber manufactured:—*cont.*	£ s. d.		£ s. d.	£ s. d.		£ s. d.	£ s. d.		£ s. d.	
	(*c*) Houses	76 0 10	U.S. America	76 0 10	—	—	—	—	—	—	
	(*d*) Pitch pine lumber.	35,546 2 8	U.S. America	35,369 12 8	17,530 2 10	U.S. America Foreign W. Indies	17,529 7 10 0 15 0 17,530 2 10	14,729 8 5	U.S. America	14,725 6 1	Partly due to railway extension and mainly to the extended building operations.
	(*e*) Shingles	8,694 10 0	U.S. America	8,434 0 0	6,223 6 8	U.S. America	6,017 9 6	6,847 1 0	U.S. America	5,386 18 1	
	(*f*) Shooks, staves and headings.	23,613 18 1	U.S. America Germany Total	22,860 1 6 359 0 6 23,219 2 0	10,955 18 1	U.S. America	10,367 2 2	24,219 4 0	U.S. America	20,058 10 2	
	(*g*) White pine lumber.	32,685 7 8	U.S. America Denmark Foreign States France Norway Total	25,728 16 10 1 3 5 55 18 6 3 15 3 0 3 6 25,790 2 6	21,899 11 6	U.S. America Brazils Foreign W. Indies Total	16,037 13 6 3 1 2 6 16 0 16,047 10 8	18,245 18 7	U.S. America Foreign States Foreign W. Indies Total	9,474 9 11 2 9 9 12 6 9 9,489 6 5	Same as (*d*).
	(*h*) Manufactures non-enumerated.	7,862 1 9	U.S. America Belgium Foreign States France Germany Hayti Total	4,398 18 3 112 2 0 1 14 0 2 3 3 2,156 5 1 0 14 0 6,671 17 0	3,629 11 5	U.S. America Foreign States Hayti Total	3,027 12 3 3 2 0 26 6 0 3,057 0 3	1,232 12 5	U.S. America	947 19 0	Due to importations of doors, window frames, cornices, jalousie blinds, and similar goods.

LEEWARD ISLANDS.

No. 7.

SIR F. FLEMING to MR. CHAMBERLAIN.

(Received August 19, 1896).

Government House, Antigua,
August 4, 1896.

SIR,

I HAVE the honour to transmit to you returns from Antigua, St. Kitts-Nevis, Dominica, and Montserrat, which I trust will furnish you with the information asked for in your despatch of the 28th of November last.

2. I have not as yet received the returns from the Virgin Islands, but the amount of information contained in them would be so insignificant that I consider it better to forward the returns of the other Presidencies without further delay.

3. I regret not to have been able to transmit these returns at an earlier date, but it was only by the last mail that I received the necessary information from Dominica.

I have, &c.,
F. FLEMING.

Enclosure 1 in No. 7.

ANTIGUA.

RETURN of LIST of COMMODITIES according to the INSTRUCTIONS contained in the SECRETARY OF STATE'S CIRCULAR DESPATCH of 28th November 1895.

No.	Commodity.	Total Value of Importations.			Value of Importations from Foreign Countries.				Remarks.
		1884.	1889.	1894.	Countries.	1884.	1889.	1894.	
		£	£	£		£	£	£	
1	Alkali	—	—	—	—	—	—	—	
2	Animals: Horses	340	201	107	French	—	—	—	Horses are cheaper and freight less from the United States of America.
					German	—	—	—	
					United States	300	—	93	
					Other	—	—	—	
					Total	300	—	93	
3	Apparel and slops	—	—	—	—	—	—	—	Included in No. 29.
4	Arms and ammunition of all kinds.	172	132	94	French	—	—	—	
					German	—	—	—	
					United States	84	3	—	
					Other	—	—	—	
					Total	84	3	—	
5	Bags, empty	105	1,199	1,647	French	—	—	—	Some of these are manufactured in Calcutta, but the bulk are made principally in Scotland, Dundee.
					German	—	—	—	
					United States	—	—	—	
					Other	—	—	—	
					Total	—	—	—	
6	Beer and ale	1,669	1,106	1,043	French	—	—	—	Importations from the United States of America are chiefly of bottled lager. Prices are equal with the United Kingdom, but the charges are lower, and the facility for getting goods from the United States of America is greater.
					German	—	—	—	
					United States	10	63	112	
					Other	—	—	—	
					Total	10	63	112	

LEEWARD ISLANDS.

No.	Commodity.	Total Value of Importations.			Value of Importations from Foreign Countries.				Remarks.
		1884.	1889.	1894.	Countries.	1884.	1889.	1894.	
		£	£	£		£	£	£	
7	Bread and biscuits	2,925	2,512	1,916	French -	—	—	—	Only fancy biscuits are imported from the United Kingdom. These valuations from the United States of America are chiefly of bread and biscuits in barrels.
					German -	—	—	—	
					United States	2,850	2,277	1,880	
					Other - -	—	—	—	
					Total -	2,850	2,277	1,880	
8	Bleaching materials	—	—	—	—	—	—	—	
9	Books, printed -	759	1,024	677	French -	—	—	—	
					German -	—	—	—	
					United States	8	389	53	
					Other - -	—	—	—	
					Total -	8	389	53	
10	Butter - -	2,613	2,563	2,641	French -	4	—	—	At least 50 per cent. of all butters entered as from the United Kingdom are of Danish and French origin, being put up in neat handy tins of 1 to 28 lbs., which keep much better than Irish butter, usually imported in wood. There is no reason why butter packed carefully in the United Kingdom should not keep as well in the Tropics as butter packed elsewhere, provided the same care is taken in having the tins clean and air-tight. Irish butter, to be had occasionally in tins, but never equal to Danish or French. Prices of home and foreign articles much the same, from 1s. to 1s. 3d., at port of shipment, according to size of tin. Cheap butter (butterine or oleomargarine) imported from the United States of America.
					German -	—	—	—	
					United States	785	722	364	
					Other - -	6	4	—	
					Total -	795	726	364	
11	Candles of all sorts	872	330	148	French -	—	—	—	Candles from the United States of America are cheap tallow. All sperm candles from the United Kingdom.
					German -	—	—	—	
					United States	741	172	10	
					Other - -	—	—	—	
					Total -	741	172	10	
12	Caoutchouc, manufactures of.	—	—	—	—	—	—	—	
13	Carriages and wagons, railway.	—	—	—	—	—	—	—	
14	Cement - -	223	413	449	France -	—	—	—	
					German -	—	—	—	
					United States	—	—	—	
					Other - -	—	—	—	
					Total -	—	—	—	
15	Cheese - -	1,100	812	743	French -	—	—	—	The United Kingdom cheese usually too rich to stand climate. American cheese, owing to low prices and short time procurable, is imported.
					German -	—	—	—	
					United States	1,059	765	624	
					Other - -	4	2	—	
					Total -	1,063	767	624	
16	Chemical products and dye-stuffs.	—	—	—	—	—	—	—	
17	Clay, unmanufactured.	—	—	—	—	—	—	—	
18	Clocks and watches	—	—	—	—	—	—	—	Cannot be given separately. American clocks imported. The United Kingdom cannot compete owing to prices.

No.	Commodity.	Total Value of Importations.			Value of Importations from Foreign Countries.				Remarks.
		1884.	1889.	1894.	Countries.	1884.	1889.	1894.	
		£	£	£		£	£	£	
19	Coals: (a) Coals, cinders, and fuel.	1,421	1,704	1,139	French -	—	—	—	
					German -	—	—	—	
					United States	7	—	—	
					Other - -	—	—	—	
					Total -	7	—	—	
20	Cordage and twine	860	611	544	French -	—	—	—	
					German -	—	—	—	
					United States	227	—	3	
					Other - -	—	—	—	
					Total -	227	—	3	
21	Corn: (b.) Wheat flour	19,753	15,792	17,583	French -	—	200	—	Low prices and regular communication with New York are main causes of supplies being chiefly drawn from the United States of America.
					German -	—	—	—	
					United States	19,022	14,493	16,733	
					Other - -	35	561	—	
					Total -	19,057	15,254	16,733	
22	Cotton yarn -	—	—	—	—	—	—	—	
23	Cotton manufactures.	17,528	19,367	16,580	French -	—	—	—	White calicos and muslins from the United Kingdom. The United States of America cannot compete in finish and prices. A few dyed from the United States of America, viz., brown, blue, and grey cloth and ducks, in which they excel. Subdivisions (c), (d), (e), all from the United Kingdom. American travellers visit Island frequently, but can only compete in ducks, &c.
					German -	—	—	—	
					United States	218	209	490	
					Other - -	—	2	—	
					Total -	218	211	490	
24	Earthen and chinaware.	911	1,270*	492	French -	16	35	52	* Year 1889 includes value of glassware.
					German -	—	—	—	
					United States	11	117	30	
					Other - -	—	2	—	
					Total -	27	154	82	
25	Fish: Herrings and pickled fish.	2,638	1,414	1,507	French -	—	—	—	The greater part of the values from the United States are from Newfoundland, British North America, passing through the United States of America.
					German -	—	—	—	
					United States	405	352	65	
					Other - -	—	6	—	
					Total -	405	358	65	
	Dried fish -	12,444	9,512	8,042	French -	—	970	—	
					German -	—	—	—	
					United States	539	535	2,067	
					Other - -	—	—	—	
					Total -	539	1,505	2,067	
26	Furniture, cabinet and upholstery wares.	1,107	538	565	French -	—	—	—	Chairs, tables, and other small articles of furniture of cheap description got from the United States of America. Drawing, dining, and bedroom furniture in walnut and mahogany from the United Kingdom, but small trade, owing to high freight and length of time makers take to execute orders. Bentwood furniture from Germany and Austria passing through the United Kingdom. Bentwood chairs being cheaper and stronger than cane seated chairs.
					German -	—	—	—	
					United States	258	85	159	
					Other - -	9	2	—	
					Total -	267	87	159	
27	Glass, i.e., glassware and glass of all sorts.	606	*	1,169	French -	—	—	—	*1889. Glassware included in No. 24 in 1889.
					German -	—	—	—	
					United States	74	—	152	
					Other - -	7	—	2	
					Total -	81	—	154	

No.	Commodity.	Total Value of Importations.			Value of Importations from Foreign Countries.				Remarks.
		1884.	1889.	1894.	Countries.	1884.	1889.	1894.	
		£	£	£		£	£	£	
28	Grease, tallow, and animal fat.	358	201	173	French -	—	—	—	
					German -	—	—	—	
					United States	—	—	15	
					Other - -	—	—	—	
					Total -	—	—	15	
29	Haberdashery and millinery.	10,816	9,837	11,616	French -	—	6	1	
					German -	—	—	—	
					United States	19	93	87	
					Other - -	35	—	6	
					Total -	54	99	94	
30	Hardware and cutlery.	5,704	6,261	4,633	French -	—	—	4	
					German -	—	—	—	
					United States	259	280	642	
					Other - -	—	6	1	
					Total -	259	286	647	
31	Hats of all sorts -	—	—	—	French -	—	—	—	Included in No. 29.
					German -	—	—	—	
					United States	—	—	—	
					Other - -	—	—	—	
					Total -	—	—	—	
32	Implements and tools of industry.	—	—	—	—	—	—	—	Included in No. 30, mainly from the United Kingdom.
33	Instruments and apparatus, surgical, anatomical, and scientific.	—	—	—	—	—	—	—	Included in No. 30.
34	Leather: (a) Unwrought, (d) Saddlery, &c. (c) Wrought of other sorts.	1,721	1,438	1,106	French -	—	—	—	(d) Little trade from the United States of America in low-priced harness, but cannot compete with the United Kingdom in better quality goods.
					German -	—	—	—	
					United States	45	51	35	
					Other - -	—	—	—	
					Total -	45	51	35	
	(b) Boots and shoes.	3,363	3,583	3,728	French -	—	—	—	Frequently travellers run through the Islands with samples of these, but hitherto they have not succeeded in displacing English manufactures to any appreciable extent.
					German -	—	—	—	
					United States	113	444	74	
					Other - -	—	1	2	
					Total -	113	445	76	
35	Linen and jute yarn	—	—	—	—	—	—	—	
36	Linen and jute manufactures.	—	—	—	—	—	—	—	
37	Machinery of all kinds.	2,952	5,195	2,228	French	—	—	—	
					German -	—	—	—	
					United States	—	15	26	
					Other - -	—	—	11	
					Total -	—	15	37	
38	Manures - -	1,926	7,507	4,991	French -	—	—	—	
					German -	—	—	—	
					United States	70	—	—	
					Other - -	—	—	—	
					Total -	70	—	—	

No.	Commodity.	Total Value of Importations.			Value of Importations from Foreign Countries.				Remarks.
		1884.	1889.	1894.	Countries.	1884.	1889.	1894.	
		£	£	£		£	£	£	
39	Medicines	1,157	1,268	1,057	French	—	—	—	Chiefly patent or quack medicines largely advertised, therefore imported from the United States of America.
					German	—	—	—	
					United States	384	274	252	
					Other	—	—	122	
					Total	384	274	374	
40	Metals	—	—	—	—	—	—	—	Included in No. 30.
41	Musical instruments.	297	285	228	French	—	—	—	Some from Germany and the Continent through the United Kingdom.
					German	—	—	—	
					United States	4	—	18	
					Other	—	—	1	
					Total	4	—	19	
42	Oil and floor cloth	—	—	—	—	—	—	—	
43	Oil, seed	—	—	—	—	—	—	—	
44	Painters' colours and materials.		—	—	—	—	—	—	Not classified separately.
45	Paper (other than hangings).	898	*	*	French	—	—	—	*Included in No. 58. Wrapping paper (yellow) of low quality and cheaper from the United States of America.
					German	—	—	—	
					United States	161	—	—	
					Other	—	—	—	
					Total	161	—	—	
46	Pickles, vinegar and sauces.	—	—	—	—	—	—	—	Included in No. 49.
47	Pictures	—	—	—	—	—	—	—	
48	Plate and plated ware.	309	346	537	French	—	—	—	
					German	—	—	—	
					United States	19	9	13	
					Other	—	—	—	
					Total	19	9	13	
49	Provisions, i.e., groceries, unenumerated.	2,620	2,069	2,504	French	135	46	2	Tinned and compressed beef, salmon, &c., mostly from the United States at prices with which no other country can compete.
					German	—	—	—	
					United States	291	233	649	
					Other	—	8	—	
					Total	426	287	651	
50	Rags, &c., for paper	—	—	—	—	—	—	—	
51	Salt	105	*	242	French	—	—	1	*Included in No. 49.
					German	—	—	—	
					United States	—	—	—	
					Other	7	—	6	
					Total	7	—	7	
52	Seeds of all sorts	—	—	—	—	—	—	—	
53	Silk, &c.	—	—	—	—	—	—	—	Included in No. 23.
54	Silk manufactures	—	—	—	—	—	—	—	
55	Skins and furs	—	—	—	—	—	—	—	
56	Soap	1,259	1,144	1,388	French	—	—	—	
					German	—	—	—	
					United States	64	2	27	
					Other	—	—	—	
					Total	64	2	27	
57	Spirits: Whisky	1,447	1,824	1,864	French	—	—	—	
					German	—	—	—	
					United States	—	—	68	
					Other	—	—	—	
					Total	—	—	68	

No.	Commodity.	Total Value of Importations.			Value of Importations from Foreign Countries.				Remarks.
		1884.	1889.	1894.	Countries.	1884.	1889.	1894.	
		£	£	£		£	£	£	
57	Spirits—*cont.*								
	Brandy	1,080	638	217	Nil.	—	—	—	
	Gin	676	483	835	French	8	8	165	
					German	—	5	—	
					United States	—	—	—	
					Other	408	333	133	Dutch.
					Total	416	341	298	
	Wine	1,054	462	818	French	22	13	60	
					German	—	—	—	
					United States	184	57	52	
					Other	—	—	—	
					Total	206	70	112	
	Liqueurs, &c.	8	4	28	French	—	—	2	
					German	—	—	—	
					United States	—	—	—	
					Other	7	—	—	
					Total	7	—	2	
58	Stationery other than paper.	*	930	1,165	French	—	—	—	These values include wrapping paper.
					German	—	—	—	
					United States	—	274	283	* Included in No. 45.
					Other	—	1	—	
					Total	—	275	283	
59	Stones and slates	—	—	—	—	—	—	—	
60	Grindstones, &c.	—	—	—	—	—	—	—	Included in No. 24.
61	Sugar, refined	446	130	96	French	—	—	—	United States refined sugar preferred now to English, as American is made from cane sugar and English principally from beet sugar.
					German	—	—	—	
					United States	177	50	67	
					Other	—	—	—	
					Total	177	50	67	
62	Telegraphic wire, &c.	—	—	—	—	—	—	—	
63	Umbrellas and parasols.	—	—	—	—	—	—	—	Included in No. 29.
64	Wood and timber, manufactured:								
	Staves	1,412	177	55	French	6	—	—	
					German	—	—	—	
					United States	1,124	177	—	
					Other	—	—	—	
					Total	1,130	177	—	
	Shooks	2,005	4,604	815	French	—	—	10	Low price and freight favour the United States.
					German	—	—	—	
					United States	1,902	3,988	289	
					Other	—	—	—	
					Total	1,902	3,988	299	

Enclosure 2 in No. 7.

ST. KITTS-NEVIS.

1	Alkali	—	—	—	—	—	—	—	Under 500*l.* (not imported).
2	Animals, horses	—	—	—	—	—	—	—	Under 500*l.*
3	Apparel and slops	—	—	—	—	—	—	—	Included in No. 29.
4	Arms and ammunition of all kinds.	—	—	—	—	—	—	—	Under 500*l.*

No.	Commodity.	Total Value of Importations.			Value of Importations from Foreign Countries.				Remarks.
		1884.	1889.	1894.	Countries.	1884.	1889.	1894.	
		£	£	£		£	£	£	
5	Bags, empty -	1,445	2,042	1,296	United States	66	247	307	Includes also "empty casks."
					French -	210	136	67	These are casks, not bags.
					Total -	276	383	374	
6	Beer and Ale -	1,691	1,658	1,177	French -	—	—	—	
					German -	—	—	—	
					United States	—	—	96	Lager beer.
					Other - -	—	—	—	
					Total -	—	—	96	
7	Bread and biscuits	1,048	1,186	1,965	French -	—	—	—	Pilot bread, soda biscuits, &c. Fine biscuits which come from England appear in our statistics under "groceries," and cannot now be distinguished.
					German -	—	—	—	
					United States	1,032	1,166	1,855	
					Other - -	—	—	—	
					Total -	1,032	1,166	1,855	
8	Bleaching materials	—	—	—	—	—	—	—	Not imported.
9	Books, printed -	*	621	*	French -	—	—	—	* Under 500*l.* in 1884 and 1894
					German -	—	—	—	
					United States	—	151	—	
					Other - -	—	—	—	
					Total -	—	151	—	
10	Butter - -	1,779	2,974	796	French -	—	—	—	Nearly all the "butter" used here comes from the United States. This (so-called butter) is cheap and not very bad, and as the people are poor, English butter is from its price unattainable, except by a few.
					German -	—	—	—	
					United States	1,631	2,716	35	
					Other - -	—	—	—	
					Total -	1,631	2,716	35	
11	Candles of all sorts	772	*	*	French -	—	—	—	* Under 500*l.* in 1889 and 1894. Cheap tallow candles from the United States. Candles of all kinds are being driven out by petroleum lamps.
					German -	—	—	—	
					United States	250	—	—	
					Other - -	—	—	—	
					Total -	250	—	—	
12	Caoutchouc, manufactures of.	—	—	—	—	—	—	—	Not imported.
13	Carriages and waggons, railway.	—	—	—	—	—	—	—	Not imported.
14	Cement - -	—	—	—	—	—	—	—	Under 500*l.*
15	Cheese - -	1,078	683	780	French -	—	—	—	Remarks about butter apply here. Only a few can afford English cheese, the sale is small, and it does not keep on account of climate—so importers import very little.
					German -	—	—	—	
					United States	1,040	647	614	
					Other - -	—	—	—	
					Total -	1,040	647	614	
16	Chemical products and dye stuffs.	—	—	—	—	—	—	—	
17	Clay, unmanufactured.	—	—	—	—	—	—	—	Not imported.
18	Clocks and watches	—	—	—	—	—	—	—	Included in 48.
19	Coals :—(a) Coals, cinders, and fuel.	1,258	759	772	French -	—	—	—	
					German -	—	—	—	
					United States	—	8	—	
					Other - -	—	—	—	
					Total -	—	8	—	

LEEWARD ISLANDS.

No.	Commodity.	Total Value of Importations.			Value of Importations from Foreign Countries.				Remarks.
		1884.	1889.	1894.	Countries.	1884.	1889.	1894.	
		£	£	£		£	£	£	
20	Cordage and twine	848	1,458	627	French	—	—	—	Includes "Naval Stores."
					German	—	—	—	
					United States	367	686	348	Lower freights and quicker execution of orders, enabling importers to keep smaller stocks and so trade on less capital causes the preference.
					Other	—	—	—	
					Total	367	686	348	
21	Corn: (*b*) Wheat flour	34,985	21,887	24,980	French	—	—	—	The English and Canadian flour is too good, costs too much, and does not keep in hot places. Freights are lower, orders (particularly petty ones) better executed, and travellers work up the trade with the United States. This remark applies generally.
					German	—	—	—	
					United States	33,234	20,411	24,703	
					Other	—	—	—	
					Total	33,234	20,411	24,703	
22	Cotton yarn	—	—	—	—	—	—	—	Not imported.
23	Cotton manufactures.	22,544	25,356	21,278	French	—	—	—	
					German	—	—	—	
					United States	78	156	171	
					Other	—	—	—	
					Total	78	156	171	
24	Earthen and china-ware.	1,581	1,398	1,092	French	—	28	9	There is no competition with England except in very common cheap glassware. Much of what comes from England is, however, "made in Germany."
					German	—	—	—	
					United States	266	179	165	
					Other	—	—	—	
					Total	266	207	174	
25	Fish: Herrings and pickled fish.	2,110	1,020	1,566	French	—	—	—	
					German	—	—	—	
					United States	423	133	163	(Really Canadian coming vid the United States of America.)
					Other	—	—	—	
					Total	423	133	163	
—	Dried	9,897	9,500	6,705	French	1,190	2,120	—	French, Provincial, St. Pierre, and Miquelon.
					German	—	—	—	
					United States	2,088	597	365	Canadian, mostly coming through the United States of America.
					Other	—	—	—	
					Total	3,278	2,717	365	Here again better working up of the trade enables New York to sell Canadian fish quicker and cheaper than it can be got from Canada.
26	Furniture, cabinet and upholstery wares.	—	—	—	French	—	—	—	
					German	—	—	—	
					United States	—	—	—	
					Other	—	—	—	
					Total	—	—	—	
27	Glass, *i.e.*, glass-ware and glass of all sorts.	—	—		—	—	—	—	Included in No. 24.
28	Grease, tallow, and animal fat.	—	—	—	—	—	—	—	Under 500*l.*
29	Haberdashery and millinery.	18,201	9,798	10,125	French	—	—		
					German	—	—	—	
					United Street	—	3	11	
					Other	—	—	—	
					Total	—	3	11	
30	Hardware and cutlery.	7,033	6,603	5,432	French	—	—	—	American tools and cutlery though inferior to English are neater and look better. Many "combination tools" and neat labour-saving appliances are imported from the United States of America.
					German	—	—	—	
					United States	176	344	361	
					Other	—	—	—	
					Total	176	344	361	

No.	Commodity.	Total Value of Importations.			Value of Importations from Foreign Countries.				Remarks.
		1884.	1889.	1894.	Countries.	1884.	1889.	1894.	
		£	£	£		£	£	£	
31	Hats of all sorts -	—	—	—	——	—	—	—	Included in No. 29.
32	Implements and tools of industry.	—	—	—	——	—	—	—	Included in No. 30.
33	Instruments and apparatus, surgical, anatomical, and scientific.	—	—	—	——	—	—	—	Included in No. 30.
34	Leather:								
	(a) Unwrought. (d) Saddlery, &c. (c) Wrought of other sorts.	1,773	2,257	1,118	French -	—	—	—	Cheap neat harnesses and saddlery from the United States of America; better quality, but expensive from England.
					German -	—	—	—	
					United States	147	119	74	
					Other -	—	—	—	
					Total -	147	119	74	
	(b) Boots and shoes.	4,806	2,874	2,838	French -	—	—	—	The same as above.
					German -	—	—	—	
					United States	253	23	230	
					Other -	—	—	—	
					Total -	253	23	230	
35	Linen and jute yarn.	—	—	—	——	—	—	—	
36	Linen and jute manufactures.	—	—	—	——	—	—	—	
37	Machinery of all kinds.	8,819	4,592	1,932	French -	—	—	—	
					German -	—	—	—	
					United States	—	—	49	
					Other -	—	—	—	
					Total -	—	—	49	
38	Manures - -	6,580	7,358	9,295	French -	174	247	14	Farm-yard manure from neighbouring French Colonies.
					German -	—	—	—	
					United States	806	—	1,294	Nitrate of soda (Chili viâ United States of America).
					Other -	—	—	—	
					Total -	980	247	1,308	
39	Medicines - -	1,630	1,386	896	French -	—	—	—	Patent medicines and quack remedies largely imported from the United States of America. All pure drugs and chemicals come from England.
					German -	—	—	—	
					United States	223	568	250	
					Other -	—	—	—	
					Total -	223	568	250	
40	Metals - -	—	—	—	——	—	—	—	Included in No. 30.
41	Musical instruments	—	—	—	French -	—	—	—	Under 500*l*.
					German -	—	—	—	
					United States	—	—	—	
					Other -	—	—	—	
					Total -	—	—	—	
42	Oil and floorcloth -	—	—	—	——	—	—	—	
43	Oil, seed - -	—	—	—	——	—	—	—	
44	Painters' colours and materials.	—	—	—	——	—	—	—	Not classified separately.
45	Paper (other than hangings).	—	—	—	——	—	—	—	Included in No. 58.
46	Pickles, vinegar, and sauces.	—	—	—	——	—	—	—	Included in No. 49.
47	Pictures - -	—	—	—	——	—	—	—	
48	Plate and plated ware.	—	—	—	——	—	—	—	Under 500*l*.
49	Provisions, *i.e.*, groceries unenumerated.	3,473	2,150	2,156	French -	—	—	10	"Canned" goods (preserved in tin), *e.g.*, salmon, beef, fish of sorts, fruits, are imported from the United States. The tins are neater, they are all self-opening, and many are usable for other purposes after being emptied.
					German -	—	—	—	
					United States	226	189	380	
					Other -	—	—	—	
					Total -	226	189	390	

LEEWARD ISLANDS.

No.	Commodity.	Total Value of Importations.			Value of Importations from Foreign Countries.				Remarks.
		1884.	1889.	1894.	Countries.	1884.	1889.	1894.	
		£	£	£		£	£	£	
50	Rags, &c., for paper.	—	—	—	—	—	—	—	
51	Salt - - -	—	—	—	—	—	—	—	Under 500*l.*
52	Seeds of all sorts -	—	—	—	—	—	—	—	
53	Silk, &c. - -	—	—	—	—	—	—	—	Included in No. 22.
54	Silk manufactures -	—	—	—	—	—	—	—	
55	Skins and furs -	—	—	—	—	—	—	—	Under 500*l.*
56	Soap - - -	2,043	1,834	1,632	French -	—	—	—	In 1894 fancy soap included in "perfumery." Here again cheapness is driving out quality. In 1884 the States sent $\frac{1}{20}$, in 1889 $\frac{1}{28}$, in 1894 $\frac{1}{5}$ of imports.
					German -	—	—	—	
					United States	40	66	304	
					Other -	—	—	—	
					Total -	40	66	304	
57	Spirits :— Whisky -	509	819	898	French -	—	—	—	
					German -	—	—	—	
					United States	—	—	—	
					Other - -	—	—	—	
					Total -	—	—	—	
	Brandy	1,169	785	614	French -	—	—	—	
					German -	—	—	—	
					United States	—	—	—	
					Other - -	—	—	—	
					Total -	—	—	—	
	Gin - -	1,194	3,305	2,642	French -	—	—	—	Messrs. Heunes, of Delfshaven, Holland, send a vessel twice a year loaded with gin. English gin costs more, and is little used. * Dutch.
					German -	—	—	—	
					United States	—	—	—	
					Other* - -	520	2,067	2,448	
					Total -	520	2,067	2,448	
	Wine - -	1,176	823	1,280	French -	28	70	—	
					German -	—	—	—	
					United States	15	—	—	
					Other -	—	—	—	
					Total -	43	70	—	
	Liqueurs, &c. -	—	—	—	French -	—	—	—	Under 500*l.*
					German -	—	—	—	
					United States	—	—	—	
					Other -	—	—	—	
					Total -	—	—	—	
58	Stationery other than paper.	499	606	623	French -	—	—	—	
					German -	—	—	—	
					United States	24	215	255	
					Other -	—	—	—	(Cheap straw paper for wrapping).
					Total -	24	215	255	
59	Stones and slates -	—	—	—	—	—	—	—	
60	Grindstones, &c. -	—	—	—	—	—	—	—	
61	Sugar, refined -	569	275	282	French -	—	—	—	
					German -	—	—	—	
					United States	367	180	279	"Martineau" and "Tate" cubes, neat lumps well put up. English crushed sugar is not as attractive looking.
					Other -	—	—	—	
					Total -	367	180	279	
62	Telegraphic wire, &c.	—	—	—	—	—	—	—	
63	Umbrellas and parasols.	—	—	—	—	—	—	—	Included in No. 29.

No.	Commodity.	Total Value of Importations. 1884.	1889.	1894.	Value of Importations from Foreign Countries. Countries.	1884.	1889.	1894.	Remarks.
		£	£	£		£	£	£	
64	Wood and timber: Manufactured staves.	—	—	—	French -	—	—	—	Under 500*l.*
					German -	—	—	—	
					United States	—	—	—	
					Other - -	—	—	—	
					Total -	—	—	—	
	Shooks -	1,995	10,644	2,422	French -	—	—	—	
					German -	—	—	—	
					United States	1,815	9,345	2,422	
					Other -	—	—	—	
					Total -	1,815	9,345	2,422	

Enclosure 3 in No. 7.

DOMINICA.

RETURN to show for the years 1884, 1889, and 1894 respectively, the VALUES of all ARTICLES imported into the PRESIDENCY of DOMINICA from any FOREIGN COUNTRY or COUNTRIES, the Value of which was 5 per cent. of the Total Value of that Article imported from all Sources, where the Total Value of the Imports of such Article was not less than 500*l.*

No.	Commodity.	Total Value of Imports. 1884.	1889.	1894.	Value of Importations from Foreign Countries. Country.	1884.	1889.	1894.
		£	£	£		£	£	£
10	Butter - -	1,308	1,224	1,632	United States -	910	920	1,284
					French ports - -	320	94	14
					Total - -	1,230	1,014	1,298
21	Corn, (*b*) Wheat, flour -	9,634	6,219	6,048	United States -	9,634	6,219	5,947
24	Earthenware - -	—	654	618	United States - -	—	8	52
					Danish ports -	—	—	2
					French ports - -	—	344	280
					German ports -	—	33	—
					Total - -	—	385	334
28	Grease, tallow, and animal fat.	752	724	742	United States -	477	587	631
					French ports - -	5	3	2
					Dutch ports - -	—	1	—
					Total - -	482	591	633
34	Leather, (*b*) Wrought, boots and shoes.	—	—	1,423	United States -	—	—	377
					French ports - -	—	—	9
					Total - -	—	—	386
37	Machinery, (*b*) Other than steam engines.	583	—	1,144	United States - -	63	—	43
					Dutch ports - -	—	—	19
					French ports - -	96	—	228
					Total - -	159	—	281

No.	Commodity.	Total Value of Imports.			Value of Importations from Foreign Countries.			
		1884.	1889.	1894.	Country.	1884.	1889.	1894.
		£	£	£		£	£	£
49	Provisions (other) :—							
	(*a*) Beef and pork -	1,238	768	817	United States - -	747	620	500
					French ports -	38	7	1
					Total - -	785	627	501
	(*b*) Rice - -	—	—	574	Danish ports -	—	—	152
					Dutch ports - -	—	—	8
					French ports -	—	—	5
					Total - -	—	—	165
61	Sugar, refined	721	—	845	United States -	450	—	381
					French ports - -	5	—	—
					Total - -	455	—	381
62	(*a*) Wine - -	878	747	720	French ports - -	569	440	495
64	Wood and timber, manufactured :—Staves and empty casks, and unenumerated.	908	1,292	1,026	United States -	—	275	267
					Danish ports - -	18	0	—
					Dutch ports - -	—	4	—
					French ports - -	67	154	—
					Total - -	85	442	267

REPORT.

July 18, 1896.

10. BUTTER.—Under this head is included oleomargarine and similar compounds. Prior to the year 1892 no distinction was made in either the rate of duty or the Customs classification between butter and its substitutes, it has therefore been thought preferable to avoid any distinction in the last column of the return. The imports of the year to which that column refers, viz., 1894, were as follows :—Butter, 361*l.*, oleomargarine, &c., 940*l.*, but even these figures are not to be regarded as strictly reliable as there is reason for believing that a large proportion of what was entered as butter, and paid duty as such, was in reality only a very good imitation.

Oleomargarine and most of the inferior butter imported comes exclusively from the United States, either directly or otherwise. The better kinds of butter are obtained from the United Kingdom, but are entirely of Continental origin, chiefly Danish.

The price of oleomargarine averages 5½*d.* per lb., that of inferior butter varies from 9*d.* to 1*s.* 3*d.*, and table butter fetches about 1*s.* 1*d.*

Oleomargarine, &c., is imported in tins of 5 lbs., 10 lbs., and 25 lbs. respectively, packed in cases of 50 lbs. or 100 lbs. each to suit the requirements of the individual importers.

Butter obtained viâ the United Kingdom is always put up in 1 lb. and 2 lb. pans enclosed in outer packages of 100 lbs. net weight.

Up to within the last few years the inferior French butters imported viâ Martinique were exclusively used for culinary purposes, but with the decline of trade between the two Islands, the increased facilities for trade with the United States, and the efforts made by means of large consignments and in other ways to push the cheaper American article into use has effectually superseded the former and has proved itself better suited to the necessities of the large bulk of consumers.

21. CORN.—(*b*) *Wheat Flour.*—The price of American flour averages 19*s.* 6*d.* per barrel of 196 lbs.

The grade of flour imported here costs about 4 dollars or 16*s.* 8*d.* per barrel in New York, and is found most suitable to the requirements of the local trade, being cheap, sound, and wholesome.

Since the establishment of a subsidized line of steamers between the Dominion of Canada and the West Indies attempts have been made by means of consignments from that country to place Canadian flour upon our market; but the general opinion is that the flour of wheat grown in such high latitudes lacks the power of resisting the effects of a tropical climate which is possessed by the American product.

I am not aware that any attempt has ever been made to introduce European flour; but it is unlikely, regard being had to the cost of freight and the time occupied in its transportation, that it could ever compete seriously with the established article.

24. EARTHENWARE.—The above heading in the Customs statistical returns includes also all kinds of glassware, the exact proportion of which to the whole cannot be ascertained; but it is evident that neither of these two classes of goods would by itself comply with the conditions entitling it to a place in the return.

The imports from foreign countries may be said to consist almost exclusively of goods of French manufacture, and to comprise the culinary and other utensils peculiar to the French islands with a small percentage of crockery and china.

A small quantity of glassware has recently found its way into the market from the United States; but it is of a very inferior quality and the proportion to the general imports is not likely to increase.

28. GREASE, TALLOW, AND ANIMAL FAT.—This consists almost entirely of lard, the produce of the United States, the remainder consisting of machine grease and similar compounds chiefly imported by owners of estates for their own use.

The price of lard is about 30*s.* to 35*s.* per 100 lbs. It is put up in tins of 5 lbs., 10 lbs., and 25 lbs. each, packed in boxes or crates of 100 lbs.

No data exist for comparing the relative value or suitability of English and American lard, as the latter is alone in the market.

Other kinds of grease are obtained chiefly, if not exclusively, from the United Kingdom.

34. LEATHER.—(*b*) *Wrought Boots and Shoes.*—The retail prices, inclusive of a duty of 12½ per cent., can alone be given in respect of this article, and these vary from 5*s.* to 25*s.* a pair for ordinary men's boots.

The facilities afforded by quick and regular steam communication with the United States, the fact that orders are more promptly filled in that country than in England, and the neater finish of boots of any given grade are all factors in the development of a trade in this line of goods.

The advantages of the American article are, however, restricted to male footwear; the English ladies' shoe suffers little, if any, competition.

37. MACHINERY.—(*b*) *Other than Steam Engines.*—With the exception of a few sewing machines and other inconsiderable trifles from the United States, there is no trade in foreign machinery. The items appearing under the head "French ports" for 1884 and 1894 represent second-hand sugar machinery (inclusive of the steam engine, the value of which as distinct from the remainder, cannot be ascertained), imported under exceptional circumstances.

49. PROVISIONS (Other):

(*a*) *Beef and Pork.*—These two articles are placed under one head in the Customs returns. They are of exclusively American production. With the exception of an occasional hundred weight or so for private use, no attempt has been made to introduce the product of any other country.

The price of beef is from 30*s.* to 40*s.* the 100 lbs., and of pork about 35*s.* the 100 lbs.

(*b*) *Rice.*—The transactions shown for 1894 are probably due to some exceptional causes and need not be considered.

61. SUGAR, refined.—Practically the whole of the extra-Colonial trade in this article is with the United States, and the same causes which operate in favour of other goods of American origin apply in this case also.

The price of sugar varies with the description, but may be taken at an average for all kinds of 32*s.* 6*d.* per 100 lbs.

63. (*a.*) WINE.—The wine imported from foreign countries is derived exclusively from France, and consists almost entirely of light cheap Bordeaux.

The price varies very considerably, ranging from 45*s.* to 80*s.* per cask of 45 gallons.

64. WOOD, &c.—The foreign imports here shown represent almost entirely empty packages imported by agriculturists for exportation with their own produce. Practically no wooden manufactures are imported for the purposes of sale.

Facilities for trade with the United States are being constantly improved. There is a regular steam service with New York, which affords cheap and rapid transport for goods, the time occupied being about 10 days, and the rates of freight averaging 16*s.* 8*d.*

per ton. This cheap freight would alone offer a strong incentive to trade with the United States, the only foreign country to which reference need be made. But there are other circumstances which, in the competition against English goods, tell in favour of the former. Not the least of these is the rapidity with which orders can be executed and the goods placed upon the local market. The advantage of a saving of time of several weeks is too obvious to need comment. Other inducements to extend the trade with New York are to be found in the lowness of the invoice charges and the readiness with which the shipping houses of that city accord their best attention and most favourable terms to even the smallest indents. Trade is also, to some extent, forced by the system of consigning goods in considerable lots to local firms for sale.

As will be seen the trade with foreign countries, notably the United States, in so far as it comes within the scope of the Return, is mainly confined to provisions and heavy goods. English textile goods, and manufactures generally, are not seriously affected by such competition.

W. H. PORTER,
Treasurer.

Enclosure 4 in No. 7.

MONTSERRAT.

July 28, 1896.

RETURN showing the VALUE of all ARTICLES imported into the PRESIDENCY of MONTSERRAT from any FOREIGN COUNTRY or COUNTRIES, whenever the Value of any Article so imported from any Foreign Country, or Countries, was 5 per cent., or upwards of the Total Value of that Article imported into the Presidency from all Sources, whether within or without the British Empire, and when the Total Value of that Article imported was not less than 500*l*.

No.	Commodity.	Total Value of Importation.			Value of Importation from Foreign Countries.			
		1884.	1889.	1894.	Countries.	1884.	1889.	1894.
		£	£	£		£	£	£
21	(*b.*) Wheat flour - -	2,954	2,600	3,973	United States -	446	2,015	1,303
49	Pork - - - -	1,098	1,202	1,242	United States -	58	1,050	555
64	Wood and timber manufactured. Staves and empty casks and unenumerated.	1,796	1,039	548	United States -	520	746	355
					French Colonies -	250	—	—

Remarks.

The articles specified in the foregoing return are the only articles of import which come within the description given in the Secretary of State's despatch.

21. (*b.*) FLOUR.—Although only a comparatively small portion of the imports of flour appears in the return as coming from the United States, the whole of the imports of that article in the years included in the return came from that country either direct or by way of Antigua, St. Kitts, or Barbados.

In the years 1892 and 1893 some importations of flour were received from the Dominion of Canada, but this importation had entirely ceased in 1894, and has not up to the present time been recommenced. In 1892 and 1893, the Pickford and Black line of steamers trading between Canada and the West Indies called regularly at this Island, but whether from the small trade of the island being an insufficient inducement, or from other reasons, this was discontinued, and the steamers do not call here on the outward journey, and on the homeward journey only when they are offered sufficient cargo to make it worth their while to call. The Canadian flour was not liked locally, the impression being that its was not dried as well and did not keep as long as flour from the United States.

49. PORK.—As in the case of flour, the whole of the imports of this article come from the United States, either direct or through other islands. There were some importations of pork, as well as of some other articles which do not come into this return, such as butter, cheese, &c., from Canada, but these have ceased since the Canadian steamers stopped calling here.

64. Wood and Timber Manufactured.—Staves and empty casks and unenumerated.—The importation of staves and shooks has very largely diminished of late years owing to the substitution of bags and flour barrels for tierces and hogsheads, as the packages in which sugar is shipped. The shooks now imported are principally for limejuice. These have always come from the United States. Leeward Islands.

Edward Baynes,
Commissioner.

WINDWARD ISLANDS.

Windward Islands.

No. 8.

Sir CHARLES BRUCE to Mr. CHAMBERLAIN.

(Received March 5, 1896.)

Sir, Grenada, February 20, 1896.

With reference to your despatch of the 28th November last, relative to the mutual trade of the United Kingdom and the Colonies, I have the honour to transmit returns for the colonies under my government.

2. The return for Grenada is accompanied by a memorandum by the Colonial Secretary, Mr. Drayton, who prepared it.

3. The return for St. Lucia was prepared by the Treasurer and transmitted to me by Administrator Gouldsbury's covering Despatch of 7th instant. A package containing patterns from St. Lucia is forwarded in the Colonial Office bag, addressed to the Secretary, London Chamber of Commerce, in accordance with the instructions in Annex 2 of your despatch.

4. The return for St. Vincent was prepared by the Treasurer and transmitted to me with a memorandum by Administrator Thompson.

I have, &c.,
CHARLES BRUCE.

Enclosure 1 in No. 8.

Grenada.

The Colonial Secretary to the Governor.

His Excellency,

I have experienced some difficulty in obtaining the information required by the Secretary of State for the Colonies in his despatch of the 28th November 1895, respecting foreign imports into Grenada, (1) because of the imperfect classification and other defects of the trade returns of the colony, and (2) because it is well known that some of the imports appearing in those returns as coming from Great Britain and from British colonies really come from foreign countries. Before last year there was no detailed official classification of imports, so that the trade returns for the years referred to by the Secretary of State merely follow the grouping of the tariff, with the result that all imports not charged with a specific duty, including such important items as hardware, clothing, glassware, &c., are lumped together. As nothing short of a reconstruction from the original entries of the returns for the three years could cure this defect, I have been compelled not to rely wholly on the published returns but to resort to my own experience of the trade of the colony, carefully checked by consultation with some of the principal merchants. I feel confident, however, that the returns which I now annex represent a fair statement of the facts in connection with foreign imports into Grenada for the years 1884, 1889, and 1894.

In addition to the return of articles coming within the limitations imposed by paragraph 3 (*a*) of the Secretary of State's despatch, I have thought it useful to append a list of certain other articles now imported from foreign countries as indicating, in connection with that return, the articles of general consumption here emanating from foreign sources.

Edward Drayton,
Colonial Secretary.

Grenada, 19th February 1896.

WINDWARD ISLANDS.

GRENADA.

RETURN of certain IMPORTS into GRENADA in the Years 1884, 1889, and 1894, required by the SECRETARY of STATE'S DESPATCH of 28th November 1895.

No.	Commodity.	Year.	Total Value of Importation.	Value of Importation from Foreign Countries.	
			£		£
7	Biscuit and bread -	1884	1,092	United States America - -	1,013
				Foreign West Indies, probably French.	2
				Total - -	1,015
—	—	1889	1,236	United States of America - -	1,215
—	—	1894	1,272	United States of America - -	1,267
10	Butter. - -	1884	4,195	United States of America - -	831
				Other Foreign Countries (Denmark, France, and Italy, viâ United Kingdom).	3,364
				Total - -	4,195
—	—	1889	2,708	United States of America - -	615
				Other Foreign Countries (Denmark, France, and Italy, viâ United Kingdom).	2,093
				Total - -	2,708
—	—	1894	1,503	United States of America - -	165
				Other Foreign Countries (Denmark, France, and Italy, viâ United Kingdom).	1,338
				Total - -	1,503
21 *b*	Wheat flour - -	1884	16,493	United States of America - -	16,491
				Foreign West Indies - -	2
				Total - -	16,493
—	—	1889	22,430	United States of America - -	22,430
—	—	1894	22,878	United States of America - -	22,878
21 *c*	Corn of other kinds (oats, maize, &c.).	1884	3,268	United States of America - -	2,415
				Foreign West Indies, probably French.	4
				Total - -	2,419
—	—	1889	2,819	United States of America - -	1,241
—	—	1894	3,477	United States of America - -	2,297
28	Grease, tallow, and animal fat (lard).	1884	2,268	United States of America - -	2,074
				Foreign West Indies, probably French.	1
				Total - -	2,075
—	—	1889	2,071	United States of America - -	2,050

No.	Commodity.	Year.	Total Value of Importation.	Value of Importation from Foreign Countries.	
			£		£
—	—	1894	1,848	United States of America - -	1,646
49	Provisions not otherwise described.	1884	5,224	United States of America - -	402
				Foreign West Indies - -	23
				Total - -	425
(1)	Rice - -	1889	4,462	United States of America - -	39
—	—	1894	5,477	Nil.	—
(2)	Meal, corn, oil, and oat.	1884	1,396	United States of America - -	905
—	—	1889	1,006	United States of America - -	976
—	—	1894	1,313	United States of America - -	1,194
57	Spirits, gin - -	1884	915	Holland, viâ United Kingdom and other places.	915
—	—	1889	910	Holland, viâ United Kingdom and other places.	910
—	—	1894	1,008	Holland, viâ United Kingdom and other places.	1,008
61	Sugar, refined -	1884	761	United States of America -	707
—	—	1889	1,730	United States of America - -	1,633
—	—	1894	1,886	United States of America - -	1,842

Grenada, 19th February 1896.

EDWARD DRAYTON,
Colonial Secretary.

REMARKS on RETURN of certain IMPORTS into GRENADA in the years 1884, 1889, and 1894, required by the SECRETARY of STATE'S DESPATCH, of the 28th November 1895.

No. 7, BISCUIT and BREAD.—The description of biscuit imported from the United States of America is not represented, so far as can be ascertained, by any corresponding article of British manufacture. It is a plain unsweetened biscuit made of white flour, about the size of a crown piece, and the price in bond averages about 7*s.* per barrel of 70 lbs. weight. It is known as a "cracker," and is largely consumed in most West Indian colonies by the labouring and middle classes. Navy bread, both brown and white, is also imported from the United States, but not in such quantities as crackers. Sweet and fancy biscuits are exclusively imported from Great Britain.

No. 10, BUTTER.—The greater quantity of butter imported appears in the trade returns as coming from the United Kingdom, but, as a matter of fact, it is all foreign, and comes from Denmark, France, Italy, and the United States of America. It is unfortunately impossible to give the exact proportion coming from each source, except in the case of the United States. It will be observed that not only is the quantity coming from that country dwindling, but that the total import of butter is gradually

diminishing. This is due to the fact that oleomargarine and butterine from the United States are rapidly taking its place with the lower classes, who also consume an annually increasing quantity of so-called olive oil from foreign sources, which is believed to be made in France from the ground-nut of Africa and the West Indies. The Danish butter imported is 1*s.* 6*d.* per lb. in bond, that from Italy is 1*s.* 2*d.* per lb. and the French 1*s.* 7*d.* per lb. The United States variety is known as "Goshen" butter, and is very cheap, 5*d.* to 8*d.* per lb. in bond.

The price appears in this case to be a factor in favour of the foreign article, combined with the fact that long years of habit have accustomed the consumers to the particular brands mentioned, so that an attempt to place British butter on the market now would be more or less of a venture which merchants do not seem inclined to risk.

21 (*b*), WHEAT FLOUR.—This is exclusively of United States origin, the quantity consumed not being obtainable from any other neighbouring country except Canada. Moreover, the conditions affecting trade generally with the United States are in many respects so favourable when compared with other places that they deserve special notice. In the first place the rates of freight are from 25 per cent. to 50 per cent. cheaper than from Great Britain or Europe, a barrel of flour costing only 2*s.* 1*d.* from New York to Grenada, and then again, there is a direct steamer service twice a month between the two places, bringing them within six days of each other, so that merchants can renew their stock more frequently and purchase smaller supplies at one time. There is also a difference of 1*s.* 0½*d.* per word of telegrams in favour of New York, as compared with London, and the rate of exchange is almost always favourable, being usually $4.87 for the pound, and having occasionally reached $4.89. Added to these inducements, it is asserted by many merchants that the American exporter shows a greater disposition to make his wares suit the requirements of the market than is done by his British competitor.

As stated above, the only country that can apparently enter into competition with the United States, so far as flour is concerned, is Canada, and it is obvious that the absence of a direct steamer service is a drawback at the outset. Further, it is stated by an influential firm here, who opened negotiations with Canada a few years back, that Canadian exporters are unwilling to risk consignments of flour with the view of developing the trade, and that, as the market for United States flour is already well established here, importers will not venture to invest money in experimenting with the Canadian variety.

The "St. Lawrence" and "Knickerbocker" brands of United States wheat flour are the favourites here, and their average price in bond is about 16*s.* 8*d.* per barrel of 192 lbs. net.

21 (*c*), CORN, OTHER KINDS.—Under this head there is a considerable importation of maize or Indian corn, and a smaller quantity of oats from the United States of America. The price of the former in bond is 5*s.* per bag of 1 cwt., and of the latter 5*s.* 4*d.* per sack of three bushels. In regard to maize, no similar British product appears to be displaced by its importation, and there is only cause for regret that local agriculturists do not grow sufficient Indian corn to meet the wants of the colony. British oats, however, were being displaced by the American variety, which is not their equal in weight and quality, up to the end of 1894; but early in 1895 a direct trade in oats was opened with Prince Edward's Island, and these appear to be steadily taking the place of both American and British oats in the colony. The price in bond of each description is stated to be as follows:—

	s.	*d.*
British oats (4 bushel sack) - - - -	13	4
Prince Edward Island (ditto) - - - -	9	0
United States of America (3 bushel ditto) - -	5	4

It is evident that here the conditions operating against the British product are, firstly, the difference in price, and, as regard the American oat, the cheaper freight and other facilities in connection with the New York trade referred to under No. 21 (*b*); possibly, too, the smaller sack has its inducements to purchasers in an island where transport is not always easy. There is a special advantage in point of freight from Prince Edward Island, as shipments are made thence here direct by sailing vessels. Locally, the Prince Edward Island oats are sold at 14*s.* 6*d.* per sack, as compared with 17*s.* 6*d.* to 18*s.* for English oats.

28. GREASE, TALLOW, and ANIMAL FAT.—Under this head lard comes within the limits of the Secretary of State's inquiry, and it appears that a cheap product of the United States of America, known as lard compound, fills the market to the almost entire exclusion of British lard, which is only consumed by the better classes. With the labourers, lard oil from the United States is used quite as much, if not more than lard compound, the bond price of which is 1*l.* 5*s.* per 100 lbs., a rate with which, it can easily be seen, good lard can never compete successfully.

49. PROVISIONS NOT OTHERWISE DESCRIBED :—

(1.) RICE.—As will be seen from the return, 1884 was the only year in which the foreign importation of this article exceeded 5 per cent. of the total imports, and in 1894 it ceased entirely.

(2.) MEAL.—As this article comes within the conditions laid down it has been included in the return, but there is really no competition with British products in connection with its importation, as corn meal, the meal of the maize or Indian corn, forms the bulk of the imports from the United States of America under this head. The bond price is 12*s.* per barrel.

57. SPIRITS.—Gin is the only item that meets the conditions, and, with the exception of a few dozen bottles per annum of Plymouth or Warrington gin, is exclusively imported from Holland, either direct, or through the United Kingdom and British Colonies. The brand most generally consumed is that of J. H. Henkes, of Delftshaven.

61. SUGAR, REFINED.—This is exclusively imported from the United States of America, bond price 21*s.* 2*d.* per 100 lbs. The explanation given by the merchants of their reasons for preferring this to British refined sugar is, firstly, cheaper freight and other facilities already referred to in connection with the New York trade, and, secondly, that the British variety does not please the consumers and does not stand the effects of the climate so well as the American, which is of a coarser grain and appears to retain its whiteness better and to absorb less moisture than that refined in England.

EDWARD DRAYTON,
Colonial Secretary.

Grenada, 19th February 1896.

RETURN of CERTAIN other ARTICLES IMPORTED into GRENADA from FOREIGN SOURCES.

UNITED STATES OF AMERICA.

Foodstuffs :—
- Pickled beef.
- Pickled pork.
- Pickled tongue.
- Tinned salmon.
- Tinned lobster.
- Tinned oysters.
- Tinned beef.
- Tinned tongues.
- Oleomargarine and butterine.
- Cheese (United States "Gloster").
- Hams (cheap).
- Lard oil.
- Cotton seed oil.

Wood, unmanufactured :—
- Pitch pine lumber.
- White pine lumber.
- Shingles—cypress, cedar, and spruce.
- Spars.

Wood, manufactured :—
- Oars.
- Cotton presses.

Tobacco, unmanufactured.
Pollard and bran.
Blocks, pulleys, and other ships' tackle, except rope.
Petroleum.
Pitch, tar, resin, and turpentine.
Wrapping paper, common.
Perfume—"Florida water."
Textile manufactures :—
- Cotton canvas and duck (used for sails).
- Blue denim (a species of cotton duck).

Hardware :—
- Shingling hatchets.
- Felling axes.
- Cut nails.
- Wire nails.

GERMANY.

"Florida water."
Wrapping paper, common.
Common tweeds.
Pianos.

Windward Islands. — Grenada.	Wine and brandy. Olive oil.	France. Sardines.

Norway and Sweden.
Matches.

Edward Drayton,
Colonial Secretary.

Grenada, 19th February 1896.

St. Lucia.

Enclosure 2 in No. 8.

Government House, February 7, 1896.

Sir,

With reference to the Secretary's of State's despatch of the 28th November last, I have the honour to transmit herewith to you the following returns:—

(1.) Return for 1884 of certain articles classified generally in accordance with the condensed classification used by the Board of Trade in the Annual Statistical Abstract for the exports of the United Kingdom.*
(2.) A similar return for the year 1889.*
(3.) A similar return for the year 1894.*
(4.) A comparative statement of the figures shown in the foregoing returns.
(5.) Notes on the foregoing returns embodying—
  (*a.*) Reasons which have in each case induced the importer to prefer a foreign article to similar goods of British manufacture.
  (*b.*) Price of foreign article in bond.
  (*c.*) Quality and finish of goods.
  (*d.*) Suitability of goods for the market.
  (*e.*) Comparison of cost of transport of goods from United Kingdom and foreign places.

2. In connection with the suitability of goods for the market, samples of goods in which the foreign style and pattern are preferred are forwarded to your Excellency by the present mail.

3. The returns, &c., have been prepared by the Treasurer and they would have been forwarded earlier but for some delay which occurred in obtaining the samples.

I have, &c.,
V. Skipton Gouldsbury.

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* Not printed.

No.	Commodity.	Place whence Imported.	1884. Total Value of Importation.	1884. Value of Importation from Foreign Countries.	1889. Total Value of Importation.	1889. Value of Importation from Foreign Countries.	1894. Total Value of Importation.	1894. Value of Importation from Foreign Countries.	Remarks.
			£ s. d.	£ s. d.	£ s. d.	£ s. d.	£ s. d.	£ s. d.	
6	Beer and ale in bottles	- - -	—		—		935 10 0		"Lager" is imported from the United States and Germany. The price in bond is 3s. 6d. per dozen pints. In 1884 the total value imported did not reach 500l. In 1894 the value from foreign countries did not amount to 5 per cent. of the importation.
		United States						67 17 6	
		France						—	
		Germany						55 18 3	
		Denmark						12 0 0	
		Foreign West Indies						15 0 0	
		Total						150 15 9	
9	Books, printed	- - -	—		553 13 9		—	—	Cheap paper editions are imported from the United States. Roman Catholic Church missals are imported from France. It was only in 1889 that the total value of books imported reached 500l.
		United States		—		6 12 5			
		France		—		39 15 9			
		Foreign West Indies		—		0 11 6			
		Total		—		46 19 8			
10	Butter	- - -	3,183 3 9		2,739 5 11		1,272 12 11		Most of the butter imported is Danish and Italian through the United Kingdom, and French direct from France. All the butter used for pastry, cakes, &c., is from France. Formerly a large quantity of common butter came from the United States, but now oleomargarine is imported instead. The prices in bond are :— Of butter— Danish - - 1s. 8d. per 1-lb. tins. Italian - - 1s. 7d. „ „ French - - 1s. 8d. „ „ Of oleomargarine from the United States, 4d. to 6d. per lb.
		United States		1,860 6 4		1,803 4 7		102 6 8	
		France		992 10 6		500 16 11		452 2 10	
		Germany		—		—		17 3 4	
		Sweden		—		10 0 0		—	
		Foreign West Indies		0 10 0		0 11 7		0 2 6	
		Total		2,853 6 10		1,814 13 1		571 15 4	
10a	Oleomargarine	United States - -	—	—	—	—	2,624 19 6	2,128 1 4	
11	Candles of all sorts	- - -	1,120 1 10		695 3 3		944 14 10		Tallow candles are imported wholly from the United States. Wax tapers are imported from France. The prices of those in bond are :— Tallow candles 5½d. per lb. in 5-lb. boxes. Wax tapers (fancy) 2s. per lb.
		United States		378 18 9		293 16 8		399 6 4	
		France		—		21 1 11		22 10 0	
		Foreign West Indies		1 0 3		0 14 4		1 5 0	
		Total		379 19 0		315 12 11		423 1 4	

No.	Commodity.	Place whence Imported.	1884. Total Value of Importation.	1884. Value of Importation from Foreign Countries.	1889. Total Value of Importation.	1889. Value of Importation from Foreign Countries.	1894. Total Value of Importation.	1894. Value of Importation from Foreign Countries.	Remarks
			£ s. d.	£ s. d.	£ s. d.	£ s. d.	£ s. d.	£ s. d.	
14	Cement	(United Kingdom)	—	—	—	—	834 10 0	559 13 4	This is included in the return because although it appears to have been all imported from the United Kingdom, as a matter of fact the greater part of it is now imported from Germany and Belgium. The cement from Belgium is found to be cheaper and just as good as that from other places. The prices in bond are :— From Germany - 7s. to 8s. From Belgium - 7s. to 8s.
15	Cheese	-	546 0 5		639 19 1		982 18 8		Most of the cheese imported is the common "Gloster" from the United States. The price of it in bond is from 7d. to 7½d. per lb. Besides this there is a small quantity of Swiss cheese imported, which costs 10d. per lb. in bond.
		United States		477 8 5		499 16 5		595 17 9	
		France		43 18 1		42 8 9		58 12 1	
		Holland		—		7 9 8		4 10 0	
		Foreign West Indies		3 4 1		8 9 6		20 17 11	
		Total		524 10 7		558 4 4		674 17 9	
19	Coals	-	4,185 5 7		—		31,019 11 7		The different kind of coals imported from the United States, and their respective cost landed here, is as stated hereunder :— "Berwind's Eureka" - 18s. 9d. per ton. "New River" - 18s. 5d. " "Pocahontas" - 18s. 6d. " In 1889 the value of coal imported from foreign countries did not reach 5 per cent. of the total value of coal imported.
		United States		325 0 0		—		5,914 11 3	
		Foreign West Indies		5 4 1		—		—	
		Total		330 4 1		—		5,914 11 3	
20	Cordage and twine	-	—		594 18 2		—	—	In 1884 the total value imported did not reach 500l., and in 1894 the value from foreign countries did not amount to 5 per cent. of the total. Fishing twine is largely imported from France, the quality being considered superior to that imported from the United Kingdom. Prices in bond 6d. and 1s. 7d. per dozen. Two samples sent.
		United States		—		1 13 11			
		France		—		27 17 8			
		Foreign West Indies		—		2 1 1			
		Total		—		31 12 8			
21	Corn : (a) Flour of wheat	-	11,142 14 8		18,161 13 3		13,078 7 5		All comes from the United States either direct or through Barbados. The price in bond is from three dollars and upwards per barrel.
		United States		10,642 4 2		12,810 2 11		11,679 14 8	
		Foreign West Indies		—		—		0 15 5	
		Total		10,642 4 2		12,810 2 11		11,680 10 1	

23 and 67	Cottons and woollens	- - -	19,185 16 8		19,940 8 5		24,347 15 0	
		United States		1,053 17 4		451 2 10		554 16 1
		France		225 16 10		1,110 0 6		2,472 13 10
		Germany		—		—		137 13 10
		Colon		—		6 19 5		—
		Foreign West Indies		70 19 6		—		2 17 10
		Other Places		18 0 10		—		—
		Total		1,368 14 6		1,578 2 9		3,168 1 7
24	Earthenware	- - -	874 14 6		872 6 11		721 14 5	
		United States		12 14 0		—		0 13 3
		France		112 0 7		178 2 9		213 8 4
		Austria		—		—		3 10 0
		Germany		—		—		42 7 9
		Holland		—		0 5 0		—
		Foreign West Indies		480 0 3		354 7 10		326 8 9
		Total		604 14 10		532 15 7		586 3 1
25	Fish, dried and salted	- - -	8,910 6 4		7,827 5 9		—	—
		United States		6,500 0 6		440 12 6		
		Foreign West Indies		10 2 6		5 3 0		
		Total		6,510 3 0		445 15 6		
26	Furniture	- - -	636 2 0		527 18 9		638 11 1	
		United States		82 4 1		72 4 2		106 18 11
		France		115 18 4		97 5 10		44 13 10
		Germany		—		14 10 5		—
		Foreign West Indies		222 14 9		21 10 10		28 17 3
		Total		420 17 2		205 11 3		180 10 0

Canvas and duck are imported from the United States, where they are obtained cheaper and of better quality than in the United Kingdom. Boston blue duck is a speciality of the Bondsville Dye Works Company of Boston, and is largely imported here. One merchant says, "I have tried several times to get the identical "stuff in England, but the quality has always "been of a much lighter make. I am at a "loss to understand how it is that England has "not been able to compete with America in "this line, as there is a very large quantity of "it imported here." Black merino and cashmere are imported from France, where they are got cheaper and of better quality than in the United Kingdom. Common cotton tweed is imported from Germany and cannot be got in the United Kingdom. Prices in bond are:—
Cashmere, 7*d.* to 1*s.* per yard; canvas, 9*d.* to 10*d.* per yard; duck, 4½*d.* to 6½*d.* per yard; black merino, 1*s.* 2*d* to 2*s.* 6*d.* per yard; cotton tweed, 6*d.* per yard. Seventeen samples sent.

Ordinary plates, mugs tureens, and dishes are imported from Bordeaux, France, as they are cheaper, of better finish, and more stylish than the English makes. A variety of earthenware utensils for domestic purposes are imported from Martinique, but are manufactured in France. The prices in bond of these above-mentioned articles are:—
Plates, 1*s.* to 2*s.* 4*d.* per dozen; mugs, 1*d.* to 6*d.* each; tureens, 2*s.* 6*d.* each; dishes, 4*d.* to 3*s.* each; utensils from Martinique, 3*s.* per set.

This article comes exclusively from Nova Scotia, through the United States and Barbados. In 1894 the fish is returned as principally imported through Barbados. The price in bond is from 2*l.* 5*s.* to 5*l.* per cask of four hundredweight.

Chairs for ordinary use are imported from the United States. Bentwood furniture is imported from Austria through the United Kingdom. The furniture imported from France is usually for personal use and not for sale. The prices in bond are:—
Chairs from the United States, 3*s.* 3*d.* each; bentwood chairs from Austria, 3*s.* 9*d.* to 5*s.* 6*d.* each.

No.	Commodity.	Place whence Imported.	1884. Total Value of Importation.	1884. Value of Importation from Foreign Countries.	1889. Total Value of Importation.	1889. Value of Importation from Foreign Countries.	1894. Total Value of Importation.	1894. Value of Importation from Foreign Countries.	Remarks.
27	Glassware	-	£ s. d. 664 11 8	£ s. d.	£ s. d. 592 0 10	£ s. d.	£ s. d. —	£ s. d. --	In 1894 the total value imported did not reach 500*l.* Lamp chimneys are chiefly imported from the United States. Common thick drinking glasses are imported from France, and different styles of fancy glasses through Martinique. Liqueur sets and flower vases are largely imported from Germany through the United Kingdom. Prices in bond are:— Glasses, from ½*d.* to 5*d.* each; vases, 1*d.* to 4*s.* 6*d.* according to style; liqueur sets, 2*s.* to 3*s.* 6*d.*
		United States		62 0 11		25 11 8			
		France		58 13 11		110 4 5			
		Foreign West Indies		101 2 4		59 13 3			
		Total		221 17 2		195 9 4			
29, 63	Haberdashery	-	7,293 13 4		8,066 14 8		10,806 8 10		Ladies' parasols and umbrellas are imported from France. Handkerchiefs and clothing, tweeds, ribbons, ties, combs, cheap socks, and ready-made clothing are got from Germany. Straw hats, braces, &c., come from the United States. The above can be obtained in smaller quantities from foreign countries and are put up better. The prices in bond are:— Ladies' umbrellas, 2*s.* to 10*s.* each; socks, 4*s.* 3*d.* to 12*s.* per dozen pairs; Handkerchiefs, 1*s.* 1*d.* to 1*s.* 9*d.* per dozen; ready-made clothing, from 5*s.* a suit upwards; straw hats, 8*d.* each; braces, 6*d.*; tweeds, 5*s.* to 6*s.* 6*d.* per yard; ribbons, 1½*d.* to 7*d.* per yard; ties, 6*d.* to 1*s.* each; combs, 6*d.* each; 18 samples sent.
		United States		43 11 8		51 2 2		104 14 6	
		France		1,850 10 0		1,928 1 2		1,886 15 0	
		Germany		—		10 0 0		1,034 7 8	
		Austria		—		—		13 2 9	
		Arabia		—		—		0 2 9	
		Ecuador		—		—		30 14 5	
		Colon		—		40 3 5		—	
		Foreign West Indies		211 18 2		125 13 4		126 1 1	
		Other Places		52 1 7		—		—	
		Total		2,158 1 5		2,155 10 1		3,195 18 2	
30	Hardware	-	4,948 5 0		2,824 13 2		2,067 5 0		Cheap bolts and hinges are imported from the United States. They are a different make to what can be imported from the United Kingdom. Common locks come from France and are sold at 1*s.* each. They are superior in make to the locks from the United Kingdom, and are much cheaper. One great objection to the common dead locks imported from England is that out of a dozen locks all the keys are the same, so that they suit every lock. In the case of the locks imported from France this is not so, as each lock has a different pattern of key. Germany is making great efforts to get the hardware trade. Large
		United States		309 9 8		283 6 1		132 2 9	
		France		705 7 11		57 10 7		37 14 7	
		Brazil		—		—		0 10 0	
		Foreign West Indies		321 0 9		42 1 8		5 2 9	
		Total		1,335 19 4		382 18 4		175 10 1	

									quantities of samples come continually from that place. The prices in bond are:— Bolts from the United States, 4½d. each; hinges from the United States, 1s. 8d. per dozen; locks from France, 8d. to 9d. each.
30a	Nails	United States	691 15 1	10 9 4	—	—	—	—	In 1889 and 1894 the total value of importation did not reach 500l. In 1884 "Paris points" were imported from France, now they are imported from Germany. The prices in bond are:— Paris points from Germany, 1½d. per lb. Do. France, 1½d. per lb.
		France		137 9 7					
		Total		147 18 11					
31	Hats and bonnets	United States	1,847 10 0	33 9 8	—	—	—	—	Since 1884 these articles have been included under the head of haberdashery.
		France		265 10 4					
		Foreign West Indies		83 9 0					
		Other Places		48 5 4					
		Total		430 14 4					
32 & 37	Implements and machinery for agricultural purposes.	United States	16,788 6 1	—	13,197 5 6	41 15 8	—	—	In 1884 a large quantity of machinery was imported for the sugar factories. In 1894 the value imported from foreign countries did not come up to 5 per cent. of the total value imported.
		France		5,255 15 6		193 16 8			
		Foreign West Indies		86 18 0		72 9 9			
		Total		5,342 13 6		308 2 1			
34	Leather—Boots and shoes	United States	3,527 16 0	220 2 4	3,866 19 11	—	4,997 6 8	404 6 8	Cheap boots and shoes are imported from the United States. A large quantity of ladies' cloth boots is imported from France. These are better finished and cheaper, and the cloth used is superior to what is got from the United Kingdom. The prices in bond are— Boots and shoes from the United States, 4s. to 5s. per pair. Ladies' cloth boots from France, 3s. to 10s. per pair.
		France		1,384 5 5		721 16 8		1,319 15 0	
		Germany		—		16 6 1		—	
		Colon		—		0 16 8		—	
		Foreign West Indies		74 8 6		0 14 6		2 10 0	
		Other Places		10 0 6		—		—	
		Total		1,688 16 9		739 13 11		1,726 11 8	
38	Manure	United States	4,052 16 8	506 5 0	—	—	—	—	In 1889 no manure was imported from foreign countries. In 1894 the total value from foreign countries did not reach 5 per cent. of the total.
		Foreign West Indies		38 14 8					
		Total		544 19 8					

No.	Commodity.	Place whence Imported.	1884. Total Value of Importation.	1884. Value of Importation from Foreign Countries.	1889. Total Value of Importation.	1889. Value of Importation from Foreign Countries.	1894. Total Value of Importation.	1894. Value of Importation from Foreign Countries.	Remarks.
39	Medicines		£ s. d. 1,106 19 11	£ s. d.	£ s. d. 1,084 16 3	£ s. d.	£ s. d. 812 0 9	£ s. d.	The following drugs are imported from France because they cannot be got in the United Kingdom, viz.:— Vinaigres des 4 Voleurs, costing in bond here 1*d.* per oz. Alcolat Valvar Blanc, costing in bond here 1*d.* per oz. Eau de Carme or Eau Mellisse, costing in bond here 1*d.* per oz. Elixir Antiglaireux, costing in bond here 1*s.* 8*d.* per 1-pint bottle. Boule des Mars, costing in bond here 9*d.* per oz. Beaume Tranquille, costing in bond here 1*d.* per oz. Otherwise it is chiefly proprietary or patent medicines that are imported from foreign countries. The following are got from the United States, viz.:— Lung Balsam, costing in bond here 8*d.* per bottle of 4 ozs. Pymy Pectoral, costing in bond here 8*d.* per bottle. Canadian Healing Oil, costing in bond here 8*d.* per bottle. Pain Killer, costing in bond here 6*d.* per 2-oz bottle. Condition Powders, costing in bond here 7*d.* per pack. Ross' Pills, costing in bond here 3*l.* 6*s.* 8*d.* per gross. Williams' Pink Pills, costing in bond here 4*l.* per gross. The following are imported from France :— Syrup de Flore, costing in bond here 1*s.* a bottle. Syrup de Choux, costing in bond here 1*s.* 2*d.* a bottle. Syrup de Nafé, costing in bond here 1*s.* 4*d.* a bottle.
		United States		210 10 3		199 7 6		72 3 0	
		France		205 1 0		72 18 4		98 6 9	
		Foreign West Indies		95 17 8		58 10 7		22 16 3	
		Total		511 8 11		330 16 5		193 6 0	
40	Metals, Iron: (*a*) Railroad of all sorts	France	1,370 0 0	133 5 6	—	—	—	—	In 1884 railroad apparatus were imported for the sugar factories. In 1889 and 1894 the total value imported did not reach 500*l.*

43	Oil, seed: Olive, cotton seed, &c.	- - -	2,866 3 9		—	—	1,528 10 5	In past years various kinds of oil were imported as "Olive oil," as that commanded the best price, but since 1892, when the McKinley Tariff came into force making "Cotton seed oil" free, that oil has been imported to the exclusion of the so-called "Olive oil." The cotton seed oil comes from the United States. The price of cotton seed oil in bond is 1s. 6d. per gallon.
		United States - -		806 12 7		--		1,480 19 11
		France - -		971 13 1		—		23 7 9
		Foreign West Indies -		832 8 10		—		—
		Total -		2,610 14 6		—		1,504 7 8
49	Provisions not otherwise described:—							
	(a) Preserves - -	- - -	—		505 5 0		1,026 15 6	Corned beef in tins is imported from the United States. Truffled sausages, petit pois, sardines, asparagus, and champignons are imported from France. The prices in bond are:— Corned beef, 5d. per 1-lb. tin. Petit pois, 5d. to 7d. per tin. Sardines, from 2s. 4d. per dozen. Asparagus, 10d. to 1s. 6d. per tin. Champignons, 3½d. to 7d. per tin. Truffled sausages, from 1s. to 3s. per tin.
		United States - -		—		96 10 5		119 17 2
		France - -		—		84 16 8		49 15 10
		(Germany) - -		—		—		—
		Foreign West Indies -		—		0 10 10		4 2 8
		Total -		—		181 17 11		173 15 8
54	Silks and satins - -	- - -	—		964 16 9		—	In 1884 and 1894 the total value of the importation did not reach 500l. Silk foulards, handkerchiefs, and silk materials for dresses are largely imported from France. The prices in bond are:— Foulards, 8d. to 1s. 9d. each. Handkerchiefs, 8d. to 1s. 9d. each.
		France - -		—		693 3 4		—
		Colon - -		—		2 10 0		
		Foreign West Indies -		—		8 15 7		
		Total -		—		699 8 11		
56	Soap - - -	- - -	1,157 6 1		—	—	—	In 1889 and 1894 the value of soap from foreign countries did not reach 5 per cent. of the total amount imported. In 1884 some soap was imported through the United States.
		United States - -		138 17 1				
		Foreign West Indies -		5 1 10				
		Total -		138 18 11				
57	Spirits: Absinthe, brandy, rum, and whisky	- - -	1,826 4 0		1,158 12 3		1,571 1 2	Absinthe and brandy are imported from France. Gin from Holland and all other spirits from the United Kingdom, sometimes through the United States. The prices in bond are:— Absinthe, from 7s. to 7s. 6d. per gallon. Brandy „ 5s. to 10s. „ Gin „ 3s. 6d. to 5s. „
		United States - -		46 1 6		5 8 5		38 6 0
		France - -		534 2 9		172 19 4		318 19 5
		Foreign West Indies -		13 17 4		12 4 0		4 17 0
		Other Places - -		78 18 6		—		—
		Holland - -		—		191 12 2		132 3 3
		Colon - -		—		1 8 0		—
		Total -		668 0 1		383 11 11		489 5 8
58	Stationery, including writing paper.	- - - -	579 4 0		—	—	—	In 1889 and 1894 the total value imported did not reach 500l. Since 1884 the use of writing paper from France has declined.
		United States - -		27 18 5				
		France - - -		227 8 8				
		Total - -		255 7 1				

No.	Commodity.	Place whence Imported.	1884. Total Value of Importation.	1884. Value of Importation from Foreign Countries.	1889. Total Value of Importation.	1889. Value of Importation from Foreign Countries.	1894. Total Value of Importation.	1894. Value of Importation from Foreign Countries.	Remarks.
			£ s. d.	£ s. d.	£ s. d.	£ s. d.	£ s. d.	£ s. d.	
61	Sugar, refined	- - -	709 5 11		605 2 0		—	—	In 1894 the total value imported did not reach 500*l.* Still all the refined sugar comes from the United States, and costs 2½*d.* per lb. in bond.
		United States		709 5 11		602 5 8			
		Foreign West Indies		—		0 3 1			
		Total		709 5 11		602 8 9			
62*a*	Tiles	- - -	1,005 6 8		—	—	—	—	In 1889 and 1894 the value imported did not reach 500*l.*
		France		126 6 5					
		Foreign West Indies		19 5 10					
		Total		145 12 3					
63*a*	Wines	- - -	2,657 18 3		2,151 15 5		2,407 0 10		Most of the wine imported comes from France. A common sherry is obtained from Hamburg. A cheap sweet wine has recently come from Spain. The prices in bond are :— Claret, 3*l.* 4*s.* to 10*l.* per cask; champagne, 10*s.* to 60*s.* per dozen quarts; white wine, 7*l.* to 10*l.* per cask; sherry, 6*l.* per cask of 58 gallons; sweet wine, 6*l.* per cask of 58 gallons.
		United States		—		24 13 9		—	
		France		1,580 5 5		1,664 15 0		1,417 8 9	
		Germany		—		—		11 5 10	
		Spain		—		—		171 18 0	
		Italy		—		—		0 2 11	
		Colon		—		5 0 10		—	
		Foreign West Indies		573 1 1		58 12 6		72 10 10	
		Total	—	2,153 6 6		1,753 2 1		1,673 6 4	
64 (*a*)	Wood and timber, manufactured Empty casks and puncheons.	- - -	926 2 10		972 0 4		733 18 0		Empty casks and puncheons are usually imported from Martinique, to be used in the exportation of molasses. With reference to the prices herein-before given of the articles imported from foreign places, I beg to state that the charges for cost of transport amount to the following percentages of the invoice cost of the goods in each case, viz. :— From the United Kingdom 10 to 15 per cent. „ Germany - 10 to 15 „ „ France - 20 to 35 „ „ United States - 5 to 10 „ In regard to the goods from the United States no charges are made for the packing cases used.
		Foreign West Indies		886 11 2		893 12 0		700 11 0	
		Total		886 11 2		893 12 0		700 11 0	

Treasury, St. Lucia, 4th February 1896.

D. G. GARRAWAY,
Treasurer.

Enclosure 3 in No. 8.

ADMINISTRATOR THOMPSON to GOVERNOR.

HIS EXCELLENCY,

RETURNS herewith. The result does not give any measure of the labour involved in preparing them, as in the end but few items can, under the terms of the despatch, be reported on.

I attach a minute by the Treasurer, who has had considerable experience, which shows the general course of trade in the West Indies.

HARRY THOMPSON,
21st January 1896.

RETURN of the VALUE of IMPORTS into the COLONY required by the SECRETARY of STATE'S DESPATCH of 28th November 1895.

No.	Commodity.	Year.	Total Value of Importation.	Value of Importation from Foreign Countries.	Remarks.
			£	£	
2	Animals - - -	1889	2,990	1,170	Chiefly mules from the United States. More cheaply obtained both in price and cost of transport, but no comparison possible.
		1894	1,556	742	
6	Beer and ale - -	1884	1,458	—	A small quantity only imported from the United States, and apparently as an experiment only.
		1889	1,015	12	
		1894	922	71	
7	Biscuit and bread -	1884	1,392	496	No comparison possible. The United States, from which the whole supply comes, is geographically the most natural source of the supply of food and feeding stuffs.
		1889	808	501	
		1894	898	467	
	Corn :—				
21	(*b*) Wheat flour -	1884	10,449	2,604	See remarks on No. 7.
		1889	7,970	3,429	
		1894	11,440	4,727	
	(*c*) Of other kinds -	1884	2,417	553	
		1889	1,577	582	
		1894	1,345	333	
24	Earthen and china ware, including manufactures of clay.	1889	356	63	A small quantity of rough utensils made locally in the neighbouring French islands is imported.
		1894	616	60	
30	Hardware and cutlery -	1889	3,952	54	A small quantity of American tools are being imported. Axes and fine-edge tools are stated to be of better quality and finish than those of English manufacture. Nails of all sorts are beginning to come in from America in small quantities, and are reported to be cheaper and better than the English ones.
		1894	2,390	140	
38	Manure - - -	1884	9,683	66	With the exception of sheep manure for garden purposes from neighbouring islands, this article comes almost entirely from England.
		1889	4,450	1,789	
		1894	1,131	216	
49	Provisions not otherwise described.	1889	8,046	1,624	Under this head has been put a large variety of articles—Tea, coffee, rice, salted beef, hams and bacon. The only considerable import from a foreign country is salted meat from the United States, which is the natural source of our food supply.
		1894	8,043	2,290	
51	Salt - - -	1884	177	111	Chiefly obtained from the neighbouring French and Dutch islands, but no comparison with English prices is possible.
		1889	364	211	
		1894	511	276	

No.	Commodity.	Year.	Total Value of Importation.	Value of Importation from Foreign Countries.	Remarks.
			£	£	
57	Spirits - - -	1889	1,792	524	The import from foreign countries is almost entirely "Hollands" gin from Holland.
		1894	3,092	586	
64	Wood and timber, manufactured staves and empty casks, and unenumerated.	1884	3,502	1,177	These are almost entirely American. They can be obtained more cheaply than by way of England.
		1889	4,504	2,825	
		1894	1,400	2	

THE CURRENT OF COMMERCE—ST. VINCENT.

The following memorandum may, I consider, be taken as a fair representation of the commerce of St. Vincent, and also, *pro rata*, of that of the other British West India Islands—as far as imports are concerned.

IMPORTS.

Countries of Origin.

GREAT BRITAIN:

- Clothing of all kinds, as silk, cotton, wool, waterproofs, and leather, and combinations of these - All
- Furniture of oak, rosewood, walnut, maple, birch, beech, and metal - All
- Earthen ware and china of all kinds - All
- Glassware - $\frac{4}{5}$ths
- Household goods:
  - Candles - All
  - Groceries - All
  - Preserves - $\frac{9}{10}$ths
  - Soap - All
  - Malt - All
  - Whisky and sweet gin - All
  - Brooms and brushes - $\frac{3}{4}$ths
- Hardware—Iron bars, rods, and rails; fishing gear; galvanized iron and utensils; pots, pans, and wire; agricultural and garden implements - All
  (With a few trifling exceptions.)
- Machinery of all kinds (except a few clever American inventions) - All
- Medicines - $\frac{9}{10}$ths
- Paper - $\frac{9}{10}$ths
- Ship building materials - $\frac{3}{5}$ths
- Stationery - All
- Textiles of every kind, except, to a small extent, cotton canvas from the United States - All

BRITISH COLONIES:

BRITISH NORTH AMERICA:

- Food stuffs:
  - Fish, pickled - All
  - Dried and salted - All
- Building materials:
  - Shingles - $\frac{1}{2}$
  - Lumber, pitch pine - $\frac{2}{3}$rds

INDIA AND CEYLON:

- Tea (*viâ* England) - All
- Rice (*viâ* Demerara, Trinidad, and Barbados) - All

WEST INDIES:

- Guiana—Hardwood - All
- Barbados:
  - Crystallized sugar - $\frac{9}{10}$ths
  - Muscovado sugar - All

JAMAICA:

- Cigars - $\frac{5}{6}$ths

United States:		
Animals—horses and mule	All	Windward Islands.
Building materials:		
Spruce pine, pitch pine, and white pine (deal) lumber	⅓rd	St. Vincent.
Shingles (cypress)	about ½	
Household goods:		
Matches	⅓rd	
Oil—kerosene	All	
Oleomargarine (*see* Food stuffs)	All	
Butter (*see* Food stuffs)	⅙th	
Soap	Fraction	
Furniture:		
Maple, deal, pine, walnut, and inferior woods, all of the cheapest kind	All	
Food stuffs:		
Bread	All	
Butter	⅙th	
Cheese	All	
Wheat flour	All	
Lard	All	
Meal of maize	All	
Meats:		
Beef or pork, salted	All	
Hams and bacon	⅔ths	
Oleomargarine (cotton seed stuffs)	All	
Sugar—refined	9/10ths	
Tobacco:		
Unmanufactured	All	

The foregoing information is susceptible of more simple classification as to form; but time does not admit of it. I therefore submit it as it is.

F. B. Griffith,
Treasurer.

Treasury, St. Vincent,
21st January 1896.

BARBADOS.

Barbados.

No. 9.

Sir J. S. HAY to Mr. CHAMBERLAIN.

(Received February 20, 1896.)

Government House, February 4, 1896.

Sir,

I have the honour, in accordance with your direction, to forward the enclosed return asked for in your despatch of 28th November 1895, respecting trade between the British Colonies, the United Kingdom, and foreign countries; together with a minute from the Comptroller of Customs and a letter from the Commercial Hall representing the principal firms to whom I forwarded a copy of your despatch.

2. The Chairman of the Commercial Hall informs me that the packages in which certain goods are shipped here from Canada are unsuitable to the requirements of the trade more especially with regard to the following items to which he refers as follows:—

Flour.—Comes packed in soft wood barrels or at least in barrels made of wood which appear to affect the keeping quality of the flour. Red oak is used by the United States.

Butter, Lard.—Comes in tubs, 25 lbs. and upwards. It is preferred in tins of 5, 10, and 25 lbs. each.

Beef.—Comes in barrels. Half barrels are preferred.

Cheese.—Is all right as to package, but is too good and therefore too expensive for the masses. Hardly good enough for the small upper class demand. Same remark might apply to butter, for really the masses do not use it at all. I think it right to bring this to your notice as you might think it expedient to draw the attention of the Canadian Government to it.

3. The information furnished is all I am at present able to obtain here on the various points referred to in your despatch.

I have, &c.,
J. S. HAY.

Enclosure 1 in No. 9.

Barbados.—Return showing the Value of Articles imported from Foreign Countries in cases where the value was 5 per cent. or upwards of the total value imported, and where the total value of the article imported was not less than 500*l*., 1884, 1889, 1894.

No.	Commodity.	1884. Total Value of Importation.	1884. Value of Importations from Foreign Countries.		1889. Total Value of Importation.	1889. Value of Importations from Foreign Countries.		1894. Total Value of Importation.	1894. Value of Importations from Foreign Countries.		Reasons which may have in each case induced the Colonial Importer to prefer the Foreign Article to similar Goods of British Manufacture.
		£		£	£		£	£		£	
2	Animals, living:—										
	(*a*) Oxen, bulls, and cows	11,592	Venezuela	1,758	13,184	Foreign West Indies	4,896	15,555	Foreign West Indies	5,695	
			Foreign West Indies	7,500		Dutch Guiana	16		Venezuela	3,561	
						United States	592		United States	663	
						Venezuela	392				
				9,258			5,896			9,919	
	(*b*) Sheep and lambs	1,592	United States	1,485	1,908	United States	1,071	2,918	Uruguay	147	
						Foreign West Indies	1		Venezuela	3	
						Dutch Guiana	1		Foreign West Indies	63	
									United States	1,869	
							1,073			2,082	
	(*c*) Horses, over 13½ hands high.	2,880	United States	1,520	6,475	United States	4,375	9,541	Uruguay	116	Our proximity to the United States will account for the preference for living animals thence, the risk on voyage being less.
			Hayti	20					United States	899	
									Brazil	29	
									Foreign West Indies	116	
				1,540						1,160	
	(*d*) Asses	Under £500 imported during these years.						562	Foreign West Indies	461	
	(*e*) Mules	7,757	United States	4,322	11,930	United States	10,810	7,665	United States	3,192	Same reason as horses.
			Monte Video	2,100		Buenos Ayres	1,120		Uruguay	4,462	
			Buenos Ayres	1,300							
				7,722			11,930			7,654	

6	Beer and Ale:—Malt in bottles	2,892	United States	265	3,119	United States Foreign West Indies	224 33 257	3,589	United States	185	
7	Biscuit (crackers) and bread (pilot and navy).	32,114	United States	31,950	19,708	United States	19,494	34,242	United States Foreign West Indies	34,045 2 34,047	
9	Books, printed	4,449	United States	798	4,268	United States Foreign West Indies	481 30 511	6,375	United States Foreign West Indies	708 15 723	
10	(a) Butter	47,944	United States France	33,695 165 33,860	20,884	United States France	12,073 432 12,505	Less than 5 per cent. from Foreign Countries during this year.			The bulk of the butter coming from the United Kingdom is really of French and other foreign manufacture. All that can be said of it is that it is suitable to the wants of the majority of the population.
		N.B.—Margarine and oleo-margarine were included with butter during this year.									
	(b) Margarine, oleo-margarine, and their compounds.	Included with butter during this year.			8,451	United States	8,292	11,842	United States Foreign West Indies Germany	10,905 12 8 10,925	
11	Candles, tallow	1,158	United States	819	886	United States	880	1,899	United States	1,156	
12	Caoutchouc, manufactures of	No head kept during these years.						948	United States	216	
13	Carriages, vehicles of pleasure	4,621	United States	3,255	2,864	United States	2,481	5,259	United States Foreign West Indies	3,967 27 3,994	Carriages (foreign) are no cheaper than the English, rather the reverse, but then the lightness and greater suitability to the climate cause them to have the preference.
15	Cheese	3,348	United States	2,496	2,594	United States	2,091	3,258	United States Foreign West Indies Holland	2,427 2 1 2,430	Cheese of a better description continues to be imported from the United Kingdom, there being a distinct preference.

No.	Commodity.	1884. Total Value of Importation.	1884. Value of Importations from Foreign Countries.		1889. Total Value of Importation.	1889. Value of Importations from Foreign Countries.		1894. Total Value of Importation.	1894. Value of Importations from Foreign Countries.		Reasons which may have in each case induced the Colonial Importer to prefer the Foreign Article to similar Goods of British Manufacture.
		£		£	£		£	£		£	
16	(a) Chemical products	No separate head kept during these years.			No separate head kept during these years.			1,405	United States Foreign West Indies Germany	278 4 11 293	
	(b) Sulphur	No separate head kept during these years.						725	United States	177	
	(c) Extracts, essences, &c.	No separate head kept during these years.						534	United States Foreign West Indies	199 7 206	
18	Clocks and watches	736	United States	95	762	United States Foreign West Indies	104 37 141	Less than 5 per cent. from foreign countries during this year.			
20	(a) Cordage, except twine	1,994	United States	207	2,838	United States	508	2,630	United States France	414 37 451	The manilla rope manufactured in the United States is of a much more flexible nature and of better finish than the English. It is dearer than the English. Other kinds of cordage imported here are chiefly of British manufacture. (Pattern sent.)
	(b) Twines	No head kept during these years.						672	United States	89	
21	Corn : (a) Corn or maize, unground	No separate head kept during these years.						44,869	United States Uruguay Foreign West Indies Buenos Ayres	37,540 43 7 5,986 43,576	
	(b) Wheat or rye flour	107,273	United States Foreign West Indies	106,780 8 106,788	93,772	United States	91,921	81,987	United States France Foreign West Indies	79,968 4 907 80,879	The flour of Canada has the reputation of not keeping long in tropical climates.

	(c) Corn meal	33,716	United States	33,181	35,379	United States	34,580	28,144	United States	28,103	
			Foreign West Indies	3					Foreign West Indies	34	
				33,184						28,137	
	(d) Grain, unenumerated		No separate head kept during these years.					20,580	United States	17,609	
									Foreign West Indies	5	
									Brazil	2	
									France	1	
										17,617	
	(e) Oats	22,109	United States	7,263	24,825	United States	12,607	32,973	United States	17,356	
	(f) Bran and pollard	1,897	United States	1,075	2,096	United States	491	8,530	United States	8,055	
			Monte Video	39		France	11		Uraguay	71	
				1,114			502			8,126	
25	Fish :										
	(a) Herrings, &c., pickled	4,076	United States	252	4,189	United States	476	4,434	United States	446	
			Teneriffe	3		Foreign West Indies	140		Foreign West Indies	2	
				255			616			448	
	(b) Fish, dried, salted, or smoked	58,121	United States	3,948	57,605	United States	11,533	57,280	United States	9,056	
			Teneriffe	4		Foreign West Indies	587		Foreign West Indies	1	
									France	2	
				3,952			12,120			9,059	
	(c) Salmon and oysters in tins		No head kept during these years.					2,695	United States	2,554	
26	Furniture and cabinet ware	5,049	United States	1,859	3,252	United States	790	4,803	United States	1,585	Foreign furniture is no cheaper than English, rather the reverse, but then the lightness and greater suitability to the climate cause them to have the preference.
			Foreign West Indies	62		Madeira	17		Foreign West Indies	9	
									France	2	
				1,921			807			1,596	
27	Glass :										
	(a) Lamps and lanterns		No head kept during these years.					1,016	United States	366	
									Dutch Guiana	2	
										368	

No.	Commodity.	1884. Total Value of Importation.	1884. Value of Importations from Foreign Countries.		1889. Total Value of Importation.	1889. Value of Importations from Foreign Countries.		1894. Total Value of Importation.	1894. Value of Importations from Foreign Countries.		Reasons which may have in each case induced the Colonial Importer to prefer the Foreign Article to similar Goods of British Manufacture.
27	Glass—*cont.*	£		£	£		£	£		£	
	(*b*) Other manufactures of	3,881	United States	505	3,226	United States	576	3,425	United States	237	
			Foreign West Indies	1					Foreign West Indies	8	
									France	3	
				506						248	
28	Grease: tallow	592	United States	256	668	United States	485	722	United States	621	
						Dutch Guiana	4		Foreign West Indies	3	
							489			624	
30	Hardware:										
	(*a*) Iron nails, spikes, and clinches.	4,415	United States	795	4,645	United States	829	6,674	United States	1,512	It has been known for some time past that the nails (especially coopers') sent out to this colony from the United Kingdom, are of foreign manufacture. They are triangular and round in place of square, and are lighter, and hence go further, *i.e.*, there are more nails in a pound, and thus suit the trade better. (Patterns of nails sent.)
									Foreign West Indies	1	
										1,513	
	(*b*) Sewing machines	No head kept during these years.						805	United States	442	
									Colon	4	
										446	
	(*c*) Other iron and steel manufactures.	18,266	United States	1,420	Less than 5 per cent. from foreign countries during this year.			18,393	United States	1,947	Tools, chiefly carpenters', are of much better finish than the English. Whether they are as durable is questionable.
			Foreign West Indies	5					France	220	
									Foreign West Indies	21	
				1,425						2,188	
34	Leather:										
	(*a*) Unwrought	Less than 5 per cent. from foreign countries during these years.						7,757	United States	470	
	(*b*) Saddlery and harness	1,118	United States	81	1,371	United States	75	3,207	United States	176	

37	Machinery and steam engines	Less than 5 per cent. from foreign countries during these years.						8,975	United States Foreign West Indies	560 13	573
38	Manure: (a) Nitrate of soda	9,590	Iquique	4,012	20,244	Peru	11,250	24,377	Bolivia Chili	17,226 5,500	22,726
	(b) Phosphate of lime and rock.	No head kept during these years.						2,618	United States	2,618	
	(c) Other kinds	Less than 5 per cent. from foreign countries during this year.			57,822	Buenos Ayres Foreign West Indies	485 13,500	41,160	Foreign West Indies United States Venezuela	4,230 5,775 77	10,082
							13,985				
39	Medicines	No separate head kept during these years.						4,308	United States	1,320	
43	Oils: (a) Cotton seed	No separate head kept during these years.						5,420	United States Foreign West Indies	5,265 5	5,270
	(b) Kerosine (petroleum)	23,982	United States	23,982	9,784	United States	9,784	8,794	United States	8,794	
	(c) Other kinds	Less than 5 per cent. from foreign countries during this year.			1,448	United States	613	4,001	United States	489	
44	Painters' colours and materials	2,188	United States	276	3,930	United States	341	Less than 5 per cent. from foreign countries during this year.			
45	Paper of wood and straw for wrapping.	No head kept during these years.						1,809	United States	1,114	
46	Pickles and sauces: (a) Sauces or condiments	No head kept during these years.						702	United States	42	
	(b) Succades: Fruit preserved	No head kept during these years.						2,759	United States Foreign West Indies Holland	303 2 5	310

No.	Commodity.	1884. Total Value of Importation.	1884. Value of Importations from Foreign Countries.		1889. Total Value of Importation.	1889. Value of Importations from Foreign Countries.		1894. Total Value of Importation.	1894. Value of Importations from Foreign Countries.		Reasons which may have in each case induced the Colonial Importer to prefer the Foreign Article to similar Goods of British Manufacture.
		£		£	£		£	£		£	
48	Plate and plated ware and jewellery.	Less than 5 per cent. imported from foreign countries.									
49	Provisions not otherwise described :										
	(*a*) Beef, salted, or pickled -	No separate head kept during these years.						17,888	United States - -	16,943	
									Foreign West Indies -	3	
									France - -	7	
										16,953	
	(*b*) Bacon and ham - -	No separate head kept during these years.						4,246	United States - -	2,584	Hams of a better description continue to be imported from the United Kingdom, there being a distinct preference.
	(*c*) Beef, preserved in cans -	No separate head kept during these years.						1,669	United States - -	1,686	
	(*d*) Pork, salted or pickled -	No separate head kept during these years.						34,409	United States - -	31,858	
									Brazil - - -	9	
										31,867	
	(*e*) Other meat in cans -	No separate head kept during these years.						533	United States - -	93	
	(*f*) Mutton, fresh - -	No separate head kept during these years.						512	United States - -	26	
	(*g*) Lard - - -	26,442	United States - -	25,783	9,930	United States - -	9,875	8,374	United States - -	8,856	
	(*h*) Cocoa, unground - -	Less than 5 per cent. from foreign countries this year.			3,406	United States - -	79	Less than 5 per cent. from foreign countries this year.			
						Dutch Guiana - -	131				
							210				
	(*i*) Cocoa, prepared - -	No head kept during these years.						1,331	United States - -	295	
									Venezuela - -	6	
										301	

(*j*) Confectionery - -	No head kept during these years.						1,053	United States - -	102	
(*k*) Coffee - - -	Less than 5 per cent. from foreign countries this year.			6,175	United States - -	1,158	8,816	United States - -	3,414	
					Foreign West Indies -	125		Brazil - - -	2	
					Venezuela - -	27		Foreign West Indies -	592	
								France - -	2	
								Venezuela - -	71	
						1,310			4,081	
(*l*) Farinaceous substances, manufactured.	No head kept during these years.						1,304	United States - -	617	
								Foreign West Indies -	1	
									618	
(*m*) Fruit, dried - -	No head kept during these years.						771	United States - -	42	
(*n*) Fruit and vegetables, fresh.	6,666	France - -	390	10,481	France - -	545	9,940	United States - -	664	
		United States - -	250		United States - -	1,224		Foreign West Indies -	119	
		Foreign West Indies -	37		Foreign West Indies -	19		France - -	199	
		Teneriffe - -	40					Teneriffe - -	398	
								Madeira - -	66	
								Holland - - -	8	
			717			1,788			1,449	
(*o*) Oilmeal and oilcake -	23,680	United States - -	22,937	26,357	United States - -	25,785	38,419	United States - -	37,788	
(*p*) Hay and straw - -	4,612	United States - -	2,192	2,820	United States - -	1,798	8,666	United States - -	6,503	
		Monte Video - -	40		France - - -	130		Uruguay - - -	99	
		Foreign West Indies -	8		Buenos Ayres - -	6		Dutch Guiana - -	1	
		France - -	16					Venezuela - -	5	
								Foreign West Indies -	117	
			2,251			1,934			6,725	
(*q*) Ice - - -	1,674	United States - -	1,250	3,520	United States - -	3,520	Less than 500*l.* imported this year.			
(*r*) Matches - - -	3,074	United States - -	2,605	2,527	United States - -	722	2,978	United States - -	821	
(*s*) Perfumery - -	2,804	United States - -	627	2,524	United States - -	1,105	2,687	United States - -	1,042	
					Foreign West Indies -	2		Foreign West Indies -	196	
						1,107			1,238	

No.	Commodity.	1884. Total Value of Importation.	1884. Value of Importations from Foreign Countries.		1889. Total Value of Importation.	1889. Value of Importations from Foreign Countries.		1894. Total Value of Importation.	1894. Value of Importations from Foreign Countries.		Reasons which may have in each case induced the Colonial Importer to prefer the Foreign Article to similar Goods of British Manufacture.
		£		£	£		£	£		£	
49	Provisions not otherwise described—*cont.*										
	(*t*) Cigars and cigarettes	1,117	United States Dutch Guiana Foreign West Indies	229 13 532	3,937	United States Foreign West Indies Dutch Guiana	767 1,754 5	3,009	United States Foreign West Indies Dutch Guiana Holland	695 274 16 29	
				774			2,526			1,014	
	(*u*) Manufactured tobacco	4,946	United States Foreign West Indies	4,622 112	5,150	United States	4,949	5,274	United States	4,829	
				4,734							
	(*v*) Leaf tobacco	1,270	Foreign West Indies United States	9 1,261	1,482	United States	1,449	842	United States United States, Columbia	579 207	
				1,270						786	
51	Salt	4,034	Foreign West Indies Venezuela United States	466 250 5	None from foreign countries this year.			8,890	Foreign West Indies United States	363 1	
				721						364	
57	Spirits;										
	(*a*) Brandy, whiskey, and liqueurs.	Less than 5 per cent. from foreign countries during these years.						8,256	Spain United States Foreign West Indies France United States, Columbia	310 137 6 1 2	
										456	
	(*b*) Gin	Less than 5 per cent. from foreign countries during these years.						2,604	Holland Dutch Guiana United States Foreign West Indies	326 103 91 1	
										521	

58	Stationery	5,090	United States	641	Less than 5 per cent. from foreign countries during these years.						
61	Sugar: (a) Refined	5,017	United States	4,960	1,314	United States	1,258	1,629	United States	1,284	
	(b) Crystalized, vacuum pan	612	Foreign West Indies	562	None from foreign countries this year.			Less than 500*l.* imported this year.			
64	Wood: (a) Pitch pine lumber		No separate head kept during these years.					15,469	United States	15,362	
									Foreign West Indies	7	
									Brasil	8	
										15,377	
	(b) Hoops, coiled or straight	17,121	France	6,557	14,290	France	5,101	8,169	France	1,598	
									Foreign West Indies	700	
										2,298	
	(c) Shingles	5,520	United States	406	6,919	United States	1,120	9,296	United States	1,826	
						Foreign West Indies	62		Foreign West Indies	3	
							1,182			1,829	
	(d) Staves	33,064	United States	31,123	62,406	United States	59,174	29,387	United States	27,755	
			Foreign West Indies	876		Foreign West Indies	438		Foreign West Indies	1,426	
				31,999			59,612			29,181	
	(e) Hardwood	1,849	Dutch Guiana	949	2,293	Dutch Guiana	844	2,697	Dutch Guiana	1,232	
			United States	20		Foreign West Indies	154		United States	26	
						United States	6		Venezuela	19	
									Foreign West Indies	128	
				969			1,004			1,405	
	(f) Spars, sweeps, and oars		Less than 500*l.* imported during these years.					1,018	United States	428	

Displacement of British Goods.

In this Colony very little displacement has taken place, as nearly all manufactured articles continue to come from the United Kingdom. The articles which so far are displacing British goods are canvas, cordage, nails, tools, carriages, and furniture (*see* remarks opposite each of these items in this return, except canvas, for which no separate head is kept). With regard to articles of food, the term "displacement" could hardly apply, seeing that the United Kingdom could not supply us with most of them. The Dominion of Canada, however, plays a not unimportant part therein, but yet, seeing that so many of its products come through ports of the United States, and of which no distinctive record is kept, it is impossible to say what is Canadian and what is Foreign American. Direct importations from British America may be said to be confined to cured fish, white pine, and spruce lumber, shingles, hay, and oats. The Canadians have not yet quite hit off the caprices of trade in the matter of packages of goods, such as butter, lard, beef, &c.

Water Carriage or Freight.

With reference to the important item of water carriage or freight, Foreign America must always have the advantage of the United Kingdom, and even over the nearest British American Colonies; for not only are the rates lower, but the opportunities from the United States are more frequent and more convenient. The rate of freight from the United States is often 9*d.* to 10*d.* per barrel, which is less than 7*s.* per ton measurement, and never over 10*s.*, whilst nothing comes from the United Kingdom at less than 15*s.* for rough goods, 25*s.* to 50*s.* per ton for finer, exclusive of a primage.

Enclosure 2 in No. 9.

Minute by the Comptroller of Customs.

Hon. Colonial Secretary,

The numbers appearing down the first column of the return (herewith forwarded) are the numbers referring to the commodity as given in the list annexed to the despatch (see Annex II., column 3, of the despatch). Where there are numbers left out in this return, which occur in the list just mentioned, it is that those items are not required to be dealt with, being either less than 500*l.* imported, or under 5 per cent. from foreign countries.

It will be observed that the information supplied in the return for the year 1894 is somewhat fuller than that for 1884 and 1889, for the reason that previously to 1892 goods were classified under four heads, but since that time the classification has been much extended and is more in accord with the British list.

All the information filled in in the column of reasons, and the remarks at the foot of the return have been culled from the report sent in by the chairman of the Chamber of Commerce.

So far as the question regards foodstuffs, it may be easily disposed of, as it is well known that the United States have always supplied the bulk of them, leaving the question to hinge more particularly on those items which could be supplied by the United Kingdom, and yet continue to come, to a great extent, from foreign countries. A glance at the return will show such items to be medicines, paper of wood and straw, matches, perfumery, refined sugar, sewing machines, and essences, in addition to the items dealt with by the Chamber of Commerce. It is to be regretted that no direct information can be obtained regarding some of the items just mentioned, but I think we may assign as the chief reason the difference in freight between Great Britain and America, which has been referred to in the report of the Chamber of Commerce.

Exports.

With regard to the request contained in column 7 of the despatch, the only item worth mentioning is sugar. It will, therefore, be sufficient to furnish the Right Hon. the Secretary of State for the Colonies with extracts from the latter part of the report of the Chamber of Commerce which relate to the question of exports.

Samples of sugar, matches (2), nails (3), and rope (2) herewith.

January 31, 1896. P. L. D.

Enclosure 3 in No. 9. BARBADOS.

LETTER from the CHAIRMAN of the COMMERCIAL HALL to the COLONIAL SECRETARY.

SIR, Commercial Hall, January 22, 1896.

I HAVE the honour to acknowledge the receipt of your communication of the 6th instant, covering a despatch from the Secretary of State for the Colonies asking for certain detailed information with regard to British and foreign trade in the Colonies. You also send me certain statistics compiled by the Comptroller of Customs in reference thereto, for which I am obliged.

Having laid same before the Committee of Commerce I am by them authorised to reply as follows:

It would appear from the forms annexed to the Secretary of State's despatch, that his chief anxiety is in the displacement in the trade of goods *manufactured* in the United Kingdom or British Colonies. In this Colony very little displacement has taken place.

With some few exceptions which I shall name presently, nearly all manufactured articles continue to come from the United Kingdom, such for instance, apparel of all kinds, boots and shoes, millinery, haberdashery, cotton, linen, silk, and woollen manufactures, glass, earthen, china, and hardware, machinery, manure, and metals; minerals, salt, beer, and soap also come from the United Kingdom.

The articles which so far are displacing British goods are canvas, cordage, nails, tools, carriages, and furniture.

(*a.*) The reason that American cotton canvas is supplanting English flax is, I think, mainly due to the fact that the sailing trade is now principally of United States or British American origin, and hence, although dearer, they prefer it. The English carrying trade is all done by steamers.

(*b.*) The manilla rope manufactured in the United States is of a much more flexible nature, and of better finish than the English. As in the case of canvas it is dearer, and possibly the same reason for giving it a preference exists. Other kinds of cordage are chiefly of English manufacture.

(*c.*) As regards nails, (more especially coopers') it has been known for some time past that the nails sent out to this Colony from the United Kingdom are of foreign manufacture. They are triangular and round, in place of square, and are lighter, and hence go farther, *i.e.*, there are more nails in a pound, and thus suit the trade better.

(*d.*) Tools, chiefly carpenters', are of much better finish than the English; whether they are so durable I am not prepared to say.

(*e.*) Carriages and furniture are no cheaper than English, rather the reverse, but then the lightness and greater suitability to the climate causes them to have the preference.

The Committee have no records at their disposal from which they could furnish the Secretary of State with the detailed information required under sub-section (*a*) paragraph 3 of his despatch. I regret, therefore, I can afford no information of comparative values.

But in all articles of food the condition of things is entirely changed, but the term "displacement" could hardly apply seeing that the United Kingdom could not supply us with most of them. The Dominion of Canada, however, plays a not unimportant part therein, but yet seeing that so many of its products come through ports of the United States, and of which no distinctive record is kept, it is impossible to say what is Canadian or British American, and what is Foreign American. Direct importations from British America may be said to be confined to cured fish, white pine and spruce lumber, shingles, hay, and oats. The flour of Canada has the reputation of not keeping long in tropical climates, nor have the Canadians yet quite hit off the caprices of trade in the matter of packages of other goods such as butter, lard, beef, &c.

The foodstuffs to which I allude as more distinctively Foreign American, are flour with its numerous by-products, corn with the same, salted meat, grain, butter, lard, and their various compounds. The United States also supply us with pitch pine lumber, horses, and mules, and food for same, hay and oilmeal, and pollard; our proximity to the United States will account for the preference for living animals thence, the risk on voyage being less.

I now come to the important item of water carriage or freight. Foreign America must always have the advantage over the United Kingdom, and even over the nearest British American Colonies, for not only are the rates lower, but the opportunities from the United States are more frequent and more convenient. The rate of freight from

BARBADOS.

the United States is often 9*d.* to 10*d.* per barrel, which is less than 7*s.* per ton measurement, and never over 10*s.*, whilst nothing comes from the United Kingdom at less than 15*s.* for rough goods, 25*s.* to 50*s.* per ton for finer, exclusive of a primage. Displacement, therefore, if it could be carried out, would mean the displacement of the foreign American trade.

Dealing in like manner with our exports, the freight hence on crystal and Muscovado sugar is from 10*s.* to 14*s.*, as against 25*s.* and 30*s.* respectively. These differences will account for the divergence of the sugar trade from the United Kingdom to the United States. It is not that the United States pays more for its sugar than the United Kingdom, but if the producers have two markets offering of equal value, and it takes about half the expense to send it to one of them, it is but natural to suppose they will favour the one with the lighter charges.

Another point is, could the United Kingdom take all our sugar? By far the larger proportion of sugar made in these Colonies has to pass through the refiner's hands before it is acceptable to the public taste. Are there refineries in the United Kingdom able to cope with the quantity that could be sent? It must be borne in mind that the same argument might be used as regards proximity of market for the United Kingdom and those countries producing beet sugar; if therefore the West Indies were to throw their refining sugar on the United Kingdom to compete with beet a congestion of the sugar trade in the United Kingdom might be produced attended with disastrous results to ourselves.

In conclusion, whilst most of the foodstuffs named come from the United States, those of a better description continue to be imported from the United Kingdom, there being a distinct preference. I allude to candles, hams, bacon, cheese, groceries, jams, &c., family biscuits, &c. The bulk of the butter coming from the United Kingdom is really of French and other foreign manufacture. All that can be said of it is that it is suitable to the wants of the majority of the population.

I have, &c.,
J. GARDINER AUSTIN, JUN.,
Chairman.

TRINIDAD.

TRINIDAD.

No. 10.

SIR F. NAPIER BROOME to MR. CHAMBERLAIN.

(Received March 5, 1896.)

SIR, Government House, February 19, 1896.

IN reply to your despatch of the 28th November 1895, calling for information respecting the trade of this Colony with the United Kingdom and Foreign Countries, I have the honour to enclose herewith, a report, with annexures, on the subject, dated the 17th instant, by the Collector of Customs (Mr. McCarthy), who has been readily and effectively assisted by the Trinidad Chamber of Commerce.

2. The patterns referred to in the report are being forwarded to the London Chamber of Commerce, as directed.

3. I trust and believe that the report and papers now sent will be found to be a clear and adequate reply to your despatch.

4. I will add a few words upon the very important subject of the selection, packing, and forwarding of goods for export from Great Britain to the Colonies. Speaking from my personal experience of many years in many Colonies, I am decidedly of opinion that the packing system and arrangements in Great Britain are too often of a nature to disgust the most patriotic customer, and to drive away trade. Breakages which could easily be prevented are very frequent, responsibility is declined therefor, and the colonial customer finds it better to deal with local firms, who probably import foreign goods.

5. Great negligence is also often shown in the selection and forwarding of goods by even high class suppliers. I could give instances of this which would hardly be believed.

6. I attribute a great part of the defects mentioned in the two preceding paragraphs, as well as other trade shortcomings I might mention, all of which have become more frequent and accentuated of late years, to the constant and now general substitution of

the company for the private firm. When, as is every day the case, a private firm turns itself into a company, an immethodic laxness and confusion seems often to creep into its conduct of business. The personal supervision of former times falls into decay, employés are ill-selected, the nepotism and patronage of a board of directors is exercised with injurious result, and there is a general deterioration from the previous high standard, particularly in dealings with distant customers. Details which used to receive the closest supervision are left to take care of themselves, and British trade and commerce suffer in consequence.

7. To devise a remedy for such a state of things is difficult indeed, but the opportunity, afforded by your despatch, of pressing upon all companies which manufacture and supply goods, the great necessity of a closer attention to the details of their business than is exercised by most of them, and of an endeavour to maintain the personal and interested supervision exercised by a good private firm, should not, I think, be lost. Neglect in these matters is, I believe, accountable for a good deal of the diversion of trade of which complaint is made.

I have, &c.,
F. NAPIER BROOME.

Enclosure in No. 10.

SIR, Custom House, Trinidad, February 17, 1896.

IN accordance with instructions, and with a view to obtaining the information required by the Secretary of State relative to foreign trade with the Colony, I placed myself in communication with the Chamber of Commerce, which body appointed a committee to investigate the subject. Annexe 4 is the report of the committee, and Annexe 5 a record of its proceedings. The latter is necessarily imperfect, professing to be only an abstract, but it conveys much valuable information, and shows how general is the feeling expressed in the report that in this Colony a serious displacement of British by foreign goods had occurred and was still going on.

2. It is to be regretted that no means exist of accurately estimating the extent of this displacement, the only statistics obtainable, which are given in Annexe 1, being unreliable, in consequence of differences in classification and of the fact that large quantities of foreign goods reach us through Great Britain and are entered as British. In no two of the three years specified were the tariff headings quite the same, and some of those now in use are exceedingly comprehensive. "Hardware" includes clocks, cutlery, implements of industry, and iron of all sorts; and 11 of the headings enumerated in the annexe to the Despatch of the Secretary of State are collected by us in one, viz.:—"Textiles, Wearing Apparel, and Haberdashery." Then a very large proportion of certain classes of goods which arrive from the United Kingdom and are officially described as British are of foreign origin. These are not merely goods in transit under foreign covers and with foreign invoices; they have lain for perhaps months in the warehouses of London or Glasgow merchants, and been repacked, and, except to experts, there is nothing to indicate their foreign character. Several of the leading merchants in Trinidad say, indeed, that it was through the operation of the Merchandise Marks Act that they first learned that such goods were not British.

3. In examining the reasons assigned for the preference given to foreign goods, one is struck by the fact that it is hardly ever due to superior quality. The greater cost of British goods is justified by their excellence, but, as a local merchant expressed it, they are as a rule "too good for the market." I have endeavoured, but fruitlessly, to obtain comparative prices, none of the merchants who supplied me with foreign patterns being able to show me British goods with which a comparison might be drawn. I believe it may be asserted that price is a factor only in so far as it affects suitability to the market, but in that respect it is an important one.

Under almost every heading in the annexed statistical return the United States and Germany, and to a less degree other foreign countries, supply the Colony, and the large part of Venezuela for which Trinidad is an *entrepôt*, with cheap articles, of perhaps inferior materials or workmanship, but which find a large and ready sale, and with which apparently Great Britain does not attempt to compete. For goods of high quality there are few purchasers here, the means or the tastes of the vast majority combining with climatic conditions to induce a preference for the cheap, light, and fanciful, and these peculiarities of the market seem to have been taken more careful note of by foreign than by British dealers. As illustrating this statement, I

may refer to the patterns of German cloths, Austrian shirts, and Italian hats, none of which, I am informed, resemble anything made in Great Britain. The foreign producer of dry goods also consults tropical tastes by enclosing his wares in highly decorative cartons, with a prodigal allowance of tissue-paper and ribbons, these packages being in striking contrast to the substantial businesslike articles employed in Great Britain.

In this market, where the transhipment trade is extensive, packing is an important point, and the inattention to it of British importers is commented upon strongly. Convenience in the size of packages is, it is said, more studied by foreigners, butter, cheese, cement being quoted as showing the persistency of British trade in adhering to traditionary methods. The foreign package, too, is generally neater, cases in point being "shelf goods" of the hardware class and American grease; and hardware and dry-goods dealers—the latter instancing rolls of German cloth—lay stress on the great advantage for purposes of show of the German and American methods of making up goods. General slovenliness is, indeed, alleged against the British packer. A case is mentioned of sewing-machines being forwarded in puncheons, and another of a set of harness enclosed in a case which would have held six, the vacant space, for which freight had to be paid, being filled with brown paper; and the large percentage of breakage arising from careless packing has materially contributed to the transfer of orders to foreign countries.

It may be briefly pointed out that in many cases the scale is turned in favour of America by the necessary difference in the cost of carriage.

Some merchants attach importance to the superiority of American catalogues, which are fuller, better illustrated, and more expensive than those sent out by British houses. The explanation is said to be in differences in the two systems of discount, the American being able to revise prices by a leaflet where the issue of a new catalogue would be necessary to the British dealer. I believe that this system is not quite unknown in the United Kingdom; still, the matter may be worth mention.

The low charges on the German Government railways, and the increased facilities for the shipment of goods at Continental ports, have in all likelihood stimulated foreign commerce; but it is a significant fact that while there has been an increase in the total importation of foreign goods, the quantity coming direct in foreign bottoms has sensibly diminished within, say, the last 10 years, and the greater part now reaches us through British ports and in British ships. This disproves the assertion of some of the local merchants that the Merchandise Marks Act has had an adverse effect on the British transit trade. But the assertion is on other grounds untenable, so far at least as Trinidad is concerned, as any marks which would interfere with the free passage of goods through the United Kingdom would render them liable to detention here; and, after giving particular attention to the matter in connexion with the Dutch and French steamers which trade regularly with Trinidad, I am able to testify to the virtually total absence of marks of even dubious legality.

I should consider the causes of preference for foreign goods to be, placing them in the order of their importance:—

(1.) Suitability to the market in—
  (*a.*) Cheapness, and
  (*b.*) Style and pattern;
(2.) Packing and making up; and
(3.) Finish, *i.e.*, better appearance for the price.

4. In supplying the reasons for preference (Annex 2), I have thought it advisable in the interests of clearness to omit certain details, such as price, placing them instead on the labels attached to the patterns, each of which is thus made to give the fullest information.

A list* of the patterns forwarded will be found in Annex 3.

I beg in conclusion to gratefully acknowledge the ready and valuable aid afforded by the Chamber of Commerce as well as by individual merchants.

I am, &c.

R. H. McCARTHY,
Collector of Customs.

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* Not printed.

Annexe 1.

TRINIDAD.—RETURN of IMPORTS into the Colony, giving Value and Per-centage of Foreign Imports for the Years 1884, 1889, 1894.

List No.	Commodity.	1884. Total Value of Imports.	1884. Value of Imports from Foreign Countries.		1884. Per-centage of Foreign Imports.	1889. Total Value of Imports.	1889. Value of Imports from Foreign Countries.		1889. Per-centage of Foreign Imports.	1894. Total Value of Imports.	1894. Value of Imports from Foreign Countries.		1894. Per-centage of Foreign Imports.	Observations.
		£		£		£		£		£		£		
2	Animals, horses	3,785	United States Venezuela	1,360 1,420	73·4	9,976	United States Venezuela	2,040 2,991	50·4	8,595	United States Venezuela	3,953 1,261	60·6	
3	Apparel and slops	—	- - -	—	—	—	- - -	—	—	—	- - -	—	—	Included in textile. Estimate of Foreign imports 75 per cent. about equally divided between men's and women's.
4	Arms and ammunition.	3,264	United States France Germany Holland	1,400 160 86 50	51·3	1,953	United States France Germany Holland Belgium Venezuela	1,015 88 30 55 37 48	66·3	1,389	United States France Germany Holland Belgium Venezuela	505 71 34 40 15 125	56·9	
6	Beer and ale	39,136	United States France Germany Holland	550 48 3,755 57	11·2	27,859	United States Germany Denmark	195 4,044 24	15·5	43,179	United States Germany Norway Denmark Holland	323 5,505 20 25 8	13·6	
7	Biscuits and bread	12,165	United States	10,754	88·4	16,901	United States	10,590	62·6	20,996	United States	18,960	90·3	
10	Butter	37,881	United States France Germany Denmark	4,441 21,627 42 426	70·1	23,359	United States France Germany Denmark F. W. Indies	3,233 14,293 46 43 112	75·8	22,566	United States France Germany Denmark Holland	1,207 15,114 59 470 245	75·7	
11	Candles	9,474	France Germany	666 17	7·1	—	- - -	—	—	—	- - -	—	—	The importations from foreign countries in 1889 and 1894, were under 5 per cent. of the total importations.
18	Carriages and waggons :													
	Railway		All British.				All British.				All British.			
	Other carriages, four wheels.	1,670	United States	900	—	700	United States	560	—	881	United States	586	—	
	Other carriages, two wheels.	30	- - -	—		130	United States	40		146	United States	50		

List No.	Commodity.	1884. Total Value of Imports.	1884. Value of Imports from Foreign Countries.		1884. Percentage of Foreign Imports.	1889. Total Value of Imports.	1889. Value of Imports from Foreign Countries.		1889. Percentage of Foreign Imports.	1894. Total Value of Imports.	1894. Value of Imports from Foreign Countries.		1894. Percentage of Foreign Imports.	Observations.
		£		£		£		£		£		£		
15	Cheese	6,336	United States	3,793	82·4	5,487	United State	3,346	84·6	7,207	United States	4,700	—	
			France	563			France	534			France	101		
			Germany	25			Holland	123			Holland	218		
			Holland	58			Venezuela	660			Venezuela	1,607		
			Venezuela	784										
18	Clocks and watches	—	- - -	—	—	—	- -	—	—	—	- - -	—	—	Included in hardware. Higher qualities, British. Cheaper, American and Swiss.
20	Cordage and twine	—	- - -	—	—	—	- - -	—	—	—	- - -	—	—	Included in Other Manufactured Articles. Sisal chiefly from United States and Germany. Some twine from Spain, practically remainder from Great Britain.
21	Corn of all kinds	27,383	United States	6,763	44·3	27,695	United States	11,464	47·7	22,962	United States	11,545	57·2	
			France	154			Spain	87			Germany	71		
			Germany	3,330			Germany	1,699			Venezuela	154		
			Holland	1,333			Holland	24						
			Venezuela	555			Venezuela	14						
	(*b*) Wheat: flour	135,327	United States	132,739	97·1	115,124	United States	110,757	96·2	183,113	United States	180,980	98·8	
23	Cotton goods	—	- - -	—	—	—	- - -	—	—	—	- - -	—	—	Included in Textiles. Piece goods mainly British. Stockings and socks largely German. Subheading *d.*, British; and *e.*, *f.*, and *g.*, largely Foreign.
24	Earthen and china ware.	14,680	United States	1,219	55·2	8,793	United States	308	39·8	12,692	United States	273	47·4	
			France	1,786			France	478			France	1,155		
			Germany	4,890			Germany	2,567			Germany	3,926		
			Holland	68			Holland	23			Holland	260		
			Austria	127			F. W. Indies	62			Austria	191		
			Spain	26			Venezuela	68			Belgium	152		
											Venezuela	67		
26	Furniture	12,297	United States	4,622	58·9	6,860	United States	2,112	39·5	12,065	United States	3,681	45·4	
			France	796			France	165			France	201		
			Germany	1,346			Germany	396			Germany	1,233		
			Austria	58			Dutch W. Indies	22			Austria	166		
			F. W. Indies	120			Venezuela	20			Holland	79		
			Venezuela	311							Belgium	94		
											Venezuela	78		

27	Glass: (*d.*) Of other sorts	—	- - -	—	—	—	- - -	—	—	—	- - -	—	—	British and Belgian, the latter country sending a considerable quantity of cheap window glass.
29	Haberdashery and millinery.	—	- - -	—	—	—	- - -	—	—	—	- - -	—	—	Included in Textiles, mainly British.
30	Hardware -	84,271	United States -	10,261	18·8	51,621	United States -	5,421	14·8	85,883	United States -	12,945	19·4	
			France - -	4,434			France - -	1,127			France - -	1,898		
			Germany - -	1,134			Germany - -	1,028			Germany -	1,572		
			Holland -	73			Holland -	72			Holland - -	415		
			Austria - -	12							Belgium - -	321		
											Austria - -	55		
	Cutlery - -	—	- - -	—	—	—	- - -	—	—	—	- - -	—	—	Not separate in returns; almost wholly British.
31	Hats: (*a*) Straw -	—	- - -	—	—	—	- - -	—	—	—	- - -	—	—	British chiefly, but some fancy straws come from Germany.
	(*b*) Other -	—	- - -	—	—	—	- - -	—	—	—	- - -	—	—	British chiefly, except of soft beaver and wool, of which many come from Germany, Spain, and Italy.
34	Leather: (*b*) Boots and shoes (*c*) Other sorts. (*d*) Saddlery and harness.	46,088	United States -	1,011	13·0	37,474	United States -	1,490	—	6,724	United States -	446	—	Previous to 1894, boots and shoes were included in the heading, Leather, manufactured.
			France - -	4,610			France - -	388			France - -	210		
			Germany -	350			Germany - -	459			Germany -	80		
			Spain - -	80			Austria -	2,811			Holland - -	45		
	(*b*) Boots and shoes	—	- - -	—	—	—	- - -	—	—	39,818	United States -	2,089	—	
											France - -	1,083		
											Germany -	2,411		
											Austria - -	1,540		
39	Medicines - -	6,870	United States -	1,131	19·1	9,986	United States -	2,049	34·7	10,048	United States -	2,421	35·1	
			France - -	77			France - -	447			France - -	510		
			Germany - -	10			Germany -	861			Germany -	93		
											Holland -	418		
											Venezuela -	95		
40	Metals - -	—	- - -	—	—	—	- - -	—	—	—	- - -	—	—	Included in Hardware. Practically all from Great Britain except wrought iron for building which, though consigned from Great Britain, is usually Belgian.
41	Musical instruments -	—	- - -	—	—	—	- - -	—	—	—	- - -	—	—	Included in Furniture and Other Manufactured Articles. Pianos chiefly from Germany. Importations of other kinds of instruments, insignificant.

List No.	Commodity.	1884. Total Value of Imports.	1884. Value of Imports from Foreign Countries.		1884. Percentage of Foreign Imports.	1889. Total Value of Imports.	1889. Value of Imports from Foreign Countries.		1889. Percentage of Foreign Imports.	1894. Total Value of Imports.	1894. Value of Imports from Foreign Countries.		1894. Percentage of Foreign Imports.	Observations.
		£		£		£		£		£		£		
48	Plate and plated ware	—	- - -	—	—	—	- - -	—	—	—	- - -	—	—	Included in Hardware. Estimate about half each from United States and Great Britain.
54	Silk manufactures -	—	- - -	—	—	—	- - -	—	—	—	- - -	—	—	Included in Textiles. Piece goods largely from Germany and France through Great Britain. Ribbons mainly German and French. Lace net almost wholly British.
57	Spirits - -	14,657	United States -	470	43·2	13,046	United States -	287	35·8	20,384	United States -	1,132	43·9	French imports represent brandy. German plain spirit and Dutch geneva. United States, Canadian rye whisky.
			France - -	5,074			France - -	2,900			France - -	4,293		
			Germany -	549			Germany -	644			Germany -	734		
			Holland -	221			Holland -	861			Holland - -	2,635		
			Denmark -	18							Spain - -	157		
59	Stones and slates -	—	- - -	—	—	—	- - -	—	—	—	- - -	—	—	Included in Other Manufactured Articles. Grind and mill stones from Great Britain. Slates from United States.
61	Sugar, refined -	14,336	United States -	12,121	88·5	5,817	United States -	5,543	96·5	4,661	United States -	4,193	93·3	
			France - -	92			France - -	54			Germany -	17		
			Germany -	460			Venezuela -	17			Holland - -	100		
			Holland -	19							Venezuela -	44		
63	Umbrellas and parasols.	—	- -	—	—	—	- - -	—	—	—	- - -	—	—	Included in Textiles; largely German and French, especially parasols.
63A	Wine - -	40,302	France - -	28,104	93·0	38,290	United States -	25	90·1	33,631	United States -	48	94·5	
			Germany -	290			France - -	20,572			France - -	14,635		
			Spain - -	18,950			Germany -	447			Germany -	199		
			Portugal -	176			Spain - -	13,182			Spain - -	16,216		
							Portugal -	214			Portugal -	345		
							South America -	39			Holland - -	228		
							F. W. Indies -	63			F. W. Indies -	133		
64	Wood and timber -	5,355	United States -	4,465	83·3	5,200	United States -	3,760	72·3	936	United States -	936	—	

67	Woollen manufactures :—	—	- - -	—	—	—	- - -	—	—	—	- - -	—	—	Included in Textiles.
	(*a*) Woollen tissues	—	- - -	—	—	—	- - -	—	—	—	- - -	—	—	Estimate about half German, half-British.
	(*b*) Worsted coatings.	—	- - -	—	—	—	- - -	—	—	—	- - -	—	—	Estimate about half German and French, and half British.
	(*c*) & (*d*) Flannels & blankets.	—	- - -	—	—	—	- - -	—	—	—	- - -	—	—	Estimate chiefly English.
	(*e*) Worsted stuffs	—	- - -	—	—	—	- - -	—	—	—	- - -	—	—	Estimate about half German and French, and half British.
	(*f*) Carpets -	—	- - -	—	—	—	- - -	—	—	—	- - -	—	—	Chiefly British, but increased importation from United States.
	Textiles (wearing apparel and hab:rdashery.)	276,927	United States -	5,264	7·1	219,470	United States -	2,925	6·9	276,581	United States -	3,822	7·8	
			France - -	12,816			France - -	8,813			France - -	10,884		
			Germany - -	1,552			Germany - -	2,932			Germany - -	5,519		
			Spain - -	107			Portugal - -	14			Spain - -	97		
			Portugal - -	27			F. W. Indies -	161			Portugal - -	12		
			Norway - -	33			Belgium. - -	58			F. W. Indies -	149		
							Austria - -	149			China - -	52		
							Venezuela -	196			Austria - -	372		
											Italy - -	318		
											Holland - -	620		
	Other manufactured and unmanufactured articles not enumerated.	189,853	United States -	16,466	36·2	98,327	United States -	11,065	26·1	180,127	United States -	14,796	31·0	
			France - -	15,168			France - -	8,320			France - -	8,407		
			Germany - -	6,055			Germany - -	3,269			Germany - -	4,228		
			Holland - -	176			Holland - -	124			Holland - -	1,121		
			Austria - -	127			Spain - -	514			Austria - -	243		
			Spain - -	367			Portugal - -	228			Spain - -	427		
			Portugal - -	1,142			F. W. Indies -	299			Portugal - -	269		
			F. W. Indies -	4,895			Venezuela -	1,899			F. W. Indies -	3,367		
			Venezuela -	6,247			Dutch W. Indies	111			Venezuela -	7,150		
											Switzerland -	24		
											Belgium - -	426		

Annexe 2.

REASONS FOR PREFERENCE GIVEN TO FOREIGN PRODUCTIONS.

Trinidad, February 17, 1896.

2. ANIMALS: HORSES.—Canada and the United States practically divide between them the trade in horses, their animals being cheaper than British, owing, to some extent, to the difference in freight.

The importation from Venezuela mainly consists of ponies, whose activity renders them valuable in the less developed parts of the colony.

3. APPAREL AND SLOPS.—Estimated importation from Germany and France, 75 per cent. of the whole. British-made clothing is alleged to be too heavy for the climate, and too expensive, as well as not showy enough for the market. The "moleskin" trowsers forwarded herewith are considered wonderfully good for the price, being landed here at about 1*s.* 8*d.* per pair.

4. ARMS AND AMMUNITION.—Besides Great Britain, Belgium (whose goods come through the United Kingdom) and the United States are the only importers of consequence. Cheap guns of very inferior quality arrive from Belgium, and the Americans have a virtual monopoly of the trade in revolvers. Revolver cartridges come from America, and a large quantity of percussion caps is imported from America and Germany. In every case, except as regards revolvers, the preference is solely due to price; and all of the best goods under this heading are British.

6. BEER AND ALE.—Germany is the only serious rival of Great Britain, the lightness of her beers rendering them suitable to this climate.

7. BISCUIT AND BREAD.—Canada and the United States virtually divide this trade. It is suggested that Canada's share would be larger if her exporters paid more attention to this market. A considerable quantity of fancy biscuits comes from Great Britain.

10. BUTTER.—A large quantity of oleo-margarine is imported from the United States. Cooking and other cheap butters come from the United States and Brittany. The bulk of the table butters come from Denmark through the United Kingdom. A certain quantity, though much less than was formerly the case, of British and Irish produce, is imported. Foreign butters are said to be cheaper, of more even quality, and to be made up in more convenient packages.

13. CARRIAGES AND WAGGONS.—The railway belongs to the Government, and all its plant is imported from Great Britain. Respecting other carriages, there is no comparison in quality between the British and American, and many authorities assert that the expensive British vehicle is the cheaper in the end. But, however that may be, the American buggy is the most popular carriage here, owing to its cheapness and lightness. The parts and fittings generally of carriages also come in the main from America, the British articles being objected to as too heavy and costly.

15. CHEESE.—American cheese has almost a monopoly of the market, being very cheap and made up in a convenient size. Small quantities of high-priced cheese arrive from Great Britain and other European countries. The consumption of Venezuelan cheese is confined to inhabitants of that country resident here.

18. CLOCKS AND WATCHES.—The features of this trade are the same as in Great Britain, the better (and more expensive) articles being British, cheap watches coming from America and Switzerland, and cheap clocks from America.

20. CORDAGE AND TWINE.—This trade has been and practically remains British, except as regards sisal, which is usually American or German, owing, it is alleged, to cheapness. The patterns forwarded represent goods which have a considerable sale here. The twine is said to be made up in a way that is liked; and the slippers, which are landed here for 4½*d.* per pair, are very popular.

21. CORN OF ALL KINDS:

(*a.*) *Wheat;* (*b.*) *Wheat-flour.*—Chiefly from the United States.

(*c.*) *Other kinds.*—Oats almost wholly from Canada. Beyond these the importations are very trifling.

23. COTTON MANUFACTURES:

(*a.*) *Piece Goods.*—The trade in piece goods is nearly wholly British, and the exceptions are illustrated by the patterns sent herewith. Ducks come altogether from America, which has long had a world-wide reputation for these goods, and very many kinds cannot be obtained elsewhere. The drills forwarded are preferred for their

patterns, and the fact that for the price they are excellent. The designs of the counterpanes, the nice appearance of the materials, and their cheapness explain the preference for them.

(*b.*) *Stockings and Socks.*—The reasons for preference may be summarised in the statement that for the prices the articles are very good, and of attractive appearance.

(*e.*) *Hosiery.*—The Spanish undershirts represent a class of goods which is largely sold here, being suited to the climate and very cheap; but it is unobtainable in Great Britain. That from France is of excellent quality and well finished, though comparatively cheap. For their price the braces are extremely good; and the same remark applies to the blanket, which is suited to this climate and can be landed here for 2*s.* per pair.

(*f.*) *Shirts.*—The patterns, four shirts from Austria, represent goods in which an immense trade is done. With one exception they are of inferior quality, but they are got up in a style which suits the market, and are packed in fanciful cartons, with much liberality in the direction of tissue paper and ribbons.

(*g.*) *Pants.*—For the low price, about 9*s.* per dozen pairs, the make and finish of this article, one pair drawers from France, are considered admirable.

24. EARTHEN AND CHINA-WARE.—The superiority of British ware in general is admitted here, it being described indeed as "too good for the market." Probably two-thirds of the trade is foreign, and the reasons assigned are the greater cheapness and lightness of the foreign ware, the more convenient sized packages in which it is put up, which facilitates transhipment to South America, and the greater care with which it is packed.

26. FURNITURE.—Insects and the moisture of the climate quickly injure furniture here, and costly articles are, therefore, eschewed. And the goods in general use in Great Britain are not only too expensive but are unsuitable by their massiveness for a tropical climate. Bentwood comes in large quantities from Austria, and from America is received a great deal of light furniture. However, all of the best furniture is British.

28. GREASE, TALLOWS, AND ANIMAL FAT.—This is mainly American. That country is said to send the best, and an important point seems to be that the American goods are made up in neat packages, which also can when empty be used as vessels.

30. HARDWARE.—(*e.*) *Hollow-ware.*—The marvellous cheapness of the spoons is their sole recommendation. The locks and latches, both German and American, are very cheap, and some of them are at the same time notable for the inferiority of their design. Speaking generally, the preference for these goods is due to the ease with which they can be fitted by unskilled labour, and adapted to different purposes, to the neatness with which they are packed with all their parts, and to a finish which seems wholly wanting in the case of cheap British articles. The parcel of British, American, and German hardware forwarded in original wrappings is instructive. All have been in the shop of one firm for about the same period, the smallest of the British packages being kept in a glass case. The foreign goods in their neat labelled cartons, could be exhibited with rapidity and ease, and goods and packages are uninjured by time; but the British articles could not be inspected without a loss of time and temper to the vendor, and the creation of prejudice to the purchaser. The wrappings have had to be again and again supplemented, and they are now unfit for use, while the contents have deteriorated in appearance.

Lamps of the description forwarded are preferred here, because though slightly dearer than British, they are far better, are more convenient in design, and can be had in greater variety of pattern.

30. CUTLERY.—Except as regards cheap goods of this class, Great Britain has a monopoly of the market. Under the head of hardware generally it may be observed that in the case of the heavier goods America has an advantage in lower freights; that kitchen utensils, except enamelled articles, which Germany sends, come from Great Britain; that America seems to be quite unopposed in respect of shelf brackets and light castings generally; and that American and German exporters show more readiness than their British rivals to meet the wishes of purchasers as regards packing.

31. HATS.—Great Britain has the most remunerative portion of this trade, but the patterns sent represent large importations. Fancy straws are in demand here, and there is a vast sale for the Italian articles, which are generally used by the populace of Trinidad, and of the adjacent mainland, being cheap, comfortable, and effective.

TRINIDAD.

32. IMPLEMENTS AND TOOLS OF INDUSTRY.—The bulk of this trade is British, with certain exceptions. America sends the cheaper shovels, which are excellent for their price; and her hatchets have ousted the British product, though they in their turn are being beaten by Swedish goods. The tool handles forwarded cannot, it is said, be rivalled by Great Britain, for quality combined with cheapness, owing to the use in that country of too expensive woods.

34. LEATHER, MANUFACTURED:

(*b.*) *Boots and shoes.*—"Style," "make," and "finish," are the terms used in explaining the large importation of foreign-made boots and shoes, and they are probably explicable by reference to the taste of the purchasing public here, which, in this direction as in others, does not appreciate the plain and substantial. The statement may be quoted that the West Indian foot is of a different model to the English, and that British exporters have not hitherto taken the fact into account.

(*c.*) *Of other sorts.*—These represent a cheap and showy class of articles, for which there is a large sale, and which come almost wholly from Austria, Germany, and France.

39. MEDICINES.—Drugs come mainly from Great Britain, but there is a large and increasing importation of proprietary medicines from America, whose success may probably be attributed to bold advertisement.

40. METALS.—All come from Great Britain, but much of the ironwork for building purposes, though purchased in the United Kingdom, is of Belgian origin.

41. MUSICAL INSTRUMENTS.—Virtually confined to pianos, which generally come from Germany. It is said that German pianos are better for the price and more suitable to a tropical climate.

48. PLATE AND PLATED WARE.—Almost equally divided between Great Britain and the United States. The cheaper American kinds are alleged to be the more tasteful in design.

54. SILK MANUFACTURES.—The bulk of silk goods comes through Great Britain, but much of this quantity is of German or French origin. No reason can be assigned.

59. STONES AND SLATES.—Most of the slate comes from the United States, the price, owing no doubt largely to lower freight, being much cheaper than that of Welsh. The quality, however, is very inferior, and there is a disposition to leave the American for the British market.

63. UMBRELLAS AND PARASOLS.—Almost equally divided between Great Britain and foreign countries. When foreign goods are preferred it is because the handles are more tasteful.

64. WOOD MANUFACTURES.—These come solely from Canada and the United States. The preponderance of American goods is attributed in a great degree to more perfect machinery.

67. WOOLLEN AND WORSTED MANUFACTURES.—It is said that, speaking generally, the mixed wools imported are of British manufacture, but that Germany has a large share of the "all-wool" trade, her prices being lower or the patterns more attractive.

(*f.*) *Carpets.*—This trade is mainly British, but American goods are beginning to find a market here, owing to their great cheapness.

(*g.*) *Of all other sorts.*—Here, again, as in so many of the preceding cases, "quality, having regard to the price," is the reason assigned for preference.

Annexe 4.

TRADE WITH THE UNITED KINGDOM.

REPORT of the Committee of the Chamber of Commerce upon the question of the Mutual Trade of the United Kingdom and the Colonies, submitted in a Despatch addressed to the Secretary of State for the Colonies to Colonial Governors, and forwarded by direction of his Excellency Sir F. Napier Broome for the consideration of the Chamber.

1. Your Committee are deeply impressed with the important bearing of Mr. Chamberlain's inquiries upon the present position and future prospects of mutual trade between Great Britain and her Colonies, and recognise with a lively sense of satisfaction the practical interest evinced by the right honourable gentleman alike in all that

concerns the material welfare of the small as well as the large dependencies of the Crown coming within the scope of the duties of his responsible office.

2. In order to obtain the most reliable and authentic information for the purposes of this report it was thought desirable to request the assistance and presence at the meetings of the committee of merchants (members of the Chamber and others) connected with the leading importing and exporting firms in Port-of-Spain, and your Committee have to thank those gentlemen who attended for their prompt and valuable aid. A brief abstract of the proceedings of the meetings thus held will be found in the appendix hereto,* and will be referred to in this report by marginal numbers corresponding to those in the appendix.

3. The information thus gathered points in the most significant manner to the gradual displacement in this market of British by foreign goods to an extent at the present time which will come as a surprise to many, and would hardly have been thought possible had it not been stated on such ample and reliable authority.

4. In all the more important articles of manufacture in which Great Britain once commanded a monopoly, the same falling off is observed, and the regrettable fact remains that whilst the trade of the Colony has been progressing in the most satisfactory manner, its greater volume is being slowly but surely diverted to foreign sources.

5. Foreign made apparel, arms, beer, cordage, haberdashery, earthen and china-ware, hosiery, stockings, and socks, cottons, hardware, hats, ploughs, boots and shoes, saddlery, wrought iron, pianos, paper (except writing), plated ware, jewellery, ribbons, woollens, and carpets, are slowly but surely ousting similar goods which were once obtained almost exclusively from Great Britain, and in the manufacture of which she was formerly *facile princeps*.

6. In one item of commerce alone, viz., slates it would appear from the evidence before your Committee that the trade diverted from the United Kingdom to the United States, was likely to return, but even in this solitary instance the probability of successful German competition is hinted at.

7. As to the reasons which have induced importers to prefer the foreign article to similar goods of British manufacture your committee are left in no doubt. They are

(*a.*) Price—though perhaps not in all cases superior intrinsic value.
(*b.*) Better quality and finish—the latter more than the former.
(*c.*) A style and pattern more suitable to the market.
(*d.*) Neater and better packing.
(*e.*) Greater adaptability to climatic conditions.

8. It should be specially noted that a considerable proportion of the imports of the colony officially returned as British are the product or manufacture of foreign countries, *e.g.*, arms, earthen and china-ware, furniture, cutlery, hats, salt, silk, umbrellas, stockings, matches, &c., &c.

9. Your Committee are not inclined to think that better terms of credit or financial facilities are offered by foreign than by British exporters, or that such influences have to any material extent diverted trade from the United Kingdom.

10. But cost of transport and cheap freight over the government railways in Germany are undoubted factors in the development of the export business of that empire.

11. Subsidies to shipping or on the export of foreign manufactures other than sugar coming to or imported into Trinidad are not, so far as your Committee are aware, granted to any appreciable extent.

12. The facilities offered for shipments from the continent of Europe are much in advance of those obtaining a few years ago, and have tended materially towards the extension of foreign trade, especially with Germany.

13. It is a noticeable fact that whilst foreign manufacturers, by adapting themselves more to the requirements of colonial markets, have successfully competed in the sale of articles which formerly were imported exclusively from the United Kingdom, the British manufacturer has never, so far as this Colony is concerned, succeeded in displacing or, apparently, made any serious effort to displace, particular specialities of goods originally introduced from abroad. For example, the light American buggy is, and has been for many years, the favourite vehicle for purposes of both business and pleasure throughout the West Indies. There would appear to be no good reason why similar carriages should not be made in the United Kingdom, but, up to the present date, no British manufacturer has thought it worth while to construct them.

14. Facility of communication with the United States, and trade connexions extending over very nearly a century, render it extremely unlikely that the trade in breadstuffs and provisions with that country will ever suffer serious interruption. Of late

* Not printed.

TRINIDAD.

years the government of Canada have made most laudable efforts by the establishment of commercial agencies throughout the islands, and by other means, to obtain a share of that trade, for which the natural resources of the Dominion seems so eminently adapted. But, unfortunately, Canadian exporters have shown the same disinclination or want of capacity to adapt themselves to the special requirements—notably in the case of the packing of goods—of these tropical markets as has marked the British manufacturer, and with a similar result. Attempts to make reciprocal arrangements whereby the products of Canada and the British West Indies would be received in either country on favoured terms as to duty, &c., have fallen through, but even without such adventitious conditions it is certain that trade with Canada is capable of considerable extension.

The want of direct cable communication with the United Kingdom and Canada at reasonable rates is severely felt throughout the West Indies, and various representations on the subject have already been addressed to Her Majesty's Government. The present cost of telegraphing to London, *viâ* the United States, is 10/5½ per word, an almost prohibitive rate in respect of trade transactions other than those of a large wholesale character.

15. Your Committee find that the general opinion is that the Merchandise Marks Act has had a very contrary effect to that which was intended or expected. Far from assisting British trade it has opened the eyes of importers as to the true origin of goods imported, and these are now, in many instances, ordered direct, instead of, as heretofore, through a British agent. To this may be attributed the fact of so many ocean steamers now making Hamburg and other Continental ports regular places of call.

16. The carefully compiled trade reports which foreign consuls are required to forward regularly have no doubt proved of great value to the manufacturers of the countries they represent, who have availed themselves readily of the information always at hand in regard to the class and quality of goods required.

17. Touching the principal item of export of this colony—sugar—your Committee do not think it necessary at present to add anything to the statements which have recently been made by petition and otherwise beyond remarking that so long as the iniquitous system of foreign bounties is permitted to continue, so long will the trade of the colony with the United Kingdom, both export and import, be unduly hampered and rendered more difficult of return to its former and more legitimate channel.

18. Your Committee take this opportunity of acknowledging the valuable assistance they have received in the consideration of this report from Mr. R. H. McCarthy, Collector of Customs, who was good enough to attend three of their meetings.

WM. HOWATSON,
President.
EDGAR TRIPP,
Hon. Secretary.

1st February 1896.

BRITISH GUIANA.

BRITISH GUIANA.

No. 11.

ACTING GOVERNOR BOYLE to MR. CHAMBERLAIN.
(Received February 6, 1896.)

Government House, Georgetown, Demerara,
January 22, 1896.

SIR,

I HAVE the honour to acknowledge the receipt of your despatch of the 28th November last, in which you state that you are impressed with the extreme importance of securing as large a share as possible of the mutual trade of the United Kingdom and the Colonies for British producers and manufacturers, whether located in the Colonies or in the United Kingdom; and inviting the assistance of this government in obtaining a return showing the extent to which in British Guiana foreign imports of any kind have displaced, or are displacing, similar British goods, and the cause of such displacement.

2. It will be observed from the letter of the Comptroller of Customs transmitted herewith, and from the return which accompanies it, that the customs statistics do not

show a displacement of any British manufactures excepting machinery. A statement is also annexed dealing with the importation through Great Britain of earthenware and glass ware of foreign manufacture.

3. I have caused the Chamber of Commerce of this city, the Royal Agricultural and Commercial Society, and the Planters' Association to be approached with a view of obtaining from them fuller particulars with regard to the reasons which may have, in the case where the return shows there has been a displacement, induced the colonial importer to prefer a foreign article to similar goods of British manufacture, and I trust that I shall be able to communicate to you the results of such inquiry, at an early date.

4. I am also, in anticipation of the receipt of the further despatch foreshadowed by you, taking steps to obtain the information with regard to products of the Colony which might advantageously be exported to the United Kingdom or other parts of the British Empire.

I have, &c.,
CAVENDISH BOYLE.

Enclosure in No. 11.

Custom House, Georgetown,
January 11, 1896.

Sir,

In compliance with the instructions contained in your letter of the 24th ultimo, I have the honour to submit herewith, in duplicate, a statement drawn up in terms of Mr. Secretary Chamberlain's Despatch of the 28th November last.

2. This statement has been prepared under my supervision, by Mr. G. W. Armstrong, the senior officer in charge of the customs statistics, who is well qualified for such a service, having himself been for some years engaged in commercial pursuits in this Colony before he joined the customs department.

3. Having carefully examined the statistics of this department for the period covered by the Secretary of State's despatch, Mr. Armstrong finds that they do not show a displacement of any British manufactures, excepting machinery, of which the details are given in the accompanying statement.

4. As regards goods of foreign manufacture which pass through Great Britain, and are included in the statistics of this department as British, a statement is submitted with respect to earthenware and glassware. There is good reason to believe that other foreign goods are so imported, but their value is small, and no certain information can be given about them.

It may be worthy of mention as illustrating the manner in which goods made in Germany are distributed throughout the British Empire, that a case occurred within recent years of the importation from Calcutta, by an East Indian trader, of glass beads and ornaments made in Germany, which had been sent to Calcutta from Germany in the first instance.

5. The return of products of the Colony which might advantageously be exported to the United Kingdom, as regards which the Secretary of State contemplates the preparation of a further despatch, could best be compiled by the Government botanist, who possesses exact and special knowledge of such matters. Meanwhile, I append an extract from the note by Sir Robert Schomburgk,* upon dyes, balsams, and gums in Guiana.

I have, &c.,
N. Darnell Davis,
Comptroller of Customs.

The Hon. the Government Secretary.

No.	Commodity.	Year.	Total Value of Importations.	Value of Importations from Foreign Countries.	
			£		£
37	Machinery of all kinds for steam power.	1884	182,596	United States - -	51
		1889	138,503	United States - -	859
				Other Foreign Countries -	322
		1894	71,787	United States - -	5,933
				Holland - - -	2,273
				Other Foreign Countries -	43

* Not printed.

BRITISH GUIANA.

The small amount, in value, of machinery imported in 1889, other than from the United Kingdom, was for wood working purposes and other minor industries.

The sugar industry being on the decline, and prices obtained for that commodity being less favourable, the machinery imported in 1894 was principally for repairs; no entirely new plant being introduced into the Colony for the manufacture of sugar.

The increase in value of machinery imported from foreign countries is due principally to mining machinery and apparatus being introduced on the recommendation of mining experts, and of such description as had been used by them in other mining countries, such as Australia, California, and South Africa. Some machinery for electric lighting purposes have been imported from the United States.

1884 to 1894.

24. EARTHENWARE, INCLUDING MANUFACTURES OF CLAY.—During the period of from 1884 to 1894, covering ten years, there has been no change observable in relation to the importations of this commodity from the United Kingdom; but it is well to mention that a proportion of about 50 per cent., although imported from the United Kingdom, is of foreign manufacture. The exact quantity of British manufactured earthenware cannot be ascertained there being no trade mark, as a rule, on the British or on the foreign manufactured articles.

This item of foreign manufacture is mostly of a fancy or ornamental kind. It suits the crude idea of the peasant population; and, being far cheaper than the British manufactured articles, also suits their buying power.

27. GLASS.—The same remarks in their entirety, as upon No. 24, hold good as to this commodity.

The statistics of the customs department are not kept so as to enter into minute details.

GEO. WM. ARMSTRONG,
Customs Officer.
N. DARNELL DAVIS,
Comptroller of Customs.

January 10, 1896.

No. 11 (A).

ACTING GOVERNOR BOYLE to MR. CHAMBERLAIN.
(Received March 5, 1896.)

Government House, Georgetown, Demerara,
February 14, 1896.

SIR,

IN continuation of my despatch of the 22nd ultimo, and with special reference to the third paragraph thereof, I have now the honour to transmit herewith, for your information, a copy of a letter which has been received from the Secretary of the Chamber of Commerce in Georgetown, giving fuller particulars as to the reasons which may have, so far as this Colony is concerned, induced colonial importers to prefer a foreign article to similar goods of British manufacture in the case where the return forwarded to you in my previous despatch disclosed a displacement of British goods.

I have, &c.,
CAVENDISH BOYLE.

P.S.—I transmit also a copy of a letter on the same subject from the Planters' Association, which has been received since I wrote the above despatch.

C.B.

Enclosure 1 in No. 11 (a).

SECRETARY, Chamber of Commerce, Georgetown, to GOVERNMENT SECRETARY.

SIR,

February 1, 1896.

I HAVE the honour to acknowledge receipt of your two letters, dated 14th and 28th January, which were considered at a meeting of the council of the Chamber

of Commerce on Thursday, and in reply I am instructed to say that the imports of machinery from the United States are principally in connexion with the electric light installation contract, and to a smaller extent mining machinery from English mining engineers with a manufactory in the United States; the machinery from Holland is almost entirely confined to Kroog's filter-presses for cane juice, from Sangerhausen, which are more suitable and less costly than others, and used to be imported viâ England prior to the running of the Dutch mail steamers.

The great falling off in imports of machinery from the United Kingdom may be accounted for by the severe depression in the sugar cane industry, and indicates the lack of faith on the part of capitalists interested in the manufacture of sugar, caused entirely through the foreign bounty system.

With regard to earthenware and glass the council is of opinion that the importers' English agents have found it cheaper to buy from foreign manufacturers than from their own. This cause of great cheapness in foreign countries can be best ascertained in England.

The Chamber of Commerce is impressed with the great importance of the Secretary of State's despatch (which is returned herewith as desired by you) and, in reply to your letter of the 14th instant, I am instructed to express every readiness to give any further special information not obtainable in the Government Departments, which it is in the power of the Chamber of Commerce to obtain for you.

I have, &c.,
G. Wyatt,
Secretary.

Enclosure 2 in No. 11 (A).

Secretary, Planters' Association, to the Government Secretary.

Sir, Georgetown, February 15, 1896.

I have the honour to own receipt of your communication, dated 28th January, with reference to goods from foreign countries displacing similar British goods, and the causes of such displacement.

We notice that, according to the customs statistics, machinery is the only British manufacture which shows a displacement within the limits of Mr. Chamberlain's despatch. We would point out that this is mainly accounted for by the importation of mining and electric light machinery from the United States of America; and the importation of filter presses of a special type is the one article representing machinery from Holland. These latter, though imported from Holland, are of German manufacture.

We are quite aware that a large portion of the cheaper kinds of earthenware and glass imported comes originally from the Continent, cheapness being the reason for this.

I have. &c.,
A. Summerson,
Secretary.

GOLD COAST.

No. 12.

Acting-Governor HODGSON to Mr. CHAMBERLAIN.

(Received July 31, 1896.)

Government House, Accra,
Sir, June 29, 1896.

In reply to your Despatch, General, of the 28th November last, on the subject of the extent to which British goods have been, or are being, displaced in the Colonies by foreign imports, I have the honour to enclose :—

A.—Returns in respect of the years 1884, 1889, and 1894, of all articles imported into the Gold Coast from foreign countries where the value of such articles imported from foreign countries amounts to 5 per cent. or upwards of the total value of such articles imported from all sources and not to a less value than 500*l*.

B.—A schedule prepared by the Comptroller of Customs giving reasons why the Colonial importer prefers the foreign article to similar goods of British manufacture.

C.—List of goods sent from English ports which it is probable are for the most part of foreign origin.

D.—Two lists showing—

(1.) Articles imported into the Gold Coast, the percentage of the importation of which from foreign countries had increased between 1884 and 1889, and

(2.) A similar return in respect of the period between 1889 and 1894.

2. Considerable difficulty has, the Comptroller of Customs reports, been experienced in complying with the instructions contained in paragraph 4 of the Despatch. He has consulted the merchants at Accra and Cape Coast, and has obtained from the latter the information embodied in enclosure B. The information otherwise obtained was not in any way superior, and he has not therefore submitted it. The information given in the enclosure in question does not properly comply, as regards arrangement, with the subheads mentioned, but the Comptroller of Customs reports that he has found it impossible to get the information to enable him to comply with the instructions contained in the Despatch, and has done the best he can under the circumstances.

3. List (2) of the lists which form enclosure D shows that the displacement of British by foreign goods is not on the increase to any marked extent as regards articles of importance, and that, as regards trade with the Gold Coast, British goods are holding their own with foreign goods. At the same time it is to be remarked that the articles enumerated in Enclosure C, although exported from London, Liverpool, or Manchester, are in many cases of foreign origin. But to what extent it is impossible to ascertain. The invoices for which bills of entry and statistics are compiled are made out in London, Liverpool, or Manchester, as the case may be, and articles of foreign manufacture are not shown separately.

4. I understand that the numerous native importers of small quantities of articles, as a general rule, entrust their orders to persons whose advertisements they see in the local newspapers, and who are very active in sending out price circulars. These persons are, as a rule, agents of foreign houses during business for them in London, Liverpool, or Manchester.

5. The one broad feature of trade with the native African appears to be this, that he will always buy what he wants at the lowest price at which he can obtain it, without any regard to quality, durability, or finish.

6. With regard to paragraph 7 of the Despatch, I have the honour to state that all the products of the Gold Coast which are exported find a market in the United Kingdom, although in some cases, as, for example, coffee, cacao, and drugs, the market is often overstocked, and prices are brought below the profitable margin. All imports are hampered by want of proper transport in the Colony, and high rates of freight by sea thence to the United Kingdom. This is more especially the case with regard to cotton, fibres, gums, and copra. I enclose copies of the freight tariffs of the two British steamer companies which are under the same management, and are not, therefore, brought into competition, the only powerful factor in reducing rates of freight.

7. I regret that I have not been placed in a position to submit the accompanying returns at an earlier date, and that they are neither as complete as I had hoped they would be, nor in the case of the important return required under paragraph 3, subhead (*b*) of the Despatch arranged in accordance with instructions.

I have, &c.,

F. M. HODGSON,

Acting Governor.

Enclosure A. in No. 12.

Return required by Paragraph 3, Sub-head (*a.*) of Mr. Secretary Chamberlain's Despatch of the 28th November, 1895, for the Years 1884, 1889, and 1894.

—	Commodity.	1884. Total Value of Importation.	1884. Value of Importation from Foreign Countries.		1889. Total Value of Importation.	1889. Value of Importation from Foreign Countries.		1894.* Total Value of Importation.	1894.* Value or Importation from Foreign Countries.	
		£ s. d.		£ s. d.	£ s. d.		£ s. d.	£ s. d.		£ s. d.
3	Apparel and slops	3,479 5 8	Brazil	17 17 10	5,861 10 7	Germany	776 17 1	19,075 17 4	Germany	1,986 18 9
			Germany	326 13 8		United States	5 18 0		African Ports	648 0 3
			France	2 0 0		African Ports	100 6 10		United States	38 3 11
			African Ports	0 6 6					France	60 19 0
			Porto Novo	6 11 8			883 1 11		Holland	1 11 7
				353 9 8						2,735 12 6
4	Arms and ammunition :—									
	a. Fire-arms (small)	—		—	5,054 12 4	Germany	281 0 1	8,705 1 0	Germany	231 11 4
						United States	8 6 8		African Ports	152 6 8
						Holland	54 0 0		France	16 9 9
						African Ports	229 0 2		Holland	78 0 0
							572 6 11			478 7 9
	b. Gunpowder	11,101 7 7	African Ports	4 17 6	3,642 19 6	Germany	367 0 11	5,631 8 0	Germany	715 8 9
			France	2,299 19 6		African Ports	100 12 3		African Ports	19 5 5
			Germany	615 5 0			467 13 2		France	737 10 8
			Porto Novo	10 0 0						1,472 4 10
				2,930 2 0						
	c. Of all other kinds	1,288 16 9	France	610 17 10	870 17 4	Germany	42 3 6	—	—	—
			Germany	66 13 0		African Ports	23 11 6			
			African Ports	6 10 0			65 15 0			
			Porto Novo	0 12 6						
				684 13 4						
5	Bags, empty	2,128 14 5	Germany	444 1 8	2,894 18 8	Germany	525 12 1	5,019 18 6	Germany	1,270 16 8
						African Ports	62 17 4		African Ports	141 11 11
							588 9 5		France	31 16 8
									United States	16 0 0
										1,460 5 8
6	Beer and ale	4,037 4 10	Germany	2,246 16 7	1,911 4 0	Germany	1,445 6 8	2,496 9 1	Germany	1,562 11 11
			African Ports	1 0 3		United States	4 0 0		African Ports	5 8 2
			United States	1 9 2		African Ports	23 18 11		Holland	96 5 8
			Porto Novo	0 12 0					France	6 3 7
				2,249 18 0			1,473 5 7			1,670 9 4

* The figures for 1894 include in value the freight and charges; those of the earlier years are understood to represent merely invoice value at port of shipment.

RETURN required by Paragraph 3, Sub-head (*a.*) of Mr. SECRETARY CHAMBERLAIN'S DESPATCH of the 28th November, 1895, for the Years 1884, 1889, and 1894—*continued.*

—	Commodity.	1884.			1889.			1894.		
		Total Value of Importation.	Value of Importation from Foreign Countries.		Total Value of Importation.	Value of Importation from Foreign Countries.		Total Value of Importation.	Value of Importation from Foreign Countries.	
		£ s. d.		£ s. d.	£ s. d.		£ s. d.	£ s. d.		£ s. d.
7	Biscuits and bread	1,725 8 11	France	3 12 0	8,035 16 8	Germany	147 5 0	—		
			Germany	16 16 8		United States	102 0 2			
			United States	189 6 2		African Ports	6 1 6			
				209 14 10			255 6 8			
9	Books, printed	—			1,098 16 5	Germany	292 19 9	4,767 12 11	Germany	1,675 18 5
									African Ports	18 9 3
									France	22 1 2
									United States	1 16 0
										1,718 4 10
10	Butter	686 5 0	United States	58 1 6	—			—		
			Germany	150 8 0						
				208 9 6						
11	Candles	—			963 0 2	Germany	104 16 2	1,253 6 1	Germany	75 13 5
						African Ports	4 1 3		France	13 19 2
							108 17 5		African Ports	2 8 3
									Portuguese Colony	5 7 2
									Holland	6 6 0
										103 14 0
14	Cement	705 13 4	Germany	242 19 7	—			—		
			France	11 2 6						
			African Ports	11 4 5						
				265 6 6						
18	Clocks and watches	—			—			673 8 0	Germany	185 8 3
									France	0 16 10
									African Ports	17 7 10
									Holland	2 8 0
									United States	15 7 6
										221 8 5

19	Coals, &c. :— *a.* Coals, cinders, and fuel	976 16 2	Germany	525 5 0		603 9 6	Germany	39 4 0		1,337 16 0	Germany France	130 10 9 234 14 2	
												365 4 11	
20	Cordage and twine	4,590 19 10	Germany Porto Novo France	847 2 11 7 8 9 9 10 0		5,558 0 10	Germany United States African ports	416 8 2 10 1 6 20 13 9		8,456 16 2	Germany France United States African Ports Holland	694 3 7 71 0 10 13 9 7 12 10 2 0 5 5	
				868 16 8				449 3 5				731 9 7	
21	Corn :— *b.* Wheat flour	2,164 17 5	Germany France Porto Novo United States	79 16 5 26 16 6 21 3 0 622 9 0		4,824 15 4	Germany United States Madeira African Ports	275 5 10 1,607 0 5 11 2 3 0 11 3		9,863 6 9	Germany United States France Holland African Ports Portuguese Colony	328 11 6 3,634 3 5 92 13 4 15 2 4 9 2 0 2 1 0	
				750 4 11				1,893 19 9				4,081 13 8	
22	Cotton yarn	—	—	—		—	—	—		10,082 0 11	Germany African Ports	2,606 0 8 8 7 7	
												2,614 8 3	
23	Cotton manufactures : *a.* Piece goods, white or plain, printed, checked or dyed, and of mixed materials.	—	—	—		159,837 4 0	Germany African Ports	9,394 10 5 2,324 7 8		214,773 19 7	Germany African Ports Holland	7,999 6 8 1,330 13 8 352 17 7	
								11,718 17 8				9,682 17 11	
	c. Thread for sewing	—	—	—		—	—	—		4,134 17 7	Germany African Ports	239 14 4 3 11 0	
												243 5 4	
	e. Hosiery and small wares	—	—	—		—	—	—		1,817 10 7	Germany African Ports Holland France	565 12 6 617 18 3 6 5 5 4 15 11	
												1,194 12 1	
24	Earthen and china ware, including manufactures of clay.	7,434 11 0	Germany African Ports United States	348 11 4 43 3 1 16 4 0		4,189 4 8	Germany United States African Ports	996 4 4 3 0 0 42 5 4		7,522 2 6	Germany African Ports France Portuguese Colony Holland	879 19 1 180 1 4 68 9 9 1 16 0 76 16 9	
				407 18 5				1,041 9 8				1,202 2 11	

RETURN required by Paragraph 3, Sub-head (*a.*) of Mr. SECRETARY CHAMBERLAIN'S DESPATCH of the 28th November 1895, for the Years 1884, 1889, and 1894—*continued.*

—	Commodity.	1884.			1889.			1894.		
		Total Value of Importation.	Value of Importation from Foreign Countries.		Total Value of Importation.	Value of Importation from Foreign Countries.		Total Value of Importation.	Value of Importation from Foreign Countries.	
		£ s. d.		£ s. d.	£ s. d.		£ s. d.	£ s. d.		£ s. d.
26	Furniture, cabinet and upholstery ware -	1,241 15 11	Brazil - -	2 10 0	3,588 9 8	Germany - -	747 2 3	1,531 17 0	African Ports -	37 18 10
			Germany - -	67 4 1		United States -	86 16 1		Germany - -	110 8 5
			United States -	119 19 6		Grand Canary -	3 0 0		United States -	14 1 1
						African Ports -	66 8 10		France - -	46 16 7
				189 13 7			853 7 2			209 4 11
27	Glass:									
	d. Of other sorts - - -	2,719 12 8	African Ports -	29 16 0	648 7 1	Germany - -	134 4 8	1,984 10 10	United State - -	18 0 0
			Germany - -	342 1 0		United States -	10 10 0		African Ports -	56 13 11
			France - -	11 6 0		African Ports -	32 2 0		Germany - -	241 19 5
			United States -	280 11 1					France - -	30 4 2
			Porto Novo -	1 5 0					Holland - -	72 6 5
				664 19 1			176 16 8			419 8 11
29	Haberdashery and Millinery - -	27,974 7 7	Germany - -	691 5 9	1,550 2 9	Germany - -	250 9 7	—	—	
			United States -	365 18 0		United States -	4 0 0			
			France - -	5 7 0		African Ports -	35 10 6			
			Brazil - -	86 7 8						
			Porto Novo - -	5 3 9						
			African Ports -	1,245 13 2						
				2,399 14 11			290 0 1			—
30	Hardware and cutlery - - -	35,473 11 3	Germany - -	2,617 19 11	14,985 9	Germany - -	4,264 1 0	20,428 8 0	Germany - -	2,456 17 1
			France - -	55 2 10		United States -	96 13 9		African Ports -	103 0 6
			United States -	37 19 1		African Ports -	113 13 4		Holland - -	3 2 1
			Porto Novo - -	22 19 3					France - -	62 6 10
			Brazil - -	61 6 3					United States -	45 13 1
			African Ports -	53 10 4						
				2,848 17 8			4,474 8 1			2,670 18 7
31	Hats of all sorts - - -	737 16 6	France - -	4 16 6	—	—		—	—	
			Germany - -	10 11 0						
			Porto Novo - -	2 18 4						
			African Ports -	29 5 0						
				47 10 10						

33	Implements and tools of industry -	—	- - - -	—	- - - -	8,187 18 10	Germany - -	4,895 17 3			
							African Ports -	158 18 8			
							Holland - -	252 15 10			
							France -	74 14 8			
							United States -	1 3 7			
								5,383 9 11			
34	Leather goods of other sorts - -	1,517 8 0	Germany - -	115 18 3	1,730 16 7	Germany - -	82 2 1	—	—		
			United States -	29 2 11		United States -	49 9 0				
			France - - -	18 11 5		Teneriffe -	2 5 0				
			Madeira - -	38 5 0		African Ports -	5 6 6				
			Porto Novo - -	5 4 3							
			African Ports -	8 19 7							
				210 18 5			138 15 7				
37	Machinery :—										
	b. Of other sorts - - - -	2,496 15 7	Germany - -	149 7 7	—	- - - -		5,400 19 7	Germany - -	665 14 8	
			African Ports -	15 10 0					France - - -	10 7 6	
									African Ports -	3 15 0	
				164 17 7						679 17 2	
39	Medicines - - - -	2,214 8 8	Germany - -	50 3 9	3,080 10 1	Germany - -	309 5 6	3,911 7 5	Germany - -	256 17 6	
			United States -	48 0 2		United States -	268 19 8		United States -	206 14 1	
			France - - -	6 8 0		African Ports -	3 8 3		Holland - -	7 10 0	
			Brazil - -	12 10 0					African Ports -	5 14 10	
			Porto Novo -	4 15 6					France - -	13 12 10	
									Portuguese Colony	2 3 3	
				121 8 3			476 13 5			492 12 6	
40	Metals :—										
	a. Iron :—										
	(*h.*) Cast or unwrought, and all other iron manufactures.	—	- -	- -	—	-	- -	1,863 2 10	Germany - -	438 19 7	
									Holland - -	47 2 0	
									France - -	2 16 4	
									African Ports -	1 9 9	
										490 7 8	
	b. Copper :—										
	c. Brass of all sorts - -	—	- - - -	—	- - - -	7,081 8 10	Germany - -	768 5 7			
							African Ports -	58 13 11			
							France - - -	10 15 10			
								837 15 4			
	d. Lead - - - -	—	- - - -	—	- - - -	2,889 13 2	Germany - -	221 15 7			
							France - - -	195 10 0			
								417 5 7			

Return required by Paragraph 3, Sub-head (*a.*) of Mr. Secretary Chamberlain's Despatch of the 28th November 1895, for the Years 1884, 1889, and 1894—*continued.*

—	Commodity.	1884.			1889.			1894.		
		Total Value of Importation.	Value of Importation from Foreign Countries.		Total Value of Importation.	Value of Importation from Foreign Countries.		Total Value of Importation.	Value of Importation from Foreign Countries.	
		£ s. d.		£ s. d.	£ s. d.		£ s. d.	£ s. d.		£ s. d.
41	Musical instruments	656 6 5	Germany	296 5 8	679 16 4	Germany	160 5 5	1,920 7 11	Germany	253 18 9
			African Ports	3 0 0		African Ports	4 12 6		African Ports	32 17 7
									Holland	23 1 2
									France	42 14 9
									United States	14 8 2
				299 5 8			164 17 11			367 0 5
44	Painters' colours and materials	7,775 18 10	African Ports	43 15 7	1,868 8 1	Germany	182 8 10	1,221 6 3	Germany	91 3 4
			Porto Novo	91 12 8		United States	145 0 6		France	34 4 8
			Germany	1,423 12 7		African Ports	22 10 0		United States	6 16 0
			France	121 10 6					African Ports	0 16 2
			Teneriffe	7 2 6						
			United States	264 7 8						
			Brazil	34 16 0						
			Madeira	100 14 6						
				2,087 12 0			349 19 4			133 0 2
49	Provisions	20,259 19 3	African Ports	60 8 9	16,069 19 7	Germany	2,223 5 0	35,959 5 0	Germany	3,662 0 1
			Germany	871 14 9		African Ports	76 5 0		African Ports	192 9 3
			United States	2,158 19 4					France	616 5 6
			France	57 9 7					United States	151 8 0
			Porto Novo	22 10 0					Portuguese Colonies	44 15 7
			Teneriffe	7 11 11					Holland	10 19 11
			Madeira	79 13 6						
				3,258 0 10			2,299 10 0			4,677 18 4
51	Salt	7,027 16 9	France	163 5 2	1,818 3 6	Germany	356 5 8	11,601 8 5	France	4,235 19 8
			Germany	4,246 17 3		African Ports	217 12 6		Germany	148 10 9
									African Ports	0 6 0
				4,410 2 5			573 18 2			4,379 16 5
54	Silk manufactures	9,344 14 5	Germany	257 12 1	7,165 16 10	Germany	340 11 2	5,582 10 11	Germany	730 9 4
			France	4 1 0		African Ports	130 3 1		African Ports	91 14 4
			Brazil	25 10 0						
			African Ports	344 11 4						
			Porto Novo	24 12 0						
				656 6 5			470 14 3			822 3 8

57	Spirits:—											
	a. Brandy - - - -	1,251 12 0	Germany -	313 2 7	—	- - - - -	702 4 2	Germany -	58 6 7			
								France - -	52 4 10			
								African Ports -	6 18 0			
									117 9 5			
	b. Gin - - - -	122,830 14 1	Germany	104,850 4 3	10,685 8 0	Germany -	4,982 18 6	28,863 11 5	Holland - -	21,090 19 5		
			African Ports -	582 8 9		Holland - -	4,798 1 0		Germany -	3,130 6 3		
			Porto Novo -	8 7 6		African Ports -	89 18 6		African Ports -	19 1 5		
				105,440 15 6			9,870 18 0			24,240 7 1		
	c. Rum - - - -	109,758 14 10	African Ports -	161 18 3	33,755 9 11	United States -	22,133 2 8	74,968 8 10	United States -	54,321 3 3		
			Germany -	18,085 15 10		Germany -	782 9 3		Germany -	13,239 14 10		
			United States -	85,206 17 0		Holland - -	69 12 6		France - -	1,104 17 6		
			France - -	171 17 8		African Ports -	737 5 6		African Ports -	61 16 3		
			Brazil - -	4,240 8 7					Holland - -	253 3 11		
			Teneriffe -	50 10 0					Portuguese Colony	28 17 9		
			Porto Novo -	49 19 0								
				107,967 1 2			23,722 9 11			69,509 12 11		
	d. Unenumerated - - -	—	- - -	- -	—	- - -	- -	608 10 6	Germany -	255 1 7		
									Holland - -	77 6 6		
									France - -	46 6 4		
									African Ports -	1 1 7		
										379 16 0		
58	Stationery - - - -	1,741 16 6	African Ports -	3 0 9	2,142 19 2	Germany - -	518 0 0	5,102 6 1	Germany -	542 0 4		
			Germany -	229 15 9		United States -	0 10 0		France - -	22 14 5		
			United States -	5 4 2		African Ports -	2 5 7		United States -	5 0 2		
			France - -	20 12 9					Holland - -	2 10 5		
			Madeira -	9 7 0					African Ports -	0 12 0		
			Porto Novo -	4 10 9								
				272 11 12			520 15 7			578 17 4		
61	Sugar (refined) - - - -	2,035 14 8	Germany -	73 0 8	3,678 3 8	Germany -	674 2 2	6,416 10 9	Germany -	1,252 8 5		
			African Ports -	19 4 3		United States -	163 5 7		France - -	150 4 8		
			France - -	20 2 5		African Ports -	18 18 0		African Ports -	8 7 8		
			United States -	190 3 1					Portuguese Colony	0 18 8		
			Brazil - -	9 7 6								
			Porto Novo -	13 17 1								
				325 15 0			856 5 9			1,411 19 5		
63	Umbrellas and parasols - -	—	- - -	- -	1,198 16 2	Germany -	155 4 6	4,143 3 4	Germany -	603 7 1		
						African Ports -	3 17 6		France - -	17 1 10		
									African Ports -	2 19 11		
							159 2 0			623 8 10		

RETURN required by Paragraph 3, Sub-head (*a.*) of Mr. SECRETARY CHAMBERLAIN'S DESPATCH of the 28th November, 1895, for the Years 1884, 1889, and 1894—*continued.*

—	Commodity.	1884.			1889.			1894.		
		Total Value of Importation.	Value of Importation from Foreign Countries.		Total Value of Importation.	Value of Importation from Foreign Countries.		Total Value of Importation.	Value of Importation from Foreign Countries.	
		£ s. d.		£ s. d.	£ s. d.		£ s. d.	£ s. d.		£ s. d.
64	Wood and timber manufactures, staves, empty casks, and unenumerated.	28,117 3 4	Germany -	2,112 2 7	12,514 2 6	Germany -	2,309 5 3	25,020 6 9	Germany -	776 19 1
			United States -	13 10 0		United States -	618 15 0		France - -	4,231 7 1
			France - -	1,957 16 8		France - -	757 10 0		African Ports -	401 10 3
			Brazil - -	26 8 0		Holland - -	496 15 0		United States -	730 0 6
			African Ports -	188 7 6		African Ports -	259 10 0		Holland - -	237 4 2
			Porto Novo -	35 0 0						
				4,333 4 9			4,441 15 3			6,377 1 1
67	Woollen and worsted manufactures :—									
	a. Woollen tissues - -	—	- - -	- -	—	- - -	- -	8,260 18 5	Germany -	998 18 10
									African Ports -	121 8 0
										1,120 6 10
	d. Blankets - - - -	—	- - -	- -	—	- - -	- -	1,407 11 9	African Ports -	357 11 7
									Germany -	83 15 0
									France - -	0 13 6
										442 0 1
	g. Of all other sorts - - -	2,900 19 3	Germany -	68 12 3	2,399 18 0	Germany -	522 15 4	1,020 12 0	African Ports -	383 17 7
			Brazil - -	16 0 0		United States -	10 13 3		Germany -	28 19 3
			United States -	36 11 3		Liberia - -	0 12 0		France - -	1 0 0
			African Ports -	88 1 0		African Ports -	49 1 10			
			Porto Novo -	16 7 6						
				220 12 0			583 2 5			413 16 7

Custom House, Accra,
June 10, 1896.

F. W. MAJOR,
Comptroller.

Enclosure B. in No. 12.

Reasons why the Colonial Importers prefer the Foreign Article to Similar Goods of British Manufacture, Paragraph 4 of Despatch of 28th November.

Articles.	(a.) Price.	(b.) Quality and Finish.	(c.) Suitability of Goods for Market.	(d.) Difference in Making Up or Packing.	(e.) False Marking.	(f.) Any other cause that may exist.
Apparel and Slops	It is not possible for me to enter into this question. Where large orders are placed the prices arranged include all charges f.o.b. at port of export, and, with the exception of the steamer freights, the importers can say little about the particular points in the cost referred to in Mr. Chamberlain's Despatch.	In these respects there is resemblance amongst manufacturers.	always close the different		It is unusual to find any disguise as to origin, the native caring little where his goods come from so long as they are cheap; nor is it usual to find false indication as to weight or measure. I believe some goods, such as gunpowder, are occasionally imported in packages which do not contain the full quantity the package, as known to the native, is capable of containing. But there is no indication of the weight or measure on the packages in such cases; there is no necessity for it. The native cannot read as a rule, and only buys if the package looks to be what he has been in the habit of buying.	Low price.
Bags, empty						As might be expected, these follow upon the lines of our remarks upon caskage. The export of produce to Rotterdam, Hamburg, being large, these bags are returned again for second and third use. It is also a staple industry of Saxony.
Beer						German is preferred to English by beer drinkers as lighter and healthier. It is carefully prepared for export by double brewing, not chemically treated, as so much English beer is. Price is about the same, whilst quality is superior. Packing in cases of four dozen, instead of casks of 10 dozen, and results in less breakage. Freights the same.
Brandy						The import from foreign ports is, no doubt, due to the demand of the French and German residents in conjunction with increasing facilities of transport by lines of steamers.
Printed Books						Probably due to the increase in number of schools and scholars under tuition by Basle and other foreign missions. Works in the vernacular are chiefly published by them.
Candles						The manufacture for export of these goods appears to be confined to Rotterdam, Belgium, and Southern France. No doubt their cheapness results from the rebate upon exports. The candles are sold retail at 1*d.* each in the colony, or 6*d.* per lb.
Coals						Foreign houses established in the Volta and Axim districts. Again, it is convenient to ship in casks when caskage is required by coal users, as by this means freight is saved upon it.
Earthenware:—Plates, Bowls, and Chambers.						Dresden and other noted towns manufacture cheap, elegant, well packed.
Flour						This is but natural, since the British Isles have to import for their own support. Direct sailings from Boston, with low freights and exceeding whiteness of their production, make the demand from the United States supreme. The supplies from elsewhere are largely dependent upon the particular nationality of individual importers.
Furniture						Chiefly bentwood work from Vienna, elegant and light. Made for export to save freight by putting up in small sections, and sending tools to set up here with.
Geneva						Rotterdam and Netherlands the sole distillers of this class of spirits.
Glass of sorts:—Decanters, Glasses, Demijohns, empty.						Cheap job-lots demijohns and fancy articles from Bohemia, Saxony, and Berlin.
Gunpowder						Quality much improved in make. Exactly similar to well-known English brands. Kegs are much better made, price lower, and cheaper transit rates. Foreign competition also imports largely from their own ports.
Haberdashery						Cheapness and finish.
Hardware and Cutlery						Matchets, table, spear, butcher, and every form of knife, are very cheap. Implements and tools may be included under this head. The finish of all is good, and the low price appears to make up for the inferior durability of these goods. Internal transit rates are lower, and freights, although the same by steamer, are in favour of the foreign article, as being delivered in better condition. Woerman Line is subsidised also, some part of which is, no doubt, shared with clients.

Reasons why the Colonial Importers prefer the Foreign Article to Similar Goods of British Manufacture, Paragraph 4 of Despatch of 28th November—*continued.*

Article.	(*a.*) Price.	(*b.*) Quality and Finish.	(*c.*) Suitability of Goods for Market.	(*d.*) Difference in Making Up or Packing.	(*e.*) False Marking.	(*f.*) Any other cause that may exist.
Medicines	See preceding page	- -	- -	- -	- - -	Cheap German quinine and patent nostrums, including not only drugs, but medicated soaps, dentifrices, and ointments.
Salt						The particular salt required very largely in this colony, is the rock, or crystal—more commonly called "Fishern" salt—and the district from which it is derived chiefly, the Gulf of Lyons, ports of Bone and Marseilles, from which sailing vessels of Danish and Italian nationality can be chartered at extremely low rates. The English trade has been much upset by the action of the Salt Union in keeping up prices. Local discoveries are yearly increasing, and imports diminishing in consequence.
Silk Goods						Chiefly in low grade price goods, specially made for the trade, and essentially a continental traffic.
Stationery						Much of this is, no doubt, for the use of schools, foreign houses of business, and partly only for trade. Qualities are various and cheap; in some cases also the finish is superior, and the water lining is appreciated.
Sugar, Refined						Tablet beet sugar in cubes and boxes, very low priced, as the rebates at port of export make it impossible to retail this article in the colony below the current rate in the district shipped from. The difficulties under which British sugar has been labouring is, however, well known, and needs no further comment.
Timber :—Staves and Shooks						From the Baltic and American ports, no other building wood available. The import of staves and empty casks will be, to some extent, in the ratio of increase in the number of foreign houses establishing or extending French, German, American, &c. Also some of the English houses import second-hand caskage from continental ports, where it may be purchased cheaply. This caskage having originally been shipped from the Colony with produce, a large export going to Havre, Hamburg, Marseilles, and Antwerp. Marseilles is a particularly cheap port to buy in.
Umbrellas						Are very low in price, and forms one of a large class of import dependent more upon opportunities of buying old stocks in auction. It is a question whether, upon the Continent, these are not of more frequent occurrence, manufacturers aiming to keep their works running constantly with periodical allowances. The fancy goods trade is essentially liable to depression and bankruptcy.
Woollen and Worsted Goods						Cheap goods, machine made, including tweeds, cheviots, serges, and suiting mixtures, singlets, socks, caps.
						General.
						Stoppage of trade or manufacture in the country of export caused by frequent disputes with trade societies. Trade combinations to raise prices. Higher freights and other dues, and restrictive regulations at the port of export. Increase in number of foreign shipping companies, and the general and systematic piracy of English trade by young foreigners, who have obtained appointments in any English house of business.

F. W. MAJOR, Comptroller.

Enclosure C. in No. 12.

LIST of GOODS sent from ENGLISH PORTS which it is probable are for the most part of Foreign Origin.

Cigars.	Musical instruments.	Rubber goods, as vulcanite.
Tobacco in leaf and manufactured.	Scientific instruments.	Combs.
Silks.	Millinery.	Celluloid articles.
Velvets.	Beads.	Coral.
Butter.	Salted meats.	Perfumery and toilet goods.
Lamps.	Wines.	Matches.
Jewellery.	Preserved fruit.	Pens.
Watches and clocks.	Gold and silver laces and fringes.	Cedar pencils.
		Sardines.

Leaf tobacco and rum from United States are carried at low through rates *viâ* Liverpool. Cigars appear to be more cheaply made abroad. The other goods appear little represented by English makes, and in most cases are very low.

F. W. MAJOR,
Comptroller.

Custom House, Accra,
June 10, 1896.

Enclosure D. (1) in No. 12.

LIST of ARTICLES imported into the Gold Coast, the Percentage of Importation of which from Foreign Countries increased in the period between the years 1884 and 1889.

Apparel and slops.	Haberdashery.
Beer and ale.	Medicines.
Books, printed.	Spirits—
Candles.	*a.* Gin.
Corn—	Stationery.
b. Wheat flour (slightly).	Sugar, refined.
Earthen and china ware, including manufactures of clay.	Umbrellas and parasols.
Furniture, cabinet and upholstery ware.	Wood and timber manufactures staves, &c.
Glass of other sorts (slightly).	Woollen and worsted manufactures of all other sorts.
Hardware.	

F. W. MAJOR,
Comptroller.

June 10, 1896.

Enclosure D. (2) in No. 12.

LIST of ARTICLES imported into the GOLD COAST, the Percentage of Importation of which from Foreign Countries increased in the period between the years 1889 and 1894.

Gunpowder.	Machinery of other sorts.
Bags, empty.	Salt.
Books, printed.	Silk manufactures.
Coals.	Spirits, brandy.
Cordage and twine (very slight).	Umbrellas and parasols.

F. W. MAJOR,
Comptroller.

June 10, 1896.

No. 13.

ACTING GOVERNOR CAULFEILD to MR. CHAMBERLAIN.

(Received April 8, 1896.)

Government House, Freetown, Sierra Leone,
March 19, 1896.

SIR,

IN compliance with the instructions conveyed in your Despatch of 28th November 1895, I have the honour to transmit :—

(1.) A comparative return of all articles of the value of 500*l.* and upwards, imported into the Colony of Sierra Leone from all sources in the years 1884, 1889, and 1894 and the proportion, amounting to and not exceeding 5 per cent., which foreign articles bear to similar goods of British manufacture.

(2.) Return of reasons which may have in each case induced the Colonial importer to prefer a foreign article to similar goods of British manufacture.

2. A copy of your Despatch under reply was forwarded to the Sierra Leone Chamber of Commerce inviting such suggestions as they may consider desirable, and at the same time to forward specimens of the articles to which they wish to draw special attention, and I now forward a copy of the opinions of that body based on the returns prepared by the Collector of Customs, and which were referred to the Chamber for their information and guidance.

I have, &c.

J. E. CAULFEILD,
Deputy Governor.

COMPARATIVE RETURN of all ARTICLES of the VALUE of 500*l.* and upwards, imported into the COLONY of SIERRA LEONE from all SOURCES in the Years 1884, 1889, and 1894, and the PROPORTION which FOREIGN ARTICLES, amounting to and exceeding Five per Cent., bear to similar Goods of BRITISH MANUFACTURE.

No.	Commodity.	1884. Total Value of Importation.	1884. Value of Importation from Foreign Countries. Countries.	1884. Value.	1889. Total Value of Importation.	1889. Countries.	1889. Value.	1894. Total Value of Importation.	1894. Countries.	1894. Value.	Remarks.
		£ s. d.		£ s. d.	£ s. d.		£ s. d.	£ s. d.		£ s. d.	
8	Apparel - -	2,209 9 5	France - -	155 1 10	—	——	—	11,539 8 1	France - -	223 5 7	Articles of light under-clothing from foreign countries, particularly France and Germany, are cheaper and more serviceable than similar goods from Great Britain.
			Germany - -	8 0 0					Germany - -	367 4 1	
			Windward Coast	12 5 0					Senegal - -	6 8 8	
			Leeward Coast -	177 5 0					Dakar - -	20 17 0	
			America -	24 0 0					Windward Coast	37 8 0	
									Leeward Coast -	37 9 0	
									Liberia - -	16 10 6	
									America -	42 18 6	
			Total -	371 11 10					Total -	750 15 11	
4	Arms and ammunition :—										
	(*a*) Firearms -	1,680 0 10	France - -	281 4 6	684 18 11	France - -	17 0 0				
			Germany - -	54 8 0		Germany - -	85 18 6				
			Windward Coast	4 0 0		Goree - -	3 11 0				
			Leeward Coast -	4 10 0		Windward Coast	28 8 0				
						Leeward Coast -	27 9 0				
						America -	21 17 6				
			Total -	344 2 6		Total -	184 4 0				
	(*b*) Gunpowder -	3,200 1 8	Germany - -	1,137 14 8	2,366 14 9	Germany -	1,761 3 2	997 7 5	Germany - -	964 4 10	Price, Germany, per barrel of 100 lbs., 22*s.* 1*d.* Price, Great Britain, per barrel, 25*s.* 5*d.* Almost exclusively from Germany, where the price per barrel as above quoted is 22*s.* 1*d.*, against 25*s.* 5*d.* British, besides the additional advantage in being put up in better kegs, in favour of the German article.
			Leeward Coast -	2 5 0		Leeward Coast -	20 0 0				
			Total -	1,139 19 8		Total -	1,781 3 2				
4	(*c*) Of all other kinds	812 18 2	France - -	34 16 6							
			Germany - -	2 12 0							
			Leeward Coast -	0 5 0							
			America -	3 15 0							
			Total -	41 8 6							

No.	Commodity.	1884.			1889.			1894.			Remarks.
		Total Value of Importation.	Value of Importation from Foreign Countries.		Total Value of Importation.	Value of Importation from Foreign Countries.		Total Value of Importation.	Value of Importation from Foreign Countries.		
			Countries.	Value.		Countries.	Value.		Countries.	Value.	
		£ s. d.		£ s. d.	£ s. d.		£ s. d.	£ s. d.		£ s. d.	
6	Beer and ale	3,438 14 5	France Germany Goree Leeward Coast America	268 15 0 351 3 3 0 4 0 0 3 0 241 6 9	2,363 12 5	France Germany Goree Windward Coast Leeward Coast America	7 18 5 708 0 1 0 4 0 0 3 0 25 16 8 3 2 6	3,136 9 6	France Germany Goree Leeward Coast	1 17 6 341 7 3 10 3 0 4 8 6	The German lager beer being milder and cheaper, though not superior to the British beer, is preferred and gradually rising in demand than the other of British manufacture. The quotations are :— German, per dozen quarts, 5*s.* 6*d.* British, per dozen quarts, 6*s.* 6*d.*
			Total	861 12 0		Total	745 9 8		Total	357 16 3	
7	Biscuit and bread	2,044 11 9	France Germany Leeward Coast America	2 9 0 0 16 0 9 6 0 1,554 1 9	1,470 18 10	Germany Leeward Coast America	5 2 0 26 18 0 773 17 6	4,261 8 1	France Germany Leeward Coast America	0 7 6 27 17 6 74 6 6 686 6 0	This is due to large importations from America of bread, which, though inferior in quality to same article from Great Britain, is by far cheaper.
			Total	1,566 12 9		Total	805 17 6		Total	788 17 6	
9	Books (printed)	1,075 10 9	France Germany Leeward Coast America	9 6 11 0 10 0 3 15 0 45 3 1							
			Total	58 15 0							
10	Butter	—	—	—	1,212 10 9	France Germany America	12 0 0 8 4 7 74 1 8				
						Total	94 6 3				
11	Candles of all sorts	1,481 8 7	France America	621 17 11 74 5 5	778 4 10	France Germany Leeward Coast America	338 17 11 117 3 6 1 11 0 7 5 10	1,455 12 6	France Germany Dakar Goree Windward Coast Leeward Coast	184 0 0 213 4 9 0 10 0 0 2 0 80 9 6 0 3 4	A large proportion of candles imported from Great Britain is evidently of foreign manufacture, from the fact of the cost of transport from France and Germany to the United Kingdom, being shown on the face of invoices produced at the Custom-house.
			Total	696 8 4		Total	464 18 8		Total	477 9 7	

14	Cement - -	689 13 4	France - -	199 15 6	—	—	—	1,316 18 8	France - -	85 5 0	The only importations of this article from foreign countries, are from France and America, by the two houses of these nationalities trading in the Colony.
			America -	12 10 0					Germany -	4 11 0	
									Leeward Coast -	0 15 0	
									America -	11 19 7	
			Total - -	212 5 6					Total - -	102 10 7	
19	Coals, &c. :— (a) Coals, cinders, and fuel.	2,858 16 4	France - -	312 15 0							
20	Cordage and twine -	1,649 5 4	France - -	114 14 0	1,169 12 3	France - -	266 0 9	1,083 8 5	France - -	76 7 0	The only importations of this article from foreign countries, are from France and America, by the two houses of these nationalities trading in the Colony.
			Denmark -	11 14 0		Leeward Coast -	0 7 0		Windward Coast	15 5 5	
			America -	96 10 2		America -	9 17 1		America -	23 11 11	
			Total - -	222 18 2		Total - -	276 4 10		Total - -	115 4 4	
21	Corn :— (b) Wheat flour -	3,977 11 11	Germany -	2 16 0	6,527 6 1	Windward Coast	67 2 2	7,891 5 9	Leeward Coast -	7 14 6	Price per barrel of 196 lbs. is 22s. 2d. from Great Britain, against 18s. 2d. from America; latter being found more suitable for making soft bread by more readily taking leaven, and thus more profitable to bakers, is preferred to flours of British manufacture.
			Teneriffe -	120 0 0		America -	6,077 6 9		America -	5,907 0 8	
			Windward Coast	2 10 0							
			America -	3,659 16 5							
			Total - -	3,785 2 5		Total - -	6,144 8 11		Total - -	5,914 15 2	
24	Earthenware and chinaware, including manufactures of clay.	2,382 19 5	France - -	90 14 3							
			Germany -	116 10 0							
			Denmark -	2 10 0							
			Windward Coast	3 14 6							
			Leeward Coast -	1 0 0							
			America -	5 13 1							
			Total - -	220 1 10							
26	Furniture :— Cabinet and upholstery wares.	2,085 11 1	France - -	412 8 5	968 18 5	France - -	187 8 3	1,922 12 10	France - -	38 2 2	Principally chairs, caned and rush bottomed, from France and America. No appreciable importation of upholstery furniture from foreign countries. Furniture from France is frequently landed at Conakry (Windward Coast) and forwarded to Sierra Leone.
			Germany -	19 7 6		Goree - -	3 0 0		Germany -	61 0 3	
			Teneriffe -	1 10 0		Dakar - -	1 10 0		Madeira -	0 14 3	
			Goree - -	3 0 0		Madeira - -	11 6 6		Grand Canary -	1 11 0	
			Windward Coast	5 5 0		Windward Coast	4 15 0		Senegal -	3 13 0	
			Leeward Coast -	22 19 4		Leeward Coast -	2 19 0		Dakar - -	5 12 4	
			America - -	459 3 5		Liberia - -	50 0 0		Windward Coast	108 18 4	
						America -	141 5 2		Leeward Coast -	5 14 6	
									America -	168 16 1	
			Total -	928 13 3		Total -	402 3 11		Total -	399 2 4	

No.	Commodity.	1884.			1889.			1894.			Remarks.
		Total Value of Importation.	Value of Importation from Foreign Countries.		Total Value of Importation.	Value of Importation from Foreign Countries.		Total Value of Importation.	Value of Importation from Foreign Countries.		
			Countries.	Value.		Countries.	Value.		Countries.	Value.	
27	Glass :— (*a*), (*b*), (*c*), and (*d*), of all sorts.	£ s. d. 1,448 17 2	France - -	£ s. d. 12 5 0	£ s. d. —	——	£ s. d. —	£ s. d. 2,047 1 9	France - -	£ s. d. 27 0 5	Cheaper pane glasses for doors, window shutters, and other glassware are now obtained from Germany, and are generally lessening importations from Great Britain.
			Germany -	88 12 2					Germany -	304 19 0	
			Leeward Coast -	8 13 6					Senegal -	0 4 6	
			Liberia - -	4 10 0					Windward Coast	16 18 7	
			America -	59 8 1					Leeward Coast -	26 0 3	
									Liberia - -	2 18 0	
									America -	85 3 6	
			Total -	168 3 9					Total -	463 4 3	
29	Haberdashery and millinery.	—	——	—	—	——	--	21,206 7 1	France - -	252 0 4	French and German articles of ladies' fineries and haberdashery, being brighter and more attractive, are becoming gradually preferable to similar articles from Great Britain. Articles of Swiss manufacture and make, coming through Germany, are imported as from Germany. Others from France, landed at Conakry and subsequently brought to Sierra Leone, are carried to account under Windward Coast.
									Germany -	156 16 5	
									Grand Canary -	76 2 0	
									Senegal -	13 15 3	
									Dakar - -	9 4 0	
									Goree - -	41 9 8	
									Bulama - -	8 0 0	
									Windward Coast	360 12 1	
									Leeward Coast -	299 4 7	
									Liberia - -	18 13 10	
									America -	64 11 0	
									Total -	1,300 9 2	
30	Hardware and cutlery	—	——	—	11,515 13 2	France - -	229 19 3	23,781 9 5	France - -	114 8 5	Nails are now imported regularly from France and Germany. The wire nails, or points de Paris, being safer and stronger in carpentry work, besides being cheaper in value, are fast replacing the 6, 8, 10, and 20 penny nails of English manufacture. Price of wire nails 10*s.* per cwt., as against British nails 18*s.* per cwt. Samples of locks, hinges, and bolts, and like articles of British make, have been sent to France and Ger-
						Germany - -	1,201 11 8		Germany -	2,039 17 2	
						Grand Canary -	2 0 0		Senegal - -	12 11 10	
						Goree - -	0 12 0		Goree - -	27 8 7	
						Windward Coast	31 9 0		Dakar - -	0 4 0	
						Leeward Coast -	61 1 6		Windward Coast	227 18 9	
						Liberia - -	65 2 6		Leeward Coast -	96 11 6	
						America -	250 1 6		Liberia - -	1 5 11	
									America -	377 5 1	
						Total -	1,841 17 0		Total -	2,897 6 3	

												many, made at a cheaper rate, and introduced into the Colony to the prejudice of those of British manufacture. Cutlery, namely, matchets and sword blades, are principally imported from Germany, being better suited to the trade of the Colony and cheaper.
31	Hats of all sorts -	—	—	—	2,162 19 5	France - -	128 6 11	5,868 2 1	France - -	402 14 2	Same as haberdashery.
						Germany - -	2 7 0		Germany - -	213 5 0	
						Goree - -	0 5 0		Senegal -	1 1 0	
						Leeward Coast -	0 11 0		Gores - -	0 4 6	
									Bulama - -	3 1 0	
									Windward Coast	164 13 6	
									Leeward Coast -	6 8 6	
						Total - -	131 9 11		Total - -	791 7 8	
34	Leather :— (*b*) Wrought, boots and shoes.	—	—	—	1,020 5 3	France - -	113 2 11	1,649 15 2	France - -	44 0 6	No appreciable increase of foreign manufactures, although the various foreign firms in the Colony are placing in the market importations from their respective countries.
						Germany - -	0 11 6		Germany - -	49 2 3	
						Windward Coast	5 0 0		Madeira -	2 1 6	
						Leeward Coast -	0 6 0		Grand Canary -	0 16 0	
						America - -	33 0 0		Senegal - -	0 7 0	
									Goree - -	0 5 3	
									Windward Coast	10 3 3	
									Leeward Coast -	3 13 6	
									America - -	1 3 6	
						Total - -	152 0 5		Total - -	117 2 9	
39	Medicines - -	2,188 11 1	France - -	18 1 4	2,213 8 7	France - -	78 4 5	3,132 13 3	France - -	93 0 9	Due to introduction of patent medicines from America, 10 per cent. of the importations into this Colony being more from that country.
			Madeira -	0 17 0		Windward Coast	0 10 0		Germany - -	10 15 9	
			Windward Coast	1 15 10		Leeward Coast -	15 12 0		Senegal -	0 10 0	
			Leeward Coast -	0 10 0		Liberia - -	0 2 0		Goree - -	1 19 11	
			America - -	239 9 8		America -	265 9 4		Bulama - -	0 3 0	
									Windward Coast	28 0 6	
									Leeward Coast -	2 9 0	
									Liberia - -	0 3 6	
									America -	264 0 4	
			Total - -	260 13 10		Total - -	350 17 9		Total - -	399 2 9	

No.	Commodity.	1884. Total Value of Importation.	1884. Value of Importation from Foreign Countries. Countries.	1884. Value.	1889. Total Value of Importation.	1889. Value of Importation from Foreign Countries. Countries.	1889. Value.	1894. Total Value of Importation.	1894. Value of Importation from Foreign Countries. Countries.	1894. Value.	Remarks.
		£ s. d.		£ s. d.	£ s. d.		£ s. d.	£ s. d.		£ s. d.	
41	Musical instruments -	928 7 2	France - -	82 16 2	—	——	—	977 7 9	Germany - -	90 10 7	Foreign importations under this head are not in excess of what might reasonably be expected.
			Germany - -	1 10 0					Senegal - -	0 2 6	
			Leeward Coast -	27 10 0					Dakar - -	14 14 8	
			America - -	126 11 8					Leeward Coast -	57 15 6	
									America - -	29 12 11	
			Total - -	238 7 5					Total - -	192 16 2	
43	Oil, seed - -	956 6 7	France - -	621 13 11							
—	Oil, kerosine - - -	2,987 12 6	Germany - -	1 10 0	2,991 5 0	Germany - -	4 0 9	2,623 8 8	Grand Canary -	331 15 4	Importations of this article are made almost exclusively from foreign countries, America especially. Not in the list of imports although of daily use in the Colony.
			Denmark -	0 6 0		Windward Coast	86 17 6		Windward Coast	70 11 2	
			Windward Coast	157 15 0		Leeward Coast -	0 3 0		Leeward Coast -	12 10 6	
			Leeward Coast -	1 0 0		America - -	2,894 10 6		America - -	2,078 17 6	
			America - -	2,824 19 6							
			Total - -	2,985 10 6		Total - -	2,985 11 0		Total - -	2,493 14 6	
44	Painters' colours and materials.	—	——	—	1,289 6 2	France - -	96 12 11				
						Goree - -	0 10 0				
						Leeward Coast -	3 10 6				
						Total -	100 13 5				
45	Paper (other than hangings) and other stationery.	1,978 5 7	France - -	85 6 8	1,535 4 7	France - -	202 13 11				
			Leeward Coast -	2 10 0		Germany -	1 4 0				
			America - -	54 4 8		Teneriffe - -	0 3 4				
						America -	13 6 7				
			Total -	142 1 4		Total -	216 7 10				

49	Provisions not otherwise described.	15,110 17 0	France - -	592 9 11	11,076 9 4	France - -	1,634 7 9	23,566 1 2	France - -	550 11 10	Although foreign importations of these articles amounted to 12, 31, and 13 per cent. of total imports in 1884, 1889, and 1894 respectively, yet there is no prospect of their eventually replacing similar articles from Great Britain. The foreign trade is influenced by importations from France and America, and, to some extent, from Germany.
			Germany - -	98 4 6		Germany -	22 10 0		Germany -	434 1 5	
			Teneriffe -	19 4 0		Madeira - -	4 13 0		Grand Canary -	35 8 9	
			Grand Canary -	10 3 0		Grand Canary -	7 7 6		Teneriffe - -	7 12 0	
			Windward Coast	5 7 0		Teneriffe - -	11 10 6		Madeira -	2 0 0	
			Leeward Coast -	134 6 6		Goree - -	0 7 9		Senegal - -	18 4 8	
			America - -	952 2 9		Senegal - -	0 1 0		Dakar - -	18 3 0	
						Windward Coast	10 2 0		Goree - -	86 9 9	
						Leeward Coast -	272 1 5		Windward Coast	260 12 4	
						America - -	1,420 4 0		Leeward Coast -	723 12 4	
									Liberia - -	9 13 1	
									America - -	993 12 1	
			Total -	1,811 17 8		Total -	3,443 4 11		Total -	3,140 1 8	
54	Silk manufactures:— (a) and (b) Broad piece goods and of other kinds.	—	—	—	—	—	—	693 19 8	France - -	20 10 0	Although total foreign importation is over 5 per cent. in 1894, yet that from Great Britain are not thereby replaced to any appreciable extent.
									Germany -	50 4 3	
									Leeward Coast -	4 3 0	
									Total -	74 17 3	
56	Soap - - -	—	—	—	551 10 6	France - -	109 10 8	972 19 11	France - -	20 10 7	
						Leeward Coast -	8 4 1		Germany -	10 13 9	
						America - -	21 7 1		Dakar - -	0 2 0	
									Goree - -	34 5 2	
									Windward Coast	0 1 0	
									Leeward Coast -	2 0 10	
									America - -	18 0 0	
						Total -	139 1 10		Total -	85 13 4	
57	Spirits - - -	86,701 10 10	France - -	1,181 11 6	23,066 8 9	France - -	300 11 8	27,576 10 2	France - -	176 8 0	Foreign spirits amount to quite two-thirds of total imports. Of these, Germany and the Netherlands supply about nine-tenths, the balance of one-tenth by France and America. Geneva and rum in demijohns, known as trade gin and rum, owing to the margin of the profit which they leave to importers in the payment of Customs duties by reason of their low strength, are obtained exclusively from Germany and the Netherlands. Hence the preference given to them.
			Germany -	16,314 5 8		Germany -	14,571 16 3		Germany -	17,283 4 9	
			Goree - -	0 12 6		Senegal - -	1 17 10		Senegal - -	2 17 1	
			Windward Coast	309 16 7		Goree - -	7 9 6		Dakar - -	1 0 6	
			Leeward Coast -	212 6 6		Dakar - -	0 4 0		Goree - -	18 16 10	
			America - -	649 3 10		Rufisque -	1 0 0		Windward Coast	119 0 8	
						Windward Coast	26 10 6		Leeward Coast -	14 16 2	
						Leeward Coast -	14 1 6		Liberia - -	0 5 0	
						Liberia	3 6 0		America - -	542 19 5	
						America - -	704 1 4				
			Total -	18,667 16 7		Total -	15,630 18 7		Total -	18,109 8 5	
61	Sugar, refined - -	2,355 9 1	France -	400 3 2	1,901 13 0	France - -	320 13 9	2,002 12 5	France - -	200 15 2	British sugar still commands the market; that from America comes next in demand. There is, however, a growing trade in foreign sugar from Germany, which, although quite inferior in quality, is very cheap, being 10s per cwt. against 18s. to 20s. per cwt. from Great Britain. Presently, the importation of German cube sugar is about 25 per cent. of total imports from all countries.
			Germany -	2 0 0		Germany -	32 0 0		Germany -	84 9 4	
			America -	173 11 5		Goree - -	0 17 3		Senegal - -	1 4 6	
						Senegal - -	0 3 0		Goree - -	1 14 3	
						Dakar - -	0 2 0		Windward Coast	79 9 1	
						Windward Coast	17 0 5		Leeward Coast -	8 6 3	
						Leeward Coast -	0 12 0		America -	209 0 10	
						America -	489 7 11				
			Total -	575 14 7		Total -	860 16 4		Total - -	579 19 5	

No.	Commodity.	1884. Total Value of Importation.	1884. Value of Importation from Foreign Countries. Countries.	1884. Value.	1889. Total Value of Importation.	1889. Value of Importation from Foreign Countries. Countries.	1889. Value.	1894. Total Value of Importation.	1894. Value of Importation from Foreign Countries. Countries.	1894. Value.	Remarks.
63	Umbrellas and parasols.	£ s. d. —	—	£ s. d. —	£ s. d. 1,244 13 10	France - -	£ s. d. 63 19 8	£ s. d. 2,728 15 5	Germany -	£ s. d. 36 19 1	The foreign importation under this head consists mainly of ladies' fancy parasols and sunshades. Foreign umbrellas do not influence those from Great Britain to any appreciable extent.
						Leeward Coast -	3 12 0		Dakar - -	66 19 5	
									Windward Coast	146 16 4	
									Leeward Coast -	5 12 6	
64	Wood and timber, manufactured :—					Total -	67 11 3		Total - -	256 7 4	
	Staves and empty casks and unenumerated.	6,972 2 7	Denmark -	28 12 5	4,315 15 10	France - -	69 13 10	7,711 3 0	France - -	171 11 1	The trade in lumber, which is included under this head, is exclusively American, being nine-tenths of total imports. The remaining one-tenth represents casks and shooks from Great Britain.
			Windward Coast	25 0 0		Windward Coast	24 10 0		Germany -	152 2 10	
			Leeward Coast -	13 3 0		America	2,831 5 1		Goree - -	0 13 7	
			America -	5,933 16 10					Bulama - -	1 10 0	
									Bisao - -	1 4 0	
									Windward Coast	489 8 3	
									Leeward Coast -	43 4 0	
									America -	5,743 9 1	
			Total -	6,000 12 3		Total - -	2,925 8 11		Total - -	6,603 2 10	
67	Woollen and worsted manufactures :— (a), (b), (c), (d), (e), and (g), woollen tissues, &c.	—	—	—	—	—	—	10,482 8 0	France - -	14 4 5	Foreign competition in these heads is from France and Germany, where articles of apparently the same quality are manufactured, and are on importation here sold at a cheaper rate.
									Germany -	637 18 11	
									Grand Canary -	6 12 4	
									Senegal -	0 10 0	
									Windward Coast	299 12 5	
									Leeward Coast -	84 19 0	
									Total -	1,033 12 1	
—	Cotton cards - -	616 14 6	Windward Coast	1 5 0	319 10 7	America -	319 10 7	471 1 5	Windward Coast	3 15 0	Entirely from America. Not in list of imports. Much used in the interior for carding cotton of native growth.
			America - -	615 9 6					America -	388 14 11	
			Total -	616 14 6					Total -	392 9 11	

Custom House, Sierra Leone,
February 20, 1896.

C. W. EDWIN,
Acting Collector of Customs.

General Observations.

Apart from such articles as flour, unmanufactured tobacco, lumber from America, and gunpowder, spirits, Geneva and rum, from Germany, which are specially produced in these countries, the chief cause of foreign competition in some other importations is evidently cheapness, combined with apparent sameness in quality, by which the merchant is induced to seek the foreign market.

It is noticeable that the foreign merchants in the Colony are zealously engaged in introducing merchandise so made in their own countries as to be scarcely distinguishable from the British manufacture of the same kind, samples of the latter having been first procured in the Colony and sent for that purpose. Such goods, when made and imported, are sold in the Colony at cheaper rates.

The British merchants in the Chamber of Commerce in the Colony should be able to select patterns and samples of the class of goods so competed for and imitated by foreign nations to the prejudice of the British trade.

Besides the specialities of Germany and America, the chief articles of foreign competition are: candles, glassware, hardware and cutlery, nails, sword blades and matchets, sugar, refined, cotton and woollen goods, millinery and hats of all kinds.

I fully concur in the observations offered by the District Commissioner of Sherbro* with respect to paragraph 7, and would only include cocoa nuts in the list of exportable products which he has submitted.

C. W. Edwin,
Acting Collector of Customs.

Custom House, Sierra Leone,
20th February, 1896.

Enclosure 3 in No. 13.

Sierra Leone Chamber of Commerce.

The Chamber, Freetown, Sierra Leone.
16th March, 1896.

Sir,

With reference to your communication on the question of trade within the British Empire, I have the honour by direction to forward to you the opinions of the Chamber of Commerce on the subject, which, I trust, at your earliest convenience, will be laid before His Excellency the Governor for transmission to the Right Honourable the Secretary of State for the Colonies.

2. I beg to hand to you a sample of the cotton cards mentioned in our Report.

3. I also beg to return the following records, which have been placed at our disposal by you, for dealing with this question:—

(1.) Comparative return of all articles of the value of 500*l.* and upwards imported into the Colony of Sierra Leone in 1884, 1889, and 1894.
(2.) Return of reasons.
(3.) Despatch, dated 28th November 1895.

I have, &c.
Norman Roberts, Secretary.

The Hon. Col. J. C. Gore,
Colonial Secretary.

Sierra Leone Chamber of Commerce.

The Question of Trade with the United Kingdom.

The Chamber of Commerce respectfully submits, for the consideration of the Right Honourable the Secretary of State for the Colonies, its opinions on the above subject, as follows:—

Commodity.	Observation.
3. Apparel.	Articles of clothing imported from Great Britain are more suitable for this Colony than those from foreign countries.
4. (*b*) Gunpowder.	With reference to this article, the Chamber coincides with the views expressed by the Acting Collector of Customs in his "Return of Reasons"
6. Beer and ale	Lager beer made in England is preferred to that made and exported direct from Germany, though the latter is cheaper.

* Not printed.

SIERRA LEONE.

Commodity.	Observation.
7. Biscuits and bread - -	With reference to these articles the Acting Collector of Customs' statement is, in effect, correct. But the reason why American bread is cheaper is owing to lower freights paid for shipments made in sailing vessels direct from the United States to this Colony.
11. Candles - - -	On this head the Acting Collector of Customs' statement is, in effect, correct. But there are two reasons to be urged in support thereof, viz. :— (*a*.) Germany and France receive, respectively, a large importation of oil seeds, such as palm kernels, ground nuts, and benni seeds. (*b*). The cost of production in the labour market is cheaper than in Great Britain. Therefore they can favourably compete with British manufactured candles.
14. Cement - - -	With reference to these heads, the Chamber coincides with the views expressed by the Acting Collector of Customs respecting each of them in his "Return of Reasons."
20. Cordage - - -	
21 (*b*) Flour - - -	The American flour is preferred only because it is cheaper. If British flour could be sold here at the same price, there would be little or no demand for American flour.
26. Furniture - -	With reference to these heads, the Chamber coincides with the views expressed by the Acting Collector of Customs, respecting each of them in his "Return of Reasons."
27. Glass (*a*, *b*, *c*, *d*), plates, &c.	
29. Haberdashery and millinery -	
30. Hardware and cutlery -	
31. Hats of all kinds. - -	
34. Leather: (*b*) Wrought, boots and shoes	
39. Medicines - - -	
41. Musical instruments -	
[43.] Oil, kerosine - -	
49. Provisions - -	
54. Silk manufactures - -	
57. Spirits - -	
61. Refined sugar - -	
63. Umbrellas and parasols -	
64. Wood and timber manufactured—staves and empty casks.	
67. Woollen and worsted manufactures.	
Cotton Cards - - -	A sample of Cotton Card is forwarded.

GENERAL OBSERVATIONS.

The Chamber begs to point out the fact that in Sierra Leone British manufactures at present command the market and a higher standard of valuation than foreign manufactures.

The former articles are for quality and finish the best in the market, and preferable to the latter. But (as will be seen from the Acting Collector of Customs' returns, which have been kindly furnished the Chamber) the foreign manufactures are increasing, and if unchecked, will displace a considerable portion of British manufactured goods.

2. The chief reason why it is feared British manufactures will not continue to command the market of Sierra Leone is the similarity of pattern and the cheapness of

the foreign articles. Every European mail packet brings samples, patterns, and specimens of goods manufactured and forwarded direct from foreign countries, of which Germany is conspicuous. These samples are, as a rule, well got up, apparently regardless of expense, and, recently, they have been reckoned at 2 to 1 against the British.

3. The statement of the Acting Collector of Customs in paragraph 2 of his "General Observations" is correct. But the practice of sending to foreign countries patterns of goods of higher manufacture with the object of securing their cheaper production is not a fit subject for imitation; when, unless the conditions of the English labour market were different from what they are at present, the tendency of the practice would be the reduction of the quality and finish of British manufactures below those of other countries so as to equalise the cost of production. In this regard the Chamber is of opinion that the problem which Mr. Secretary Chamberlain will have to enquire into will be, How may British labour successfully compete with foreign?

4. The remarks of the District Commissioner of Sherbro are, so far as they are the result of experience, acceptable, and a trial should be made of such products mentioned in his Report.

5. The Chamber further begs to offer its sincere thanks to his Excellency the Governor for the kind permission granted for the Chamber to use the returns furnished the Government by the Customs.

Thos. S. Buckley,
President.

The Chamber, Freetown, Sierra Leone,
14th March, 1896.

Norman Roberts,
Secretary.

LAGOS.

No. 14.

Sir G. T. CARTER to Mr. CHAMBERLAIN.

(Received June 29, 1896.)

Government House, Lagos,
May 29, 1896.

Sir,

In reply to your Circular Despatch of 28th November last, I have the honour to transmit herewith Returns for the years 1884, 1889, and 1894, showing the Imports into the Colony of Lagos and value when above 500*l.*, also value of importation from Foreign Countries when such value was 5 per cent. or upwards of total value.

2. These Returns have been carefully prepared by Mr. R. R. Gace, the Acting Collector of Customs, who forwards with them a report accompanied by a statement giving the reasons for importation of articles of foreign manufacture in preference to those produced in the United Kingdom. Copies of these documents are enclosed.

3. Samples have been acquired and sent as directed, notification being made in red ink of such articles as have been selected for this purpose.

4. Mr. Gace's reports are so clear and comprehensive that any further remarks from me would be superfluous.

I have, &c.,
G. T. CARTER,
Governor.

Enclosure 1 in No. 14.

RETURN of IMPORTS into the COLONY of LAGOS showing TOTAL VALUE of IMPORTATION when above 500*l.*, and VALUE of IMPORTATION from FOREIGN COUNTRIES when such VALUE was 5 per cent. or upwards of TOTAL VALUE.

No.	Commodity.	1884.			1889.			1894.		
		Total Value of Importation.	Value of Importation from Foreign Countries.		Total Value of Importation.	Value of Importation from Foreign Countries.		Total Value of Importation.	Value of Importation from Foreign Countries.	
			Countries.	Value.		Countries.	Value.		Countries.	Value.
		£ s. d.		£ s. d.	£ s. d.		£ s. d.	£ s. d.		£ s. d.
3	Apparel and slops	1,781 0 0	(*a*) Germany (*b*) Brazil (*c*) France (including Porto Novo).	307 0 0 18 0 0 9 0 0	2,415 0 0	(*a*) Germany (*b*) France (including Porto Novo).	373 0 0 153 0 0	3,690 0 0	(*a*) Germany (*b*) Porto Novo and Kotonou. (*c*) Brazil	388 0 0 27 0 0 2 0 0
			Total	334 0 0		Total	526 0 0		Total	417 0 0
4	Arms and Ammunition :— (*a*) Firearms (small)	2,376 0 0	(*a*) Germany (*b*) Porto Novo	198 0 0 46 0 0	2,995 0 0	(*a*) Germany (*b*) France (including Porto Novo).	380 0 0 301 0 0	2,134 0 0	(*a*) Germany	1,535 0 0
			Total	244 0 0		Total	681 0 0			
	(*b*) Gunpowder	5,966 0 0	(*a*) France (including Porto Novo). (*b*) Germany	2,310 0 0 562 0 0	3,899 0 0	(*a*) Germany (*b*) France (including Porto Novo).	250 0 0 2,892 0 0	5,609 0 0	(*a*) Germany	5,008 0 0
			Total	2,872 0 0		Total	3,142 0 0			
	(*c*) Of all other kinds	1,344 0 0	(*a*) France (including Porto Novo). (*b*) Germany	612 0 0 60 0 0	1,020 0 0	(*a*) Germany (*b*) Porto Novo	301 0 0 9 0 0	2,533 0 0	(*a*) Germany	800 0 0
			Total	672 0 0		Total	310 0 0			
5	Bags, empty	1,239 0 0	(*a*) Germany	971 0 0	992 0 0	(*a*) Germany	463 0 0	1,478 0 0	(*a*) Germany (*b*) Porto Novo	661 0 0 4 0 0
									Total	665 0 0

6	Beer and ale	1,940 0 0	(a) Germany	1,393 0 0	1,707 0 0	(a) Germany (b) France Total	1,480 0 0 6 0 0 1,486 0 0	1,591 0 0	(a) Germany	990 0 0
7	Biscuit and bread	—	—	—	1,084 0 0	(a) Germany (b) Porto Novo (c) Teneriffe Total	56 0 0 2 0 0 1 0 0 59 0 0	—	—	—
10	Butter	543 0 0	(a) Germany	150 0 0	—	—	—	—	—	—
18	Clocks and watches	—	—	—	—	—	—	560 0 0	(a) Germany (b) Porto Novo Total	134 0 0 5 0 0 139 0 0
19	Coals, &c. :—(a) Coals, cinders, and patent fuel.	974 0 0	(a) Germany	525 0 0	—	—	—	2,745 0 0	(a) Germany	1,556 0 0
20	Cordage and twine	2,681 0 0	(a) Germany (b) France (including Porto Novo). Total	839 0 0 17 0 0 856 0 0	2,646 0 0	(a) Germany (b) Porto Novo Total	561 0 0 9 0 0 570 0 0	5,057 0 0	(a) Germany	2,417 0 0
21	Corn :—(b) Wheat flour	1,280 0 0	(a) United States (b) France (including Porto Novo). (c) Germany Total	135 0 0 28 0 0 19 0 0 182 0 0	1,899 0 0	(a) Germany (b) France (including Porto Novo). Total	120 0 0 9 0 0 129 0 0	—	—	—
23	Cotton manufactures	—	—	—	—	—	—	298,506 0 0	(a) Germany (b) Porto Novo (c) Brasil Total	84,315 0 0 242 0 0 6 0 0 84,563 0 0
23a	Cutlery	—	—	—	528 0 0	(a) Germany	57 0 0	751 0 0	(a) Germany	59 0 0

No.	Commodity.	1884.			1889.			1894.		
		Total Value of Importation.	Value of Importation from Foreign Countries.		Total Value of Importation.	Value of Importation from Foreign Countries.		Total Value of Importation.	Value of Importation from Foreign Countries.	
			Countries.	Value.		Countries.	Value.		Countries.	Value.
26	Furniture, cabinet and upholstery ware.	£ s. d. —	- - -	£ s. d. —	£ s. d. 1,881 0 0	(a) Germany - -	£ s. d. 471 0 0	£ s. d. 3,426 0 0	(a) Germany - -	£ s. d. 362 0 0
						(b) Grand Canary -	4 0 0		(b) Porto Novo -	28 0 0
						(c) Madeira - -	3 0 0		(c) Brazil - -	2 0 0
						Total - -	478 0 0		Total - -	392 0 0
27	Glassware - - -	1,111 0 0	(a) Germany - -	285 0 0	786 0 0	(a) Germany - -	291 0 0	1,446 0 0	(a) Germany - -	416 0 0
			(b) France (including Porto Novo).	13 0 0		(b) Porto Novo -	6 0 0		(b) Porto Novo -	6 0 0
			(c) United States -	2 0 0		(c) Brazil - -	4 0 0		(c) Brazil - -	2 0 0
						(d) Madeira - -	3 0 0			
			Total - -	300 0 0		Total - -	304 0 0		Total - -	424 0 0
29	Haberdashery and millinery -	—	- - -	—	—	- - - -	—	19,615 0 0	(a) France (including Porto Novo).	1,156 0 0
									(b) Germany -	405 0 0
									(c) Grand Canary -	227 0 0
									(d) Madeira - -	17 0 0
									Total - -	1,805 0 0
30	Hardware - - -	11,205 0 0	(a) Germany - -	489 0 0	3,813 0 0	(a) Germany - -	623 0 0	14,514 0 0	(a) Germany - -	1,617 0 0
			(b) France (including Porto Novo).	56 0 0		(b) France - -	27 0 0		(b) Porto Novo -	5 0 0
			(c) Brazil -	31 0 0		(c) Brazil - -	6 0 0		(c) Brazil - -	7 0 0
			Total -	576 0 0		Total - -	656 0 0		Total - -	1,629 0 0
31	Hats of all sorts - - -	—	- - -	—	1,165 0 0	(a) Germany - -	217 0 0	2,871 9 0	(a) Germany - -	430 0 0
						(b) France (including Porto Novo).	91 0 0		(b) Porto Novo -	429 0 0
						Total - -	308 0 0		Total - -	859 0 0

32	Implements and tools of industry	2,232 0 0	(a) Germany - -	1,451 0 0	1,421 0 0	(a) Germany - -	706 0 0	2,157 0 0	(a) Germany - -	580 0 0
			(b) France (including Porto Novo).	21 0 0		(b) France (including Porto Novo).	18 0 0		(b) Porto Novo -	10 0 0
			Total - -	1,472 0 0		Total - -	724 0 0		Total - -	590 0 0
33a	Lampware - - -	—	- - -	—	—	- - -	—	1,468 0 0	(a) Germany - -	274 0 0
									(b) Brazil - -	2 0 0
									(c) Porto Novo -	1 0 0
									Total - -	277 0 0
34	Leather:	—	- - -	—	684 0 0	(a) France (including Porto Novo).	73 0 0	1,291 0 0	(a) Madeira - -	58 0 0
	(a) Wrought, boots and shoes					(b) Madeira - -	73 0 0		(b) Germany - -	32 0 0
						(c) Germany - -	43 0 0		(c) Porto Novo -	11 0 0
									(d) Brazil - -	2 0 0
						Total - -	189 0 0		Total - -	103 0 0
37	Machinery - - -	574 0 0	(a) Germany - -	130 0 0	629 0 0	(a) Germany - -	174 0 0	1,829 0 0	(a) Germany - -	665 0 0
						(b) France (including Porto Novo).	25 0 0		(b) Porto Novo -	71 0 0
									(c) Brazil - -	6 0 0
						Total - -	199 0 0		Total - -	742 0 0
39	Medicines - - -	742 0 0	(a) United States -	17 0 0	1,142 0 0	(a) Germany - -	52 0 0			
			(b) Germany - -	14 0 0		(b) Brazil - -	9 0 0			
			(c) Brazil - -	12 0 0		(c) Porto Novo - -	8 0 0			
			(d) France (including Porto Novo).	11 0 0		(d) Grand Canary -	1 0 0			
			Total - -	54 0 0		Total - -	70 0 0			
40	Metals:									
	(a) Iron:									
	(f) Hoops - -	1,554 0 0	(a) France (including Porto Novo).	286 0 0	1,324 0 0	(a) Germany - -	250 0 0	1,129 0 0	(a) Germany - -	341 0 0
			(b) Germany - -	104 0 0		(b) France (including Porto Novo).	168 0 0			
			Total -	390 0 0		Total - -	418 0 0			
41	Musical instruments - -	—	- - -	—	—	- - -	—	758 0 0	(a) Germany -	172 0 0
									(b) Porto Novo -	28 0 0
									Total - -	200 0 0

No.	Commodity.	1884. Total Value of Importation.	1884. Value of Importation from Foreign Countries. Countries.	1884. Value.	1889. Total Value of Importation.	1889. Value of Importation from Foreign Countries. Countries.	1889. Value.	1894. Total Value of Importation.	1894. Value of Importation from Foreign Countries. Countries.	1894. Value.
		£ s. d.		£ s. d.	£ s. d.		£ s. d.	£ s. d.		£ s. d.
44	Painters' colours and materials	—	- - -	—	—	- - -	—	1,327 0 0	(a) Germany - -	494 0 0
49	Provisions, not otherwise described.	3,694 0 0	(a) Germany - -	656 0 0	8,514 0 0	(a) Germany - -	1,052 0 0	18,451 0 0	(a) Germany - -	2,499 0 0
			(b) Brazil - -	455 0 0		(b) Brazil - -	627 0 0		(b) France (including Porto Novo, Goree, and Dakar).	258 0 0
			(c) France (including Porto Novo).	149 0 0		(c) France (including Porto Novo).	309 0 0			
			(d) Madeira - -	80 0 0		(d) Grand Canary -	193 0 0		(c) Grand Canary -	84 0 0
			(e) United States -	55 0 0		(e) Madeira - -	61 0 0		(d) Brazil - -	32 0 0
			(f) Grand Canary -	12 0 0					(e) Teneriffe - -	11 0 0
									(f) Madeira - -	8 0 0
			Total - -	1,407 0 0		Total -	2,172 0 0		Total - -	2,892 0 0
51	Salt - - - -	6,614 0 0	(a) Germany - -	4,205 0 0	7,197 0 0	(a) Germany - -	3,174 0 0	9,459 0 0	(a) Germany - -	3,416 0 0
			(b) France - -	47 0 0		(b) France - -	150 0 0			
			Total - -	4,252 0 0		Total -	3,324 0 0			
54	Silk manufactures - -	3,452 0 0	(a) Germany - -	241 0 0	1,716 0 0	(a) Germany - -	145 0 0	21,232 0 0	(a) Germany - -	2,445 0 0
			(b) France (including Porto Novo).	29 0 0					(b) Porto Novo -	7 0 0
			(c) Brazil - -	26 0 0					(c) Brazil - -	5 0 0
			Total - -	296 0 0					Total - -	2,457 0 0
56	Soap - - - -	—	- - -	—	706 0 0	(a) France (including Porto Novo).	24 0 0	1,227 0 0	(a) Germany - -	47 0 0
						(b) Germany - -	24 0 0		(b) Porto Novo -	23 0 0
						Total - -	48 0 0		Total - -	70 0 0

57	Spirits :—														
	(a) Brandy - - -	507	0	0	(a) Germany - -	312	0	0	—		- - -	—		—		- - -	—	
	(b) Geneva - - -	102,281	0	0	(a) Germany - -	100,504	0	0	50,095	0	0	(a) Germany - -	48,893	0	0	84,507	0	0	(a) Germany - -	83,138	0	0
					(b) Porto Novo - -	8	0	0				(b) France (including Porto Novo).	879	0	0							
					Total -	100,512	0	0				Total - -	49,772	0	0							
	(c) Rum - - -	22,376	0	0	(a) Germany - -	17,315	0	0	35,311	0	0	(a) Germany - -	33,503	0	0	40,815	0	0	(a) Germany - -	39,221	0	0
					(b) Brazil - -	4,240	0	0				(b) Brazil - -	1,439	0	0				(b) Brazil - -	541	0	0
					(c) France (including Porto Novo).	222	0	0				(c) France (including Porto Novo).	249	0	0				(c) Grand Canary -	521	0	0
					(d) Teneriffe - -	51	0	0											(d) Porto Novo -	38	0	0
					Total - -	21,828	0	0				Total - -	35,191	0	0				Total - -	40,811	0	0
	(d) Whiskey - -	—			- - -	—			507	0	0	(a) Germany - -	126	0	0							
58	Stationery, other than paper -	926	0	0	(a) Germany - -	153	0	0	1,350	0	0	(a) Germany - -	242	0	0	1,741	0	0	(a) Germany - -	165	0	0
					(b) France (including Porto Novo).	25	0	0				(b) France (including Porto Novo).	38	0	0				(b) Porto Novo -	6	0	0
					(c) Madeira - -	9	0	0														
					(d) United States -	5	0	0														
					Total - -	192	0	0				Total - -	280	0	0				Total - -	171	0	0
61	Sugar, refined - - -	1,177	0	0	(a) United States -	66	0	0	1,382	0	0	(a) Germany - -	59	0	0							
					(b) France (including Porto Novo).	34	0	0				(b) France (including Porto Novo).	11	0	0							
					(c) Germany - -	12	0	0														
					Total - -	112	0	0				Total - -	70	0	0							
68	Umbrellas and parasols - -	—			- - -	—			—			- - -	—			884	0	0	(a) Germany - -	100	0	0
68a	Wines - - - - -	2,498	0	0	(a) Germany - -	1,333	0	0	3,091	0	0	(a) Germany - -	1,439	0	0	3,924	0	0	(a) Germany - -	908	0	0
					(b) France (including Goree and Porto Novo).	240	0	0				(b) France (including Porto Novo).	515	0	0				(b) France (including Porto Novo).	780	0	0
					(c) Madeira - -	82	0	0				(c) Madeira - -	189	0	0				(c) Madeira - -	79	0	0
					(d) Teneriffe - -	41	0	0				(d) Canary Islands -	128	0	0				(d) Grand Canary -	53	0	0
					(e) Brazil - -	8	0	0				(e) Brazil - -	47	0	0				(e) Congo - -	22	0	0
												(f) St. Thomas -	2	0	0				(f) Portugal - -	17	0	0
					Total - -	1,704	0	0				Total - -	2,320	0	0				Total - -	1,809	0	0

No.	Commodity.	1884.			1889.			1894.		
		Total Value of Importation.	Value of Importation from Foreign Countries.		Total Value of Importation.	Value of Importation from Foreign Countries.		Total Value of Importation.	Value of Importation from Foreign Countries.	
			Countries.	Value.		Countries.	Value.		Countries.	Value.
		£ s. d.		£ s. d.	£ s. d.		£ s. d.	£ s. d.		£ s. d.
64	Wood and timber, manufactured :—									
	Staves and empty casks unenumerated.	8,848 0 0	(a) France (including Porto Novo).	1,703 0 0	9,438 0 0	(a) Germany - -	2,041 0 0	14,919 0 0	(a) Germany - -	6,118 0 0
			(b) Germany - -	1,353 0 0		(b) France (including Porto Novo).	228 0 0			
			(c) Brazil - -	2 0 0						
			Total - -	3,058 0 0		Total - -	2,269 0 0			
67	Woollen and worsted manufactures.	—	- - -	—	2,098 0 0	(a) Germany - -	631 0 0	5,779 0 0	(a) Germany -	1,107 0 0
						(b) Porto Novo -	3 0 0		(b) Porto Novo -	13 0 0
									(c) Brazil - -	3 0 0
						Total -	634 0 0		Total - -	1,128 0 0

Enclosure 2 in No. 14.

Return of Reasons for Importation of Articles of Foreign Manufacture in preference to those produced in the United Kingdom.

3. Apparel and Slops.—Not imported from foreign countries by English firms. The return of values shows approximately the proportion imported by the German firms in their own steamers from Germany.

4. Arms and Ammunition:—

(*a*) *Firearms* (*small*).—The trade here is in Flint-lock guns, known as Long Danes. A large proportion of those imported come from Germany, the cost, including shipping charges but exclusive of duty, being 8*s*. 7*d*.

These guns are turned out at a very cheap rate, are suitable for purposes of trade, and as there is regular and direct communication with Hamburg, the shipping charges are not in excess of those between Liverpool and Lagos.

(*b*) *Gunpowder*.—The sale in the Colony is restricted by law to what is known as trade powder, and this is almost all manufactured in Germany, where it is turned out at a very cheap rate, the cost to the merchant landed here, but exclusive of duty being 1*l*. 7*s*. 6*d*. per 100 lbs., less 5 per cent. which covers freight.

It is packed in small wooden kegs, generally of 5 lbs. or 10 lbs. weight, and is preferred by the natives because of its bright appearance, which they consider is better than dull or dead-looking powders.

(*c*) *Of all other kinds*.—These consist of gun-flints and bird shot (roughly-made bullets and slugs). The English firms import from the United Kingdom, and the proportion of the quantity annually imported from Germany represents the share of the trade done by German firms, as the trade in arms and ammunition is only undertaken by a limited number of firms.

5. Bags, Empty.—These are not imported for sale to any appreciable extent, but only by the mercantile houses for putting up palm kernels for exportation.

6. Beer and Ale.—The demand for this is generally limited to the European section of the community, but a comparison of the Returns of Values for 1884, 1889, and 1894 shows that the proportion imported from Foreign Countries is decreasing and that from the United Kingdom correspondingly increasing, owing to the lager beer of British manufacture being lighter and more adapted for consumption in a tropical country.

7. Biscuits and Bread.—The demand is limited and it will be noticed that in the Return for 1894 the importations from foreign countries did not amount to 5 per cent. of the total value.

18. Clocks and Watches.—The Return for 1894 shows that 25 per cent. of the total value imported came from Germany, though the probability is that a very much larger proportion of these articles are of foreign manufacture. As a rule, they are such as can be bought for from 10*s*. to 25*s*. each.

19. Coals, Cinders, and Patent Fuel.—There is no market for such here. Wood is used for household purposes. The coal imported is for use on the small steamers and launches which are used in the local carrying trade.

20. Cordage and Twine.—Most of the English firms import from the United Kingdom. It is said that the natives have rather a preference for a particular kind of twine which is made in Germany and has a smooth shiny surface, and while being cheap is also quite suited to the purposes for which it is used.

21. Corn, Wheat Flour.—In 1889 the foreign imports only amounted to about 7 per cent. of the total value, and in 1894 they had fallen to less than 5 per cent. It is only in the town of Lagos that any demand for flour can be said to exist.

23. Cotton Manufactures.—Nearly all cotton goods imported into the Colony are of British manufacture. There is, however, one particular kind which is made in and imported from Germany as well as the United Kingdom. It has what is known as the oil finish, which gives more substance to the material and deepens the colours more nearly to the shades employed by the natives in dyeing the cotton cloths produced on

the coast. The mode of packing, however, cannot be considered as a factor in dealing with the question of preference. The price varies from 3*d.* to 4*d.* per yard, according to quality.

Another description of cotton goods of German manufacture for which there is a market in the Colony and is imported to a considerable extent, is what is known as patent velvet. The price per yard, free of duty, landed here is from 1*s.* 4*d.* to 1*s.* 6*d.*, and it is said that an article of the same quality, finish, and appearance cannot be obtained from manufacturers in the United Kingdom at this price.

23A. CUTLERY.—Chiefly imported from Liverpool, but not necessarily of English make. A large proportion is said to be made in Germany. Articles such as knives, razors, and scissors of common materials, but well finished in appearance, meet with a ready sale owing to cheapness.

26. FURNITURE, CABINET AND UPHOLSTERY WARES.—There is not much demand for such at present, except for cheap iron bedsteads and Austrian bent-wood chairs and sofas. The greater proportion of the total value of this import, as shown in the return for 1894, is for use in the European mercantile houses.

27. GLASS.—A considerable proportion of the glass imported, though brought from the United Kingdom, is of German manufacture, where it is said the cost of production is less and can consequently be placed on the markets at a cheaper rate. The quality is, as a rule, common, and consists, to a great extent, of coloured glass tumblers, wine glasses, sugar bowls, and jugs.

29. HABERDASHERY AND MILLINERY.—In the return of values for 1894, the proportion shown as an import from "France (including Porto Novo)" is apt to be misleading. In all other cases where it occurs, Porto Novo is the country stated on the bills of entry to be the place from whence imported, but the goods so imported have only been landed there, or rather at Kotonou, by French steamers as a rule, and hence are included under an import from France. In this particular instance the greater part of the import is actually the product or manufacture of the French Colony of Dahomey, being the work of the natives.

A considerable part of the German import consists of beads of various colours and sizes.

30. HARDWARE.—The English firms import chiefly from the United Kingdom. From Germany, however, there are imported in considerable quantities enamelled iron goods, such as cups, plates, dishes, basins, &c., which can be obtained at a cheaper rate than similar articles made in the United Kingdom, and owing to their being well got up, and to the existence of a demand for such things, sell readily.

31. HATS OF ALL SORTS.—Those imported from Germany are mostly of soft grey felt. The English firms, however, import from the United Kingdom. Those shown in the Return for 1894 as being imported from Porto Novo are of native manufacture and finely plaited of a very soft and pliable grass which is indigenous to the country.

32. IMPLEMENTS AND TOOLS OF INDUSTRY.—These consist almost exclusively of matchets and bill-hooks, and are all made in Germany. The price, which is from 3*s.* to 3*s.* 2*d.* per dozen landed here, being so low is probably the reason why British manufacturers have never attempted to compete, although, as the Returns show, there is a considerable market for them. They are made of the commonest description of iron apparently, with a rough wooden handle rivetted on.

33A. LAMPWARE.—The return of values for 1894 is no index of the proportion of foreign manufacture, for the greater part of the lamps classed in the Import Book as coming from the United Kingdom, are in reality of German manufacture, such as are sold so largely in Great Britain owing to the cheap prices.

34. LEATHER.—(*b*) *Wrought, boots and shoes.*—From Madeira a considerable quantity of white canvas shoes are imported, as these are suitable for the climate and they are a speciality in Madeira. All other descriptions of boots and shoes are almost entirely from the United Kingdom and are of English make.

37. MACHINERY.—There is no demand for any description of machinery. Such as is imported is for use in the various mercantile establishments.

40. Metals:—

a. Iron.

(*f*) *Hoops.*—These are not imported for sale but to make up the casks for exporting oil and rubber.

41. Musical Instruments.—From Germany are imported a considerable number of cheap musical boxes. Other instruments are as a rule imported only by order, as there is so little demand for such here.

44. Painters' Colours and Materials.—A large proportion of the paint imported from Germany is for the private use of the German firms, for their vessels working between the lagoon and the Roads, &c. All the English firms import from the United Kingdom.

49. Provisions, not otherwise described.—The German and English firms import large quantities of tinned provisions, including all kinds of vegetables and fruits; with this exception the imports under this head are brought from the United Kingdom as a rule.

51. Salt.—On comparing the Returns of values for 1884, 1889, and 1894 it will be noticed that the proportion imported from Germany has fallen from $\frac{2}{3}$rds to less than $\frac{1}{3}$rd. It is said that the formation of the Salt Union has brought this about. The German houses here still do a large trade owing to their being able to import in their own steamers, and because they give large credit for this article to the native traders who act as middlemen.

54. Silk Manufactures.—All the English firms as well as the principal native merchants who import directly, get this article from the United Kingdom, and the value of the importation shown in the Return as coming from Germany may be fairly taken as the proportion of the trade in the hands of the German houses.

56. Soap.—All the soap imported by the English houses and more than 90 per cent. of the total value of the importation comes from the United Kingdom.

57. Spirits:—

(*a*) *Geneva.*—With the exception of the ordinary sweet gin and old tom, this all comes from Hamburg, where it is manufactured in bond solely for exportation, and costs exclusive of duty and freight about 2*s.* 6*d.* per case of 12 bottles.

(*b*) *Rum.*—In the Return of values for 1894 it will be seen that more than 75 per cent. comes from Germany. A large part of this is imported in demijohns varying from $\frac{15}{16}$ to $1\frac{63}{64}$ gallons and from 20 per cent. to 35 per cent. under proof by Sykes' hydrometer. The remainder is imported in puncheons, pipes, hogsheads and barrels, and is entered as alcohol, which on being tested is generally found to be between 55 per cent. and 63 per cent. over proof. The spirit imported from Brazil and Grand Canary, which is imported as Havannah rum is generally between 15 per cent. and 25 per cent. under proof. The invoiced cost to the importer, exclusive of shipping charges, is for alcohol between 5*l.* 2*s.* to 5*l.* 17*s.* per puncheon and for rum from 3*l.* 1*s.* to 3*l.* 6*s.* per puncheon.

58. Stationery.—The demand is limited to the town of Lagos, practically speaking, and considering the proportion of the trade in the hands of the German firms, the importation from Germany cannot be regarded as excessive. All the English firms import from the United Kingdom.

63. Wines.—On comparing the Returns of Values for 1884, 1889, and 1894, it will be noticed that the proportion of the import from Germany has steadily decreased, and the Blue Book Returns for 1895 show that this is maintained. It would seem, therefore, that the trade in German wines is passing through the United Kingdom, who supply importers in this Colony. The value of the import shown as coming from France and Porto Novo is considerable, but it must be borne in mind that Porto Novo or rather Kotonou, which is its port, is in direct communication with Bordeaux, and Marseilles, and the wine so imported is of the so-called Vin Ordinaire description.

64. Wood and Timber manufactured.—*Staves and empty Casks unenumerated.*—These are imported by the mercantile houses for their own use for the exportation of rubber and palm oil.

67. Woollen and Worsted Manufactures.—Wools used for knitting, crochetting, and fancy work are nearly all imported from Germany, as the kind which sells

Lagos.

here, though poorer in quality than that made in the United Kingdom, cannot be obtained as cheaply and as well finished as the article obtained in Germany. Care is also said to be used in packing to give each bundle a bulky appearance. The price to the importer, inclusive of freight, but not including duty, is from 5*s.* 3*d.* to 5*s.* 9*d.* per bundle of 12 packets of each two hanks.

Annexure to No. 14.

Sir, Custom House, Lagos, 14 May 1896.

In forwarding the enclosed Return of Imports for 1884, 1889, and 1894, showing what proportion of the various articles were of foreign origin when the total value of such articles amounted to 500*l.* and upwards, I have the honour to state that in some cases it would seem superfluous to discuss the reasons why 5 per cent. or more of the total value of an import should be of German origin, since it is to be remembered that nearly a moiety of the trade of the Colony is in the hands of the two large German firms here, which naturally import goods of German manufacture where they are found suitable for trading purposes, and compete on equal terms, owing to cost and finish, with similar articles of English make. Another equally cogent reason is that both these firms have their own main line steamers as well as branch boats; so their shipping charges are less than those paid by the English houses for the carriage of their goods from Liverpool.

In the Return for 1889 it will be noticed that a large proportion of the foreign import came from France, while in 1894 this had disappeared. The reason for this is because the French firms which were established here in 1889 had retired from the field in 1894.

In the report showing the prices, &c. of articles of foreign manufacture I have in many cases not dealt with the differences in quality, finish, making up, or packing, as I am credibly informed that the only reason why such articles are imported by English firms is because the class of goods cannot be obtained in England for the same price.

In 1894 the total value of lamps imported into the Colony amounted to 1,468*l.*, and as there seemed to be no proper heading under which they could be classed, I have made a separate one and numbered it 33A.

The demand for articles of European manufacture amongst the native population is limited to a few articles such as guns, gunpowder, tobacco, salt, spirits, and cotton goods, generally speaking, and with the exception of gunpowder and spirits, Great Britain is the country of origin from which by far the greater proportion comes.

I have, &c.,

Reginald R. Gace,
Acting Collector of Customs.

Gambia.

GAMBIA.

No. 15.

Administrator LLEWELYN to Mr. CHAMBERLAIN.

(Received November 19, 1896.)*

Government House, Bathurst, Gambia,
Sir, April 11, 1896.*

I have the honour to acknowledge the receipt of your despatch, dated the 28th of November 1895, which I regret I have not been able to reply to earlier, but the information called for has taken time to collect, and I have been absent from head quarters, travelling through the Protectorate, during the greater part of February and March.

* This despatch was detained by the Administrator pending his arrival in England on leave.

2. Mr. Griffith, Treasurer and Acting Collector of Customs, prepared for me the accompanying Returns for the three years, 1884, 1889 and 1894, which, I trust, are what are required, and I asked the heads of the principal firms in business here to attend at Government House on the 2nd inst. to discuss those Returns and enable me to reply generally to your despatch.

3. Owing to indisposition and other causes, only Mr. Goddard, M. Guirand, and Mr. Forster were able to come with Mr. Griffith, but I consider the information given by those gentlemen to be the best obtainable.

4. The conditions of business in the Gambia are perhaps exceptional. Of the four principal firms only one is English and the rest are French. All the staple product goes to France, but the imports nearly all come from England, *i.e.*, as far as the articles that are required are manufactured in England.

5. The only exceptions are in cases where, (1) owing to the French firms owning their own vessels, freights are given to them of such heavy articles as those on which the saving of freight makes up the difference in the higher first cost price of the article in France; and (2) the following articles, Rouen yarns, soap, and loaf sugar.

6. With the trade nearly entirely in the hands of the French firms, it is satisfactory to notice that the business with England is as large as it apparently is, and I believe that in the case of the three articles referred to it is a question of "fancy" more than of quality or price, but I am sending samples of those articles to London as directed, for there is apparently no reason why the soap and loaf sugar should not be put up if manufacturers wish it, to suit the fancy of the consumers.

7. I append a Report as required by paragraph four of your despatch, prepared by Mr. Griffith, on each of the articles referred to in the Returns of Imports.

* * * * *

I have, &c.,
R. B. LLEWELYN,
Administrator.

Enclosure 1 in No. 15.

RETURN showing VALUE of ARTICLES imported from FOREIGN COUNTRIES where the Value exceeds 5 per cent of the Total Importations during the Years 1884, 1889, and 1894.

No. on List.	Commodity.	Total Value of Importations.			Value of Importations from Foreign Countries.			
		1884.	1889.	1894.	Country.	1884.	1889.	1894.
		£	£	£		£	£	£
3	Apparel and slops -	1,261	747	1,847	France -	372	228	317
5	Bags, empty - -	1,477	1,949	1,658	France - -	292	538	505
—	Beads - - -	2,991	1,118	899	France - -	1,168	709	306
6	Beer and ale :—							
	Ale and porter -	890	519	816	France - -	99	37	47
					Germany - -	—	113	—
					Total - -	99	150	47
7	Biscuit and bread :—							
	Bread - -	505	547	1,447	France - -	145	204	59
					United States - -	127	—	—
					Total - -	272	204	59

GAMBIA.

No. on List.	Commodity.	Total Value of Importations.			Value of Importations from Foreign Countries.			
		1884.	1889.	1894.	Country.	1884.	1889.	1894.
		£	£	£		£	£	£
20	Cordage	1,187	686	963	France	795	356	318
					United States	112	—	—
					Total	907	356	318
23	Cotton manufactures:— Cotton goods	51,552	35,857	26,139	France	5,658	4,358	3,502
29	Haberdashery	3,739	2,509	2,208	France	438	272	495
30	(*a*) Hardware	4,160	2,311	3,039	France	1,149	621	713
34	Leather:— (*b*) Wrought, boots and shoes.	697	—	525	France	296	—	201
43	Oil, ground nut	1,507	771	1,518	France	1,349	639	1,327
49	Provisions	2,401	1,313	2,342	France	1,179	469	506
—	Rice	13,703	9,849	23,508	France	1,919	909	4,750
51	Salt, refined and rock	818	750	1,594	France	817	481	655
					Cape Verde Islands	—	269	925
					Total	817	750	1,580
56	Soap	1,645	1,170	1,291	France	1,425	785	923
57	Spirits:— (*a*) Cordials	678	520	617	France	626	410	436
					Germany	—	52	—
					Total	626	462	436
	(*b*) Geneva	984	828	658	France	456	—	—
					Germany	—	674	559
					Total	456	674	559
	(*c*) Rum	2,186	1,909	1,198	France	1,317	—	—
					Germany	—	673	528
					Total	1,317	673	528
61	Sugar, refined	1,924	1,244	1,560	France	1,323	814	940
63A	Wine, claret	2,929	1,345	1,789	France	2,749	1,279	1,418

No. on List.	Commodity.	Total Value of Importation.			Value of Importations from Foreign Countries.			
		1884.	1889.	1894.	County.	1884.	1889.	1894
		£	£	£		£	£	£
64	Wood and timber:—							
	Manufactured - -	538	869	*See* Lumber.	France - -	538	554	*See* Lumber.
					United States - -	—	293	"
					Total - -	538	847	—
	Lumber - -	1,391	716	677	France - -	89	299	663
					United States - -	1,078	383	—
					Total - -	1,167	682	663
—	Tobacco, unmanufactured.	3,781	8,044	4,392	France - -	515	1,866	—
					Germany - -	—	734	—
					United States - -	2,638	3,702	4,302
					Total - -	3,153	6,302	4,302

Enclosure 2 in No. 15.

REASONS which have induced IMPORTERS in this COLONY to prefer FOREIGN ARTICLES of TRADE to similar GOODS of BRITISH MANUFACTURE, particulars of which are shown on the attached LIST.

(In the attached list of imports it will be observed that France is the only foreign country that in any way attempts to compete with British trade in this Colony. The reason for this, which must be borne in mind in regard to each article reported on, is that three out of the four principal mercantile houses in the Colony are French, having large establishments at Marseilles, with their head African houses established in the French Colony of Senegal, situated about sixty miles from this port, from which their several branch establishments are kept supplied with stock as required. The firms in question are also shipowners—both steam and sailing craft—and are thereby in a position to ship goods at the lowest possible freight rates from Marseilles to be landed at Senegal for distribution, by their sailing craft, amongst the branch factories here and on other parts of the Coast. In many instances the goods landed at Senegal are of English manufacture and shipped from English ports in English bottoms to that Colony. When shipped from Senegal to this Colony, however, they are, in the majority of cases, treated as goods coming from France viâ Senegal. Again it is stated that articles of English manufacture, especially in the case of cotton goods, are often shipped from Manchester, &c., to Marseilles and there shipped in French bottoms to Senegal, thus saving duties as high as 15 per cent. Senegal Colony, so far as this port is concerned, may be considered as a "transit" station. In this return therefore all articles shown in the Colonial statistics as coming from Senegal have gone to swell the importations from France.)

No. on List.	Commodity	Reasons.
3	Apparel and slops - -	The price, quality and suitability for the market are very much the same from France as from Great Britain. The French houses indent from the former country while the English firms and smaller importers obtain their goods from Great Britain. It has not been possible to sub-divide this head under "men's and women's" as suggested in annex 3 to the circular despatch from the Secretary of State.

GAMBIA.

No. on List.	Commodity.	Reasons.
5	Bags, empty	The reason of the value of the imports from France under this head being so high can only be attributed to the fact that the French houses obtain a reduced freight by importing in their own vessels. English-made bags cost about 10½*d.* each, while those coming from France cost about 1*s.* each (invoice price). The quality and suitability are alike. The French houses are the only importers of bags from a foreign country.
—	Beads	Although more than two thirds of the value of this article is shown as coming from France, the article is really manufactured in Italy (Venice) and is shipped from both English and French ports. The price varies according to quality from 2*d.* to 4½*d.* per bunch and from 4*d.* to 1*s.* per lb. (invoice price). There is only a small trade done in English beads.
6	Beer and ale:— Ale and porter	The greater quantity of the total importations shown, as well as those coming from France, may be treated as being in transit from Germany. The difference in the cost of the English and German manufacture of this article is trifling. The light German beers are preferred to the heavier makes of the English market.
7	Bread and biscuit:— Bread	The total import of this article which comes from the United States is not large. Importers from France state that it is cheaper to import viâ Marseilles than Great Britain, where, it is said, the freights and expenses incurred are heavier. It will be seen, however, that the imports viâ France are but trifling. In connection with this item it may be mentioned that the three French houses have the largest, if not the only, bakeries in the Colony.
20	Cordage	Price.—This article is cheaper in the English market than in the French, as the following figures prove. English make— 3-Strand Manilla, 28*s.* 9*d.* per cwt. 3-Strand Hemp, 30*s.* 6*d.* per cwt. French make— 4-Strand Hemp, 31*s.* 3*d.* per cwt. 4-Strand White, 36*s.* per cwt. The manufactures of both countries, however, meet with a ready sale. The French houses are the only importers of the French make, which is said to be of a better quality than the English as they find that the French shipping will only use the French 4-Strand rope.
23	Cotton manufactures:— Cotton goods, including yarns	The greater portion of the importations of this article shown as coming from France are English-made goods and shipped from English ports, either in English bottoms or shipped to Marseilles and then shipped in French bottoms, to this port or to Senegal in transit for here as required by the branch firms. There are certain French goods, however, imported from Marseilles which meet with a local sale. 1. "Rouen yarns" which are of a deeper blue, and of a higher price and better quality than the English make. The English make costing "Grey" 9½*d.* per lb. " " " "Blue" 1*s.* 4*d.* per lb. The French " " "Grey" 10*d.* to 1*s.* per lb. " " " "Blue" 1*s.* 9*d.* per lb. 2. "Rouen Cloth" known as "Sucatoon" and which is also of a better quality and higher price than the English-made cloths.

No. on List.	Commodity.	Reasons.
23	Cotton manufactures :—*cont.* Cotton goods, including yarns—*cont.*	The two items are, however, only imported by the French firms, the English importers stating that they used to import them formerly, but, finding that they sold three to four pieces of the English article in the same time that it took to sell one piece of the French article, ceased to indent from the latter country. Price.—English make, 3*d.* to 4*d.* per yard. Quality said to be very inferior to the French cloth. French make, heavier and deeper dyed 7½*d.* per yard. Invoice prices. P.S.—With reference to item No. 23, "Cotton manufactures" "Cotton goods," the French houses state that they no longer import the Rouen Succatoon cloth, as they find that the cheaper English makes command a better sale.
29	Haberdashery - - -	This includes such a variety of articles that it is almost impossible to separate them for statistical purposes. Only a small portion of this item, however, is imported from France.
30	Hardware - -	Under this head are included nails known in the trade as "Rose" nails. The French nails :— Rose, price 1¾*d.* to 3*d.* per lb., and Wire, „ 1½*d.* to 2*d.* „ are of a better quality and finish than the English makes, and, notwithstanding their higher price, are preferred locally. The native carpenters, who are mostly trained in the French Colony of Senegal, and who therefore are more accustomed to use the French nail, complain that the English nail when used, owing to its make, is more liable to cause the pine boards to split, whereas the French make can be used with safety. Padlocks. French makes command a ready sale. Price 6*d.* to 2*s.* per dozen, as against the English make costing 1*s.* to 4*s.* per dozen. (Invoice prices.) The French make, in addition to being cheaper, is also said to be of a superior quality to that of the English.
34	Leather :— (*b*) Wrought boots and shoes -	A large portion of the importations shown under this head as coming from France, consist of leather slippers or sandals made by the Moors and sold by them in Senegal, from whence they are shipped to this port, costing from 1*s.* 8*d.* to 4*s.* per pair according to quality. As regards French importations, it is stated that the cost of leather as well as the cost of manufacture of boots is less than in England.
43	Oils, ground nut - -	Practically the whole of the importations of this article are shipped from France in French vessels, the nuts from which it is extracted being originally shipped from this port in vessels of all nationalities to Marseilles, where there are large crushing mills. There would not appear to be any mills in England for crushing the ground nut. The oil is preferred by the natives to other oils and is much used for cooking and lighting purposes.
49	Provisions - - -	The importations under this head shown as coming from France are made by the French houses for their own consumption, in addition to a small sale to other Europeans in the colony.
—	Rice - - - -	This is an article imported from India, and may be treated as being in transit both in respect to the English and French markets.

GAMBIA.

No. on List.	Commodity.	Reasons.
51	Salt (rock) - - -	It will be noticed that while nearly the whole of this article comes from either France or the Cape Verde Islands, the importations from the former country are gradually decreasing. The salt which is described as "Rock" is brought over from the islands in schooners during the trading season, November to April. English salt has been imported, but owing to the difficulty experienced in getting a sale for it no shipments are now made to the Colony. It would not appear to suit the market, in addition to which the caravans complained that in transporting it from town to town it is more liable to gall the backs of their animals than the rock salt. The Cape Verde salt which costs 7*d.* to 7½*d.* per bushel is gradually displacing the French salt, which costs 11½*d.* per bushel.
56	Soap - - - -	The greater portion of this article is imported from France. The French soap is put up in boxes of 45 tablets, each weighing 400 grammes, and costs about 18*s.* 3½*d.* the cwt. The trade prefer this article to the English make, owing (1) to the size of the tablet, which is said to be larger than the English, and (2) to the new fresh appearance which it possesses. The principal brand imported from England is "Gossages" Widnes Soap, in cakes weighing from ¼ to ½ lb., and costs, cases included, 17*s.* per cwt. If the cakes were made the same size as the French, viz., 13 ozs., and had the same fresh appearance, it is believed that in addition to being cheaper it would sell better than the French makes.
57	Spirits:— (*a*) Cordials - - -	The spirit trade in this Colony is very small when compared with other West African Colonies. The cordials imported are made in and shipped from France. They are of a very fiery and inferior quality, but possess that "bite" which the seafaring portion of the Colony so much appreciate.
—	*b* Geneva - -	A small quantity of "Old Tom" gin is imported, but more for private use than for trade. The imports generally under this head may be taken as coming, either direct or in transit, from Germany, where it is possible to produce a cheaper and inferior spirit.
—	*c* Rum - - -	The United States and Germany are the only two competitors in the production of this spirit, the imports in transit from the United States being about equal to the imports from Germany.
61	Sugar—refined - - -	About 60 per cent. of the imports of this article come from France. The French article is made up in loaves of 450 grammes, 1 kilo, 2do., 3do., costing about 18*s.* 4*d.* to 19*s.* 6*d.* per cwt., packing and cases included. The consumer prefers the sugar being made up in this manner than in cubes as is done in the English market, and which costs about 18*s.* 6*d.* per cwt., cases included. It is believed that the English article would have a much larger sale if it was made up in the same manner as the French.
63*a*	Wine—claret - - -	This is entirely the produce of France and does not appear to call for any special remark.
64	Wood and timber manufactured:— Lumber.	The imports shown as coming from France are more for the use of one or other of the French houses than for trade. The imports from the United States do not appear to call for any special remark, Great Britain not being a timber-producing country.
—	Tobacco, unmanufactured - -	The total imports under this head may be treated as coming in transit from the United States, and do not call for any report.

H. M. BRANDFORD GRIFFITH.

CAPE OF GOOD HOPE.

No. 16.

Lieut.-Gen. GOODENOUGH to Mr. CHAMBERLAIN.
(Received August 24, 1896.)

Government House, Cape Town,
August 3, 1896.

Sir,

I have the honour to enclose, for your information in reference to your despatch of 28th November last, a copy of a minute from Ministers, transmitting reports and returns furnished by the Collector of Customs on the subject of securing the mutual trade of Great Britain and the Colonies for British producers and manufacturers, and the reasons, if any, for the preference given to certain articles imported from foreign countries.

I have, &c.,
W. H. GOODENOUGH, Lieut.-General,
Administrator and Acting
High Commissioner.

Enclosure in No. 16.

Minute.

From Ministers to Administrator.

Prime Minister's Office, Cape Town,
July 28, 1896.

Minute.

In acknowledging the receipt of His Excellency the Governor and High Commissioner's Minutes of the 18th December 1895 and 27th January 1896, transmitting, for the consideration of Ministers, a despatch from the Right Honourable the Secretary of State for the Colonies, on the subject of the importance of securing as large a share as possible of the mutual trade of the United Kingdom and the Colonies for British producers and manufacturers, whether located in the Colonies or the United Kingdom, Ministers have the honour to enclose for His Excellency's information and for transmission to the Right Honourable the Secretary of State, copies of reports dated 28th January, and 16th July 1896, together with a return of goods of the value of 500*l.* and upwards and of which the value from foreign countries exceeds five per cent. of the total imported into the Colony during the years 1884, 1889, and 1894, received from the Collector of Customs; and, further, a Return showing the reasons why certain articles are imported into this Colony from foreign countries in preference to being imported from Great Britain, together with certain remarks made by the Chamber of Commerce, Cape Town.

Ministers desire to express their regret at the delay which has taken place in preparing these Returns. It has occurred owing to the great trouble experienced in obtaining the information from the Chambers of Commerce throughout the country.

J. Gordon Sprigg.

The Assistant Treasurer,

The return of Imports asked for by the 3rd paragraph of Mr. Chamberlain's despatch, compiled as nearly to his wishes as the statistical information in this Department admits of, is forwarded herewith.

CAPE OF GOOD HOPE.

I may premise by stating that the return is misleading so far as Mr. Chamberlain's object is concerned. It does not pretend to show the importation of foreign as against British products or manufactures. It is a record of goods shipped from British or foreign countries, as shown by the report of the vessel conveying the goods, irrespective of country of origin. On this principle our statistics are framed, and in connection herewith I may refer to page 20 of the report of a "Committee appointed to enquire into the compilation of import and export statistics in the Colonies," forwarded by Lord Knutsford's circular No. 1 of the 5th December 1891, where will be seen—"We "think it may safely be said that the aim should be to show, not the country of "original production, but the commercial transactions that take place in an exchange "of goods between two countries." Any other mode of dealing with imports would be most cumbersome and irritating to the mercantile community. Very often, especially in the soft goods trade, it happens that a case is imported containing the produce of several countries; thus, silk from France, gloves from Austria, and cottons from England, the importer who has purchased the goods in the latter country being himself ignorant of the country of origin.

The figures for 1884, 1889 and 1894, show that there has been a substantial increase in the importation of foreign articles in the decade ending 1894. In 1884 the foreign imports were 9 per cent., in 1889 11 per cent., and in 1894 16 per cent. of the total value of goods imported into this Colony. This may be attributed to some extent to the increased attention which has been paid of late to South Africa by foreign countries, as a probable consumer of their wares, to the large influx of a foreign population who are naturally prepossessed in favour of goods made* in their native lands, to the preference of consignors to ship direct to evade restrictions on transhipments of foreign goods in the United Kingdom necessitated by the Merchandise Marks Act, and to improved direct communication between South Africa and foreign countries, particularly North America and Germany, before which a larger quantity of goods were shown as imports from England, whereas some of them had only been forwarded there for despatch to their ultimate destination.

But even allowing for the increase caused by these improved means of communication, it cannot be denied that the return is misleading as regards country of origin. Take ale and beer, for instance. With the large consumption of German beer in this country, it is absurd to say that in 1884 and 1889 not 5 per cent., and in 1894 only 10 per cent. of the total beer imported was of German manufacture. The same with butter, of which practically none is of English make, that country being an importer of butter for home consumption, it being almost entirely the produce of foreign countries, chiefly Denmark.

In the remarks column of the return I have endeavoured to comply with the requirements of paragraph 4 of the despatch, but as regards price, quality, suitability, packing, &c., I think a reference to the mercantile community will be useful. Sub-heading *e* of this paragraph is, I think, fully met by our Merchandise Marks Act No. 12 of 1888, as amended by Act No. 14 of 1889.

As regards paragraph 7 of the despatch, practically all our exports go to Great Britain with the exception of wine, the bulk of which goes to Germany and Holland, everlasting flowers and dried grasses to Germany, and canned fish to France.

Any increase in the consumption in Great Britain of our products must, I think, be expected rather from more energy on the part of our producers to export more suitable articles, than to a sentimental preference of the British public for products of the British Empire. The consumption of Cape wine might, however, be encouraged in Great Britain, if the British Government could see their way clear to admit it at a lower or preferential rate of duty.

F. W. BURROWES,
Collector.

Customs, 28 January 1896.

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* A large number of Germans are in business in South Africa, some of them connected with German firms, and they naturally push the goods of their own country when suitability and price are equal as compared with British goods.

RETURN of UNDERMENTIONED GOODS, of the value of 500*l.* and upwards, and of which the value from FOREIGN COUNTRIES exceeds five per cent. of the total—imported into the CAPE COLONY during the years 1884, 1889, and 1894.

No.	Commodity.	Total Value of Importation.			Value of Importation from Foreign Countries.				Remarks.
		1884.	1889.	1894.	Country.	1884.	1889.	1894.	
		£	£	£		£	£	£	
6	Beer and ale	—	—	79,077	Germany	—	—	7,895	This is not the proper proportion of foreign manufactured beer imported into this Colony, but only that shown as having been imported from foreign countries; a considerable quantity of German beer is shipped from Great Britain. There is a large demand for German beers in South Africa as most of the British ales are too heavy for a warm climate like this. The large number of Germans resident in South Africa also influences the consumption of the foreign article.
					Holland	—	—	7	
					United States	—	—	18	
					Other Countries	—	—	3	
					Total	—	—	7,923	
9A	Brushes	8,127	14,618	21,437	Belgium	—	—	7	"Brushware." A large quantity of "whisk" brooms, made from a particular reed grown in the United States, are used in this country.
					Germany	40	275	967	
					Holland	—	—	61	
					China	1	—	—	
					United States	3,011	1,909	3,933	
					Other Countries	—	—	2	
					Total	3,052	2,184	4,979	
10	Butter	68,870	—	—	Germany	3,320	—	—	Very little of the British manufactured article is imported into this Colony, Great Britain itself being an importer of butter for home consumption. The Australian article is now coming into the market, and compares favourably in quality and price with Danish butter. The imports from Denmark come *viâ* Great Britain.
					United States	1,523	—	—	
					Total	4,843	—	—	
11	Candles of all sorts	60,295	42,616	—	Belgium	225	—	—	German candles run the British article very close in quality and price.
					Germany	3,074	2,988	—	
					Holland	7	261	—	
					Total	3,306	3,249	—	
12	Caoutchouc, manufactures of.	—	4,475	9,860	Germany	—	54	194	"India-rubber manufactured." The imports of India-rubber manufactures from the United States of America, the only serious competitor, will be chiefly in connection with machinery, consisting of hose, packing, &c.
					Holland	—	—	5	
					United States	—	201	942	
					Other Countries	—	—	1	
					Total	—	255	1,142	
13	Carriages, Waggons, Railway.	2,783	25,646	20,226	Germany	30	—	156	"Carriages and Carts."—There has always been a large demand for American "Spiders" and carriages in this country. They are light, strong, and suitable for our roads, and the British article cannot compete in price or design. American woods are especially suitable for work of this nature.
					Holland	—	—	113	
					United States	497	12,963	11,312	
					Total	527	12,963	11,581	
14	Cement	—	—	43,785	Belgium	—	—	47	German cement has lately been coming into the market. It is stated to be equal in quality to the British article and cheaper. Sailing freights are lower from Hamburg than London, alleged to be caused by the freight ring which is in existence in London.
					Germany	—	—	5,642	
					Holland	—	—	43	
					Total	—	—	5,732	

No.	Commodity.	Total Value of Importation.			Value of Importation from Foreign Countries.				Remarks.
		1884.	1889.	1894.	Country.	1884.	1889.	1894.	
		£	£	£		£	£	£	
15	Cheese - -	—	31,936	40,290	Belgium - -	—	—	7	There has always been a demand for German and Dutch cheeses, which in quality and taste differ from British cheese, and are preferred by a certain section of the community.
					Germany - -	—	513	826	
					Holland - -	—	1,118	1,984	
					United States -	—	3	—	
					Total -	—	1,634	2,817	
16	Chemical Products and Dye Stuffs. (a.) Natural. (b.) Artificial.	68,644	110,152	—	Germany - -	394	1,284	—	"Drugs and Chemicals" and "Dye Stuffs."—In 1894 the imports under this heading were less than 5 per cent. It is hoped they will remain so.
					Walwich Bay -	2	—	—	
					Holland - -	—	14	—	
					United States -	3,707	4,545	—	
					Total -	4,103	5,843	—	
18	Clocks and Watches -	—	21,741	19,993	Germany -	—	287	1,332	Germany and the United States, especially the latter, are keen competitors with Great Britain in this trade. The foreign goods can be produced at very low prices, and for their cost are, I think, often better value than the British article.
					Holland - -	—	—	41	
					Delagoa Bay -	—	—	39	
					United States -	—	891	2,363	
					Other Countries	—	—	41	
					Total -	—	1,178	3,816	
20	Cordage and Twine -	9,001	21,680	16,463	Belgium -	—	4	—	"Cordage."—The importation of cordage from America consists chiefly of Manilla rope, which, it is stated, is of better quality than the British article.
					Germany -	173	—	38	
					Holland - -	—	—	17	
					Norway - -	—	7	—	
					Madagascar -	19	—	—	
					Zanzibar -	—	5	—	
					United States -	1,967	2,968	2,806	
					Other Countries	—	—	3	
					Total -	2,159	2,984	2,364	
24	Earthenware and Chinaware including manufactures of clay.	—	—	70,243	Belgium -	—	—	176	In low class earthenware and crockery Germany runs the British article very close both in finish and price.
					Germany -	—	—	4,516	
					Holland -	—	—	98	
					Norway - -	—	—	47	
					China - -	—	—	22	
					Brazil - -	—	—	20	
					United States -	—	—	110	
					Other Countries	—	—	8	
					Total -	—	—	4,997	
25	Fish - - - (a) Herrings. (b) Of other sorts.	—	17,827	48,104	Belgium - -	—	—	25	"Fish preserved." The fish from Germany consists chiefly of herrings imported for consumption by the German portion of the population. That from America consists chiefly of tinned salmon, oysters and lobsters, the produce of American Fisheries.
					Germany - -	—	153	793	
					Holland - -	—	25	116	
					Portugal - -	—	26	203	
					United States -	—	1,860	2,605	
					Total -	—	3,066	3,742	
26	Furniture, cabinet, and upholstery-wares.	—	184,611	226,027	Belgium - -	—	—	205	A large quantity of Bentwood furniture is imported from and via Germany. In this class of furniture Great Britain does not appear to compete. America sends a large quantity of school furniture and chairs of a light nature. American wood is especially suitable for furniture of this kind.
					Germany - -	—	5,097	12,461	
					Holland - -	—	21	909	
					Sweden - -	—	20	—	
					Other Portuguese Poss. E. Africa.	—	34	—	
					China - -	—	—	297	
					Japan - -	—	—	220	
					United States -	—	11,723	10,719	
					Total -	—	16,895	24,811	
27	Glass - - (a) Plate, rough or silvered. (b) Flint. (d) Of other sorts.	25,476	51,887	91,577	Belgium - -	—	184	1,599	"Glass: Plate and other kinds." The importation of glass from Germany shows a very large increase in 1894. I cannot satisfactorily account for this, but I am informed that the German article runs British glass very close both in quality and price.
					Germany - -	792	2,006	12,325	
					Holland - -	—	—	819	
					Zanzibar -	2	—	—	
					United States -	643	178	1,998	
					Other Countries	—	—	3	
					Total -	1,437	2,368	16,744	

No.	Commodity.	Total Value of Importation.			Value of Importation from Foreign Countries.				Remarks.
		1884.	1889.	1894.	Country.	1884.	1889.	1894.	
		£	£	£		£	£	£	
	(c) Common bottles	—	1,380	3,254	Germany	—	22	1,355	"Spirits, wine, or beer." I can only account for this large increase in the importation of bottles of glass, by assuming that it was caused by some large order placed in Germany on special terms, perhaps.
					Walwich Bay	—	19	—	
					Delagoa Bag	—	13	—	
					Zanzibar	—	9	—	
					Other Countries	—	—	7	
					Total	—	63	1,362	
28	Grease, tallow, and animal fat.	15,139	10,877	17,161	Germany	115	552	—	The importation under this heading from America consists chiefly of antifriction grease of a quality which is especially suitable for use with American vehicles, of which a large number are imported.
					Holland	—	—	149	
					Madagascar	3	—	—	
					West Africa, Native.	—	1	—	
					United States	3,479	2,530	4,876	
					Other Countries	—	—	10	
					Total	3,597	3,083	5,035	
30	Hardware (a) Files. (b) Saws. (c) Edge tools. (d) Engineers' tools.	2,011	18,108	30,031	Belgium	—	—	54	"Tools." I cannot explain the large increase in the importation of tools from Holland. It may be that it is a special lot imported in connected with some industry. The increase in imports from America is, I think, more apparent than real; in 1884 it is probable that imports of American tools came *vid* Great Britain and were shown as the manufacture of that country, whereas, now that direct communication is more often, they come direct. The gold mining industry, in which a large number of tools are used, may also account for the increase, which, however, has not advanced much since 1889.
					Germany	—	53	709	
					Holland	—	—	3,036	
					United States	687	7,038	7,496	
					Other Countries	—	—	4	
					Total	687	7,091	11,299	
32	Implements and tools of industry: (a) Agricultural.	20,759	47,447	80,825	Belgium	—	—	9	"Agricultural implements" from America have always been in favour in this Colony owing to their price, lightness, and ingenuity. This item includes ploughs, of which a very large number of American made ones are used in South Africa.
					Germany	609	517	5,746	
					Holland	—	—	31	
					United States	7,637	26,970	34,558	
					Total	8,246	27,487	40,344	
33	Instruments and apparatus: Surgical, Anatomical	—	—	4,184	Germany	—	—	508	Trifling.
					United States	—	—	59	
					Total	—	—	567	
	Scientific	—	—	7,546	Germany	—	—	703	
					Holland	—	—	5	
					United States	—	—	113	
					Other Countries	—	—	3	
					Total	—	—	824	
34	Leather: (a) Unwrought	8,663	14,658	22,060	Holland	—	—	16	I believe leather was very cheap in America in 1894, and this probably accounts for the large increase under this heading.
					Germany	30	—	139	
					United States	674	2,100	4,886	
					Total	704	2,100	5,041	
	(c) Wrought of other sorts.	—	—	19,380	Germany	—	—	455	
					Holland	—	—	41	
					United States	—	—	682	
					Total	—	—	1,178	

CAPE OF GOOD HOPE.

No.	Commodity.	Total Value of Importation.			Value of Importation from Foreign Countries.				Remarks.
		1884.	1889.	1894.	Country.	1884.	1889.	1894.	
37	Machinery:	£	£	£		£	£	£	
	(a) Agricultural	9,606	15,020	69,649	Germany	—	—	2,117	American agricultural machinery has become very popular in South Africa. The five years ended 1894 show a very large increase. American harvesters and reapers are coming into very general use, and British manufacturers will have to exert themselves to counteract this.
					United States	1,718	1,781	23,464	
					Other Countries	—	—	4	
					Total	1,718	1,781	25,585	
	(b) Mining	—	—	604,980	Germany	—	—	12,320	Considering the large quantity of mining machinery that is being imported into South Africa, it was only to be expected that American ingenuity would capture a certain share of the trade, especially as there are a large number of American engineers on the Randt who would push the goods of their own country. Freight is cheaper from America than from Great Britain, and this is a serious item in the importation of such heavy merchandise as machinery.
					Holland	—	—	2,055	
					United States	—	—	92,565	
					States over Border	—	—	84	
					Total	—	—	107,024	
	(d) All other	13,456	—	121,268	Belgium	—	—	4,989	The imports of "other machinery" includes electrical lighting machinery, and, as a German firm has the contract for lighting the city of Cape Town, this will account for the comparatively large import from that country.
					Germany	165	—	12,110	
					Holland	—	—	4,117	
					United States	1,370	—	6,590	
					Total	1,535	—	27,806	
38	Manure, artificial	—	—	3,980	Germany	—	—	320	Trifling.
					Holland	—	—	50	
					United States	—	—	140	
					Other Countries	—	—	1	
					Total	—	—	511	
41	Musical instruments	18,515	44,367	60,222	Belgium	—	5	94	German pianos are coming very much to the fore in this market. As compared with English pianos, they are marvellous value for the money, and British manufacturers should bestir themselves in this line.
					Germany	742	2,922	16,552	
					Holland	—	47	79	
					United States	443	4,772	3,937	
					Other Countries	—	—	9	
					Total	1,185	7,746	20,671	
44	Painters' colours and materials.	20,043	32,489	51,344	Belgium	—	—	12	"Paints, turpentine, and varnish." Trifling.
					Germany	—	15	740	
					Holland	—	—	411	
					Italy	—	—	21	
					United States	1,547	2,029	2,966	
					Other Countries	—	—	8	
					Total	1,547	2,044	4,158	
47	Pictures	—	—	4,904	Germany	—	—	344	Trifling.
					Holland	—	—	60	
					Other Countries	—	—	2	
					Total	—	—	406	
48	Plate and plated goods.	—	—	27,931	Belgium	—	—	26	Trifling.
	(a) Silverware				Germany	—	—	1,632	
	(b) Plated ware.				Holland	—	—	27	
					United States	—	—	829	
					States over Border	—	—	60	
					Other Countries	—	—	4	
					Total	—	—	2,578	

No.	Commodity.	Total Value of Importation.			Value of Importation from Foreign Countries.				Remarks.
		1884.	1889.	1894.	Country.	1884.	1889.	1894.	
		£	£	£		£	£	£	
49	Provisions, not otherwise described.	—	—	99,061	Germany - -	—	—	1,701	The provisions from the United States include a large quantity of Maizena and other manufactures from products which are largely and cheaply grown in America, and for which the climate of the country is more suitable than that of Great Britain.
					Holland -	—	—	50	
					China - -	—	—	124	
					United States -	—	—	8,585	
					Total -	—	—	10,460	
52	Seeds of all sorts -	—	—	7,998	Germany - -	—	—	188	Trifling.
					Holland -	—	—	9	
					United States -	—	—	214	
					Other Countries	—	—	15	
					Total -	—	—	426	
57	Spirits: Gin -	—	7,066	11,841	Germany - -	—	803	105	Trifling.
					Holland -	—	176	749	
					Total -	—	979	854	
58	Stationery, other than paper.	—	—	186,725	Belgium - -	—	—	128	The foreign imports under this heading can be accounted for to some extent by the fact that a large quantity of stationery is imported by Assurance Companies having their head offices in foreign countries, from whence their supplies are naturally forwarded.
					Germany -	—	—	4,146	
					France - -	—	—	279	
					Holland -	—	—	1,978	
					Canary Islands -	—	—	82	
					China - -	—	—	5	
					United States -	—	—	2,978	
					Other Countries	—	—	12	
					Total -	—	—	9,608	
61	Sugar, refined -	11,801	17,079	45,495	Belgium - -	—	—	20	The so-called "refined sugar" from Germany includes, I think, some white beetroot sugar which has probably been classed in error under this heading. There has always been a demand for American white crushed sugar in barrels.
					Germany -	608	940	5,797	
					Holland - -	—	324	367	
					United States -	723	2,269	1,941	
					Other Countries	—	—	2	
					Total -	1,331	3,533	8,127	
62	Telegraphic, telephonic wire and apparatus.	—	—	29,283	Holland - -	—	—	1,965	"Telegraphic material." Trifling.
64	Wood and timber, manufactured; staves and empty casks, and unenumerated.	42,081	60,487	91,333	Belgium - -	—	—	8	This heading includes such items as doors and windows, cornices, mouldings, &c., which it is only to be expected will be imported from timber-growing countries, such as Norway, Sweden, America, &c.
					Germany -	52	1,485	4,795	
					Holland - -	—	—	3,479	
					Norway -	3,409	2,620	10,096	
					Sweden - -	2,887	1,800	5,102	
					Madeira -	—	—	10	
					Zanzibar -	—	3	—	
					United States -	15,226	36,582	37,527	
					United States, P.	—	—	1,004	
					States over Border	—	2	—	
					Other Countries	—	—	2	
					Total -	21,574	42,492	63,023	

General Management Department,
Customs, Cape Town,
15th July 1896.

A. ORPEN,
Acting Collector of Customs.

RETURN showing the REASONS why certain ARTICLES are imported into this COLONY from FOREIGN COUNTRIES in preference to being imported from GREAT BRITAIN.

No. 6. Beer and Ale:

The only foreign country from which this article is imported is Germany; it is cheaper and much lighter than the English, and the large German population in the Colony insist on drinking German brewed beer.

English-brewed German beer has been placed on the market, but has found no sale. German beer is imported mostly in quart bottles, and the packing is about the same as the English.

No. 9. *Brushes:*

The cheapest to the medium prices are in demand for South Africa, and those of German manufacture are preferred, not only on account of the make and finish, but care is also taken in the packing and general appearance; these cheap goods open out cleanly and have a much better sale than the common lines of English-made brushes.

German manufacturers particularly cater for the English Colonies, South America, and other countries where a moving population require non-expensive goods. These remarks apply to many other useful articles where the appearance and packing is of consideration.

No. 10. *Butter:*

This article has been mostly imported from Denmark, chiefly on account of its good keeping properties, the quality at the same time being very superior, and the tinning well done, thus avoiding loss from faulty packing. It is put up in various size tins from 1 lb. to 28 lbs., the latter being the size mostly imported.

Within the last couple of years, however, the importation of the Danish article has to a certain extent been reduced through the introduction of Australian butter, the price of the latter being lower, but it is found not to keep so well as the Danish, and will not stand the heat of our summer months. This butter is mostly imported in 56-lb. parchment-lined cases. Price of Danish averages 1*s.* 3*d.* per lb. in bond here against Australian 1*s.* 1*d.* per lb. in bond.

No. 11. *Candles of all sorts:*

The greater part of the candles used in the Colony for some years past are of British manufacture. Formerly the German article commanded the market, but the former are found to be lower in price and of more suitable quality. The cheaper kinds of German-made candles are often found deficient in weight and badly made.

Price of British-made candles about 4*d.* per lb., in bond, against German 4½*d.* per lb.

No. 13. *Carriages and Waggons:*

The foreign importation of vehicles comes from the United States, and is an increasing trade.

The American article is cheaper and lighter in make than the British, and is thus more suitable for the country.

With this lightness it combines strength and lasts very well, though not so long as the British.

The American packing is much better and more economical than the British, and there is seldom any damage in transit.

American importations are very much favoured by rates of freight charged from New York as compared with those from the United Kingdom. The rates are as follows:—

From New York 22*s.* 6*d.*, from London 31*s.* 3*d.* to 33*s.* 9*d.* per ton measurement.

No. 14. *Cement:*

In this article the greatest quantity imported into the Colony has been imported from the United Kingdom, the balance from Germany. In respect to the German article, we should say that in price it is about 5 per cent. cheaper than the British. As regards quality and suitability of the article for this market there is no difference, except that the British brands command a higher price owing to the foreign being less known. The difference of price is not sufficient of itself to induce the importation of German cement, but at times the freights from Hamburg have been lower than from London, owing to the combination of shipbrokers at the latter place keeping freight rates from the United Kingdom at a higher level.

No. 15. *Cheese:*

The class of cheese mostly used in this country is the Dutch Gouda, sweet milk cheese. This kind is preferred on account of its mild flavour; and, having been used in the Colony for many years, Colonial-born people have become accustomed to it. Price about 7*d.* per lb. in bond.

No. 18. *Clocks and Watches:*

Clocks.—American and German manufacturers hold their own for *wooden* and *metal*-cased clocks. The movements are made simply, but effective, and suit all the requirements of the demand, keeping good time and giving general satisfaction. And although remarkably low in price, the artistic manner in which the cases are made to carry the movements helps considerably to sell them; the artistic appearance at once pleases the eye.

London, Birmingham, and Coventry would have to lay down a very large plant nowadays to compete in this article.

Watches.—Switzerland cannot be beaten for the cheapest and good medium watches, and of late years have been most reliable in turning out better goods. Coventry and other English towns in former years helped her to build up this trade by importing the movements and placing them into English-made silver cases and placing them upon the market as English goods.

No. 20. *Cordage and Twine*:

The imports from the United States consist almost entirely of Manilla and Sisal rope. The former is for ship's use and is preferred by some captains, particularly American, as being stronger than the British.

The Sisal is somewhat cheaper, being American fibre.

The import from America is also encouraged by the fact of the freight being cheaper than from the United Kingdom.

Freight from New York	-	25*s.* per ton.
Freight from London	-	31*s.* 3*d.* to 33*s.* 9*d.* per ton.

No. 24. *Earthen and chinaware, including manufactures of clay*:

Earthenware and china.—England commands nearly the whole of this trade, but quite recently Germany has placed a quantity of saleable articles on this market, especially in basins and plates. Decorative china.—This class of article is chiefly imported from France and Germany.

The goods are more suitable for this market, being of a showy, cheap description.

They are also better made up in cartoons and little packets, great discrimination being shown in the way goods are wrapped and boxed before being packed.

No. 25. *Fish*:

(*a*) Herrings.
(*b*) Of other sorts.

Herrings.—Only a small quantity of herrings is imported from outside Great Britain, and these come from Holland. The latter are said to be finer fish than those packed in Great Britain and are more expensive.

Sardines.—French and Portuguese packing is chiefly imported, the principal demand being for a cheap class of goods. It is impossible to make a comparison of values.

Salmon.—The salmon imported here is for the greater part American packing. There is nothing to compete against it in price. The cost of fair quality about 5*s.* 6*d.* per dozen 1-lb. tins in bond.

Above-mentioned kinds represent the greater part of the importation of fish. There are other descriptions imported, but quantity of any particular kind is inconsiderable.

No. 26. *Furniture, Cabinet, and Upholstery Wares*:

Cheap and portable articles have the largest sale in this Colony, and although the British manufacturer can produce three-fourths of such goods, he does not give the necessary care required to the packing, and fails to give general information as to the fixing up of such articles.

This is a very great drawback when the goods have to be made up or put together upon arrival at their destination, and adds considerably to the cost where skilled labour is at a premium.

Freight and transport will not allow of excessive measurement and weight. Austrian, German and American makes have somewhat solved this problem by producing cheap, strong, useful furniture in sections and numbering or marking each part that any unskilled person can place the parts together strongly, correctly, and ready for use.

Attention is drawn to Austrian bentwood furniture, which is light in weight, has a good appearance, and is very durable.

America with her pine, walnut, maple, and other woods produces larger articles for general use, but in all instances no loss of space occurs in the packing with either of these foreign competitors.

Colonial makers also find they can imitate and produce the British patterns, pay a higher scale of wages, and place the lower and medium grade of furniture upon the market

cheaper than imported British goods. This alone points to the bulky packing and high rate of freight charged on such low-priced goods.

Experience tells us that British-made furniture, whether veneered, stained or solid, has not had sufficient time allowed for drying and hardening before packing, especially where articles are shipped in large quantities; consequently expensive labour has to be employed to make the articles saleable.

Expensive well finished British furniture has very small demand, and to introduce such to command a sale, means must be found to pack in smaller compass and freight must be reduced.

Freights for furniture are:

From the United Kingdom - - 31*s.* 3*d.* to 47*s.* 6*d.* per ton.
From the United States - - - 22*s.* 6*d.* to 25*s.* per ton.

Some shipments of furniture have recently been brought from New York by steamers at 15*s.* per ton, and this low freight has to our knowledge diverted orders to America, that would otherwise have gone to Great Britain.

No. 27. *Glass*:—

(*a*) Plate, rough or silvered.
(*b*) Flint.
(*d*) Of other sorts.

Common Table Glass.—The bulk of this article is imported from Belgium; the consumer gets better value owing to labour being so much cheaper than in England; production is cheaper in consequence; this applies equally to the better class of glassware.

Crystal Glass-ware is imported chiefly from France.

Silvered.—Common for decorations, vases, &c. Imported entirely from Bohemia. Importations are not large.

Flint Crystal.—Best table glassware. Nearly all imported from France and Belgium.

Other sorts.—Such as moulded glass is obtained cheapest in England; in fact, England has the entire trade for this class: say glass dishes, plates, tumblers, toilet bottles, pickle jars, salts, glass butters and sugars.

No. 28. *Grease, Tallow, and Animal Fat:*

The best grease used in the Colony comes from Russia. The American importations are very much inferior.

No. 30. *Hardware:*

b. Saws.—The British article is now being sought after; the British makers are copying the American style of finish.

Hinges.—Wrought-iron machine-made butts and back flaps. Tee hinges.

In this line the American are cheaper and quite equal in finish to the British; they are also equally suitable to the market.

Bolts and Nuts.—The American are cheaper in the smaller sizes, and, if anything, rather better in finish. They are also nicely boxed, whereas the British are wrapped in paper. Some patterns made by the Americans are preferred to those made in England.

Wrought-iron Tubes.—The American manufacture is rapidly coming into this market, being cheaper than the British.

Enamelled ware.—This line is largely imported from Germany, being cheaper and at the same time quite equal in quality and finish to the British.

The Germans also produce a larger number of designs. The German packing is better and cheaper; the packing material being mostly soft paper and wood shavings.

No. 32. *Implements and Tools of Industry:*

(*a*) Agricultural.

Agricultural Implements.—Cheap ploughs, winnowing machines, small threshing machines, are imported from Germany; but in none of these do the Germans approach the British and American as regards quality, though in point of cheapness they may beat the two nations slightly.

Tools, &c.—My experience in these convinces me that in saws, braces, chisels, auger bits, axes, the Americans take the lead, not only in price but in quality and finish, but of late years the British makers have followed our American cousins and are now following in their footsteps, and regaining some of the trade in these lines. In packing the goods above mentioned the Americans commenced packing tools in neat cardboard boxes, making them handier for stowage on shelves, and also more attractive to the eye.

In chisels, the Americans send them out all ready for work, ground and sharpened, while the English chisels and gouges have to be sharpened after purchase. This idea is now being followed by the British.

No. 34. *Leather:*

A quantity of hemlock-tanned sides is imported from America for sole leather. It is cheaper than the Colonial tanned article, and its importation is favoured by the low freights ruling from the United States. In quality it is inferior to the Colonial leather.

No. 37. *Machinery:*

(*a*) Agricultural.

Steam engines.—As far as my knowledge goes, the Germans are far behind the British and Americans in these lines. In harvesting machinery the Americans are far before any other. In their first-class machines the quality is as good as can be desired, while in lightness of construction and adaptability to Colonial use they excel all others. Under American I include Canadian, the Dominion now doing a large trade in self-binders, reapers, ploughs, &c.

One great advantage the Americans have over the English is in their superior packing, and they make no charge for this; while the English packing charges are very heavy, frequently amounting to 10 per cent., and often 15 per cent. on the value of goods packed.

Ploughs.—Until lately the best ploughs were of British manufacture, though as regards numbers more of the cheap American ploughs, such as the Eagle, 75, 55, and 25, were imported into this Colony, especially into the Eastern Province, but of late years the Americans have introduced their best ploughs, and these, both with regard to workmanship and efficiency, are equal, and in some cases excel the British.

A few German ploughs are imported; these are of cheap make, and there is but little demand for them; they are suitable only for loose soils.

Nothing is done by the Germans in harvesting machinery, such as self-binders, reapers, mowers, &c.

No. 41. *Musical Instruments:*

In this line the German article is cheaper and quite equal in quality and finish to the British.

Greater care is observed in the packing of German instruments.

Continental makers are also less conservative and more pushing than the English.

No. 44. *Painters' Colours and Materials:*

The great bulk of these, with the exception of turpentine, comes from the United Kingdom.

Of turpentine two-thirds of our imports come from the United States.

No. 48. *Plate and Plated Goods:*

Sheffield and Birmingham are still to the fore both in the cheap small ware and also larger articles for table and other uses, and hold their own as to general finish, but there is a lack of artistic merit, keeping to the old order of things 25 to 30 years ago.

It has been left principally to the American manufacturers to produce and introduce into all the European markets, as well as this and other Colonies, artistic novelties which command a ready sale, and unless our Sheffield and Birmingham makers wake up to this fact the demand for their useful fancy goods will grow less and less yearly.

No. 49. *Provisions not otherwise described:*

The supply of provisions imported into the Colony are drawn from various sources. Amongst the leading articles may be mentioned certain specialities in preserved meats from United States of America, such as corned beef, pork, and lard.

No. 57. *Spirits:*

In this line the principal importation from foreign countries is gin, which comes exclusively from Amsterdam.

Other gins made in England, such as Old Tom and dry unsweetened, have now almost superseded the hollands.

No. 58. *Stationery:*

The introduction of wood pulp by Sweden as a substitute for paper, and the care used in the manipulation rendering the counterfeit so useful for all kinds of work has created quite a change in this branch of the trade.

The competition raging between America, Germany, and Austria for the supremacy of the lead pencil trade points to the high class of machinery used by these countries, and especially the cheap labour of Germany and Austria. To contend against such odds,

the British makers will have to expend many thousands; the last 10 to 15 years they have allowed this branch to slip quietly out of their hands.

Lithographic Printing.—The Rhenish and other towns of Germany, together with Paris, are the principal centres for artistic and well-finished productions of the lithographic art, and at present English manufacturers are but commencing to imitate what the Continentals have held for the past 25 years; the great care exercised by the French and German *lithographic artists* in the production of their stone work, in comparison with the slovenly manner of the British *lithographic printer*, is well known.

No. 61. *Sugar:*

The greater portion of our sugar supplies is imported from Mauritius; this being pure cane sugar has greater sweetening strength than the description manufactured from beetroot, and can be laid down cheaper from there than from any other part, owing to direct communication by steamer and sail. A certain quantity of white beetroot sugar is also imported from Germany and Austria; but only when supplies run short in Mauritius, and the price is more favourable.

Sugars refined in Great Britain are found unsuitable owing to the moisture they contain, and in consequence of which are liable to sweat and ferment.

No. 64. *Wood and Timber manufactured:*

The bulk of the importations under this head are of flooring, and ceiling, and planed lumber from wood-producing countries:—Norway, Sweden, and the United States. The trifling fraction of, say 2 per cent. or 3 per cent, from the United Kingdom is for special lines of some unusual description of prepared boards or turnery, &c.

Chamber of Commerce, Cape Town, 7th July 1896.

General Remarks.—Owing to the enormous development of its mining industry, and the opening up of the new provinces of Matabeleland and Mashonaland, and the consequent large increase of population and wealth, the trade of South Africa has made enormous progress during the last few years.

In 1885 the imports were as follows:—

	£
Cape Colony	4,772,904
Natal	1,518,557
	6,291,461

as compared with the imports in 1895:—

	£
Cape Colony	13,612,405
Natal	2,469,303
	16,081,708

Of this increase, of course, the largest amount has been done with the United Kingdom, but relatively the trade with foreign countries has made the largest strides, as the following figures dealing with the imports through Cape Colonial ports only, but including goods in transit for the Transvaal and Rhodesia, will show.

Return showing the imports from the United Kingdom, British possessions, and foreign countries to the Cape of Good Hope for the years 1885 and 1895, with the respective amount and percentage of increase in the 10 years.

——	Year.	Amount in Sterling.	Increase in Sterling.	Percentage Increase.
		£	£	
United Kingdom	1885	3,759,387	—	—
Do.	1895	10,427,201	6,667,814	177·36
British Possessions	1885	578,810	—	—
Do.	1895	736,584	157,744	27·25
Other Countries	1885	434,707	—	—
Do.	1895	2,448,620	2,013,913	463·28
Totals of above	1885	4,772,904	—	—
Do.	1895	13,612,405	8,839,501	185·18

Of the foreign countries which have taken the major portion of this increased trade, Germany and the United States are the principal ones. The imports from these countries during the last three years have been :—

——	1893.	1894.	1895.
	£	£	£
United States - -	494,854	522,497	873,420
Germany - - -	244,576	448,412	772,940

The detailed reports appended hereto will give the reasons for this increase in particular lines, but there are one or two general reasons which may be added.

As regards the United States, there is no doubt but that one of the most powerful factors in developing their trade with this Colony has been the direct steam communication established in 1894. Up to that time the only direct communication with America was by sailing vessels which arrived here about every two or three months; consequently the trade then had no opportunity for development, required a comparatively large capital, and was in few hands.

But now not only does America enjoy direct steamer communication with South Africa, but the rates of freight from that country are actually lower than from the United Kingdom, and that notwithstanding the fact that the distance is longer, and there is absolutely no return cargo.

It is worthy of note that the steamers from America are run by identically the same companies as own the steamships running between Great Britain and South Africa.

We give for your information a table showing the respective rates of freight on sundry articles from America and from the United Kingdom.

List of Goods.	Rate of Freight from America.	Freight from England by Clan or Bucknall Steamers.	Freight from England by Castle or Union Intermediate Steamer.	Freight from England by Mail Steamer.	Difference in favour of America against lowest Freight from England.	Difference in favour of America against Freight from England per Mail Steamer.
	s. d.	*s. d.*	*s. d.*	*s. d.*	*s. d.*	*s. d.*
Carriages and parts under 30*l.* value, furniture, ploughs, harrows, rakes, harvesters, binders, mowing machines, hay-cutters, scrapers, pick handles, hollow-ware, oil-cans, lawn mowers, garden seats, basketware, bee-hives, brooms, buckets, waggons, carts, trucks, chairs, corn mills, grindstones, waggon jacks, ladders, refrigerators, sash cords, weights, trunks, churns, vices, sad irons, lasts, twine in bundles, washing machines, wheelbarrows, windmills, wire cages, &c., hard woods, &c., &c.	22 6	31 3	32 6	33 9	8 9	11 3
Clocks, scientific instruments, tobacco in bales or hogsheads.	22 6	42 6	45 0	47 6	20 0	25 0
Duck or canvas - - - - -	25 0	42 6	45 0	47 6	17 6	22 6
Do. in bales - - -	25 0	31 3	32 6	33 9	6 3	8 9
Staves - - - - -	15 0	22 6	22 6	22 6	7 6	7 6
Poplar, spruce, white pine, under 15 ft. long and 6 in. diameter.	15 0	22 6	22 6	22 6	7 6	7 6
Poplar, spruce, white pine, over 15 ft. or 6 in. diameter.	15 0	31 3	32 6	33 9	16 3	18 9

It may also be mentioned that up to quite recently sailing vessel freights have been cheaper from the United States of America than from the United Kingdom, in consequence of a combination of sailing ship brokers in London maintaining the latter on an artificially high basis.

As a consequence of these increased facilities of communication and lower freights, several American houses have established agencies here for the sale of American goods.

CAPE OF GOOD HOPE.

As regards the increased trade with Germany, the same reasons which account for the growth of German trade generally, will explain it equally well in connection with South Africa, outside the Transvaal.

It may, however, be stated that many lines of German goods are peculiarly adapted to this country, being cheaper and showier than the British. It must be remembered that outside the mining centres and the coast towns the people are, comparatively speaking, poor; the consequence is that the demand runs on the cheaper classes of goods, and wear is not of so much importance.

As regards freight, the rates were some time ago lower from Germany than from England, and this fact undoubtedly gave an impetus to the importation of certain lines from the former country, but now they are practically the same to Colonial ports.

The German manufacturer has an advantage in the fact that "through rates" are quoted by the German railway companies and the German East African Steamship Company from interior manufacturing towns in Germany to Johannesburg viâ Delagoa Bay.

The operation of the English Trade Mark Act has also assisted the development of German trade; many lines of goods formerly imported viâ England the Colonial importer has found out are of German manufacture and now imports them direct.

Another point in favour of the German trade is the fact that the German manufacturer is much more prolific in novelties than the British, and by that means creates a trade; people will readily buy what is novel and fresh, especially if it is at the same time cheap and showy. On the other hand, the English manufacturer will make the same line of goods, without the slightest attempt at the introduction of any novelty, year after year. He attaches too much weight to the quality of durability, and too little to novelty.

Another factor that contributes in some degree to German trade is the large German population in South Africa; certain goods to which they have been accustomed in Germany have to be imported to meet their demand out here.

In conclusion, it is only fair to mention that one charge frequently brought against the British manufacturer and trader, certainly cannot be brought from South Africa, and that is, that he does not send out travellers to push his trade.

The British manufacturer is well represented in this Colony in almost every line of business, and if he would only get over his conservatism and supply exactly what we require, instead of what he considers we ought to require, there is no reason why he should lose his grip of South African trade.

Chamber of Commerce, Cape Town,
7th July 1896.

THE ASSISTANT TREASURER,

I AGREE in the main with the conclusions arrived at by the Cape Town Chamber of Commerce. They are evidently based, not on the figures given in the attached return, which, as I have pointed out, does not purport to show the importation of foreign as against British products or manufactures, but on the assumed consumption in South Africa of foreign as against British articles. In the matter of furniture, however, I think the Chamber has scarcely done justice to the English manufacturer. A large quantity of high class furniture is imported from such British firms as Maple & Co. and Oetzmann & Co., chiefly by well-to-do Colonists, and such furniture bears a very high reputation for finish and durability, whereas the cost is reasonable.

The figures relating to imports at the conclusion of the Chamber's remarks, have been checked and appear to be correct.

The return originally furnished is now submitted in a neater form, and in duplicate as requested. I may observe that when first forwarded, it was not thought that it was for transmission to the Right Honourable the Secretary of State for the Colonies, but that the information shown thereon was to be utilised in the preparation of a return to be compiled in the Treasury, *vide* Minute of the Honourable the Treasurer, dated 23rd December 1895.

A. ORPEN,
Acting Collector.

Customs, 16th July 1896.

NATAL.

No. 17.

GOVERNOR SIR W. F. HELY-HUTCHINSON to MR. CHAMBERLAIN.

(Received March 22, 1897.)

Government House,
Pietermaritzburg, Natal,
February 23, 1897.

SIR,

IN reply to your Despatch of 2nd November 1895, I transmit a copy of a Minute from the Colonial Secretary, forwarding such information as it has been possible to obtain with reference to the extent to which foreign imports have displaced, or are displacing, similar British goods in Natal.

2. A printed return has been prepared in the form prescribed in Annexe No. 1 of the Despatch. Mr. Murray points out that considerable quantities of goods manufactured in foreign countries and bought in and shipped from the United Kingdom are not included in the return under the head of "importations from foreign countries."

3. Referring to Annexe No. 2 of your Despatch, you will see that the Durban Chamber of Commerce, which at first volunteered to assist in collecting the desired information, eventually discovered that there was a general objection on the part of merchants to entrust information concerning their business to the Chamber of Commerce; and recommended the Government to address its enquiries to the merchants direct. The Government has not been able to obtain, except from a few firms, any statement of reasons for preferring foreign to British goods, nor has it been possible, as yet, to obtain samples. Copies of such replies as have been received from merchants on the subject are forwarded, but as the replies are few in number, it has been thought better not to include in the printed return the "reasons" given for importing foreign goods.

4. The "reasons," so far as they go, may be summarised as follows:—

(1.) Lower freights.
(2.) Lower cost.
(3.) Cheaper and more compact packing.
(4.) Alertness of agents of German and Belgian manufacturers.
(5.) In some cases better or more suitable quality. One firm states that they "have "of late years shipped large quantities of cheap cotton clothing made on the "Continent, but find this can be done now just as well in Great Britain, "possibly owing to the cheap labour derived from the influx of Polish Jews."

5. Assuming that the printed return is correct, the percentage of foreign goods imported, as compared with the total of the imports included in the table, was in 1884, 5·58; in 1889, 7·67; and in 1894, 5·67. The true percentage was probably really somewhat higher than these figures, as Continental goods re-shipped at English ports are not included in the return under "importations from foreign countries." On the other hand, of late years both of the principal British steamship lines have taken to calling at Continental ports, and a direct German line was established in 1890. Goods shipped at Continental ports are included in the return under the head of "importations from foreign countries," and the fact that the percentage, as shown by the return, was only one-tenth per cent. more in 1894 than in 1884 would seem to indicate that the proportion of foreign imports was really less in the latter year.

6. On the whole, the information which has so far been collected (which, however, is admittedly imperfect) points to the conclusion that though there has probably been a displacement of British goods in some lines, that displacement was not very serious during the ten years 1884–94, and that, on the total of the imports included in the return, the displacement, if any, did not assume large proportions. Comparing 1894 with 1889, the displacement would appear to have materially decreased.

7. The matter of samples is being followed up, and I have asked the Colonial Secretary to let me know in due course what he has been able to do about them.

I have, &c.,
WALTER HELY-HUTCHINSON.

NATAL.

Enclosure in No. 17.

COLONIAL SECRETARY to GOVERNOR.

MINUTE.

Colonial Secretary's Office,
Pietermaritzburg, Natal,
February 19, 1897.

HIS EXCELLENCY,

I HAVE to express my regret that much delay has occurred in the collection of the information called for in the Despatch from the Right Honourable the Secretary of State for the Colonies, dated 28th November, 1895, on the question of trade with the United Kingdom.

A return has been prepared showing, for the years 1884, 1889, and 1894, the values of articles imported into the Colony from foreign countries, and that return is accompanied by a report from the Collector of Customs, who, as will be seen, is unable to furnish much of the details asked for in the Secretary of State's Despatch. This return also is deficient in this regard, that a considerable quantity of goods manufactured in foreign countries is bought in, and shipped from, the United Kingdom, thus being included in the imports from the United Kingdom.

The Durban Chamber of Commerce having expressed its willingness to assist in collecting the information required by the Secretary of State, its offer was accepted, and correspondence with the Chamber was at once entered upon. A copy of the correspondence is forwarded for your Excellency's information, and it will be seen that, after a delay of some months, the Chamber found itself unable to help in the matter.

A circular was then framed in this office and addressed to the leading merchants in the Colony, asking if they would furnish the information desired, and informing them that, in the event of their doing so, their names would not be divulged. To such as expressed their willingness to assist in the matter a copy of the Secretary of State's Despatch was sent, in order that the scope of the information required might be made more clear. The replies to the circular have come in but slowly. Copies are attached to those letters (the names of the firms not being given) who have supplied information of any value whatever.

The matter of the supply of samples is one of difficulty, some firms expressing themselves unable to supply samples, while others have their London agents. With regard to the latter, probably the best and most economical course will be for us to obtain, if possible, the names of the London agents, and to procure through the Colony's Agent-General samples of the various classes of foreign goods sent out to the Colony. This matter of samples is being followed up, and it is hoped that in a short while a fairly satisfactory collection of samples will be placed at the disposal of the Secretary of State.

THOS. K. MURRAY,
Colonial Secretary.

SCHEDULE of PAPERS to accompany the COLONIAL SECRETARY'S MINUTE of February 19, 1897.

1. Return by the Collector of Customs, showing for the years 1884, 1889, and 1894, the value of articles imported into the Colony from foreign countries, together with a report by the Collector of Customs on the Secretary of State's Despatch.

*2. Correspondence with Durban Chamber of Commerce.

†3. Circulars to merchants.

4. Replies received from merchants.

COLLECTOR OF CUSTOMS, NATAL, to TREASURER.

REPORT.

Under the 3rd paragraph of the Despatch I regret I cannot state any reason why a colonial importer pref[illegible] foreiegn article to similar goods of British manufacture, beyond the fac[illegible]king, the foreign article is of less cost.

* P[illegible]e is printed. † Not printed.

I am also unable to furnish the details asked for in par. 4, but I would beg to point out that the greater part of the articles imported from foreign countries can be obtained at a less cost than similar articles of British manufacture; added to this, there are a number of foreign residents in this Colony and in the Transvaal who are connected with foreign mercantile houses, and who import largely through them.

Goods from foreign countries that have been transhipped at British ports are classified in our returns as the produce of the country from which they originally came.

Annexe 2.

In preparing the return the instructions under Annexe 2 have been carried out wherever the information asked for could be given. I am unable to fill in the particulars asked for in par. 5, for want of sufficient knowledge to do so.

I have no patterns in my possession for the purpose of being forwarded home, but should it be deemed necessary to forward any, I would suggest that application be made to the Chamber of Commerce here, with a request that, if possible, the patterns asked for in par. 6 may be supplied by them for that purpose.

J. BYRNE,
Collector of Customs.

Port Natal, January 23, 1896.

RETURN showing for the Years 1884, 1889, and 1894 the VALUE of ARTICLES IMPORTED into the COLONY from FOREIGN COUNTRIES.

No.	Commodity.	1884.			1889.			1894.		
		Total Value of Importation.	Value of Importation from Foreign Countries.		Total Value of Importation.	Value of Importation from Foreign Countries.		Total Value of Importation.	Value of Importation from Foreign Countries.	
			Countries.	Value.		Countries.	Value.		Countries.	Value.
		£		£	£		£	£		£
6	Beer and ale	—	—	—	92,040	(*a*) Germany (*b*) Holland (*c*) Delagoa Bay Total	11,685 402 29 12,116	29,002	Germany Holland United States of America Total	2,886 124 2 3,012
9	Books, printed	—	—	—	21,551	Germany Holland Portugal United States of America Total	638 544 3 302 1,487	19,379	Belgium Germany Holland Delagoa Bay United States of America Total	101 580 118 1 1,740 2,485
10	Butter	9,425	Germany Sweden United States of America Total	2,467 24 388 2,879	10,181	Germany Holland Sweden Delagoa Bay United States of America Total	267 639 20 11 33 970	7,172	France Germany Holland United States of America Total	25 191 259 4 479
11	Candles of all sorts	12,526	Germany	2,513	39,599	Germany Holland Total	2,737 286 3,023	23,275	Germany Holland United States of America Total	1,234 35 234 1,503
14	Cement	—	—	—	—	—	—	9,837	Belgium France Germany Holland Sweden United States of America Total	292 2 4,116 116 158 1 4,687

15	Cheese	—		—	14,390	Germany	515	7,369	Belgium	26
						Holland	3,266		Germany	280
						Delagoa Bay	11		Holland	1,184
						United States of America	2		Italy	3
									United States of America	4
						Total	3,794		Total	1,447
16	Chemical products, dyestuffs, including drugs and medicines.	—		—	77,490	Germany	1,614	59,116	Belgium	95
						Holland	390		France	103
						Sweden	1		Germany	1,411
						Delagoa Bay	13		Holland	26
						Madagascar	112		Italy	69
						Mozambique	63		Delagoa Bay	119
						United States of America	3,222		Zanzibar	35
									United States of America	2,213
						Total	5,415		Total	4,071
18	Clocks and watches	2,205	Germany	15	10,638	Germany	444	5,594	Germany	1,224
			United States of America	275		Holland	222		Holland	35
						United States of America	933		United States of America	234
			Total	290		Total	1,599		Total	1,493
24	Earthen and chinaware, including manufactures of clay.	—		—	29,305	Germany	1,512	16,835	Belgium	132
						Holland	443		Germany	681
						United States of America	66		Holland	48
									Sweden	4
									Italy	12
									United States of America	186
						Total	2,021		Total	1,013
25	Fish:									
	(a) Tinned and preserved meats.	12,610	Germany	131	30,704	Germany	692	21,010	France	146
			United States of America	1,606		Holland	483		Germany	252
						Delagoa Bay	1		Holland	14
						United States of America	4,050		Sweden	6
									Portugal	43
									Delagoa Bay	3
									Zanzibar	5
									United States of America	7,658
			Total	1,737		Total	5,226		Total	8,127
	(b) Salted and dried	—		—	1,457	Germany	38	949	Germany	44
						Holland	46		Sweden	2
						Delagoa Bay	1		Zanzibar	10
									Brazil	5
						Total	85		Total	61

No.	Commodity.	1884.			1889.			1894.		
		Total Value of Importation.	Value of Importation from Foreign Countries.		Total Value of Importation.	Value of Importation from Foreign Countries.		Total Value of Importation.	Value of Importation from Foreign Countries.	
			Countries.	Value.		Countries.	Value.		Countries.	Value.
		£		£	£		£	£		£
26	Furniture, cabinet and upholstery-wares.	24,088	Germany - - -	1,112	116,840	Germany - - -	8,733	35,863	Belgium - - -	145
			United States of America -	1,866		Holland - - -	1,058		Germany - - -	3,186
						Foochoo - - -	6		Holland - - -	115
						Delagoa Bay - -	19		Italy - - - -	1
						Madagascar - - -	5		Beira - - - -	97
						Madeira - - -	64		Delagoa Bay - -	49
						United States of America -	12,636		Madeira - - -	55
									Zanzibar - - -	5
									United States of America -	2,084
			Total - -	2,978		Total - -	22,516		Total - -	5,737
27	Glass:									
	(a) Plate, rough or silvered -	—	- - - - -	—	—	- - - -	—	3,598	Belgium - - -	204
	(b) Flint.								Holland - - -	167
									Total - -	371
27	Glassware of all kinds:									
	(c) Common bottles -	7,589	Germany - - -	476	25,018	Germany - - -	2,846	12,045	Belgium - - -	200
	(d) Of other sorts.		Inhambane - -	2		Holland - - -	1,276		Germany - - -	1,939
			Quilimane - - -	2		Delagoa Bay - -	12		Holland - - -	89
			Mozambique - -	16		Mozambique - - -	22		Chinde - - -	4
						United States of America -	51		Delagoa Bay - -	8
									United States of America -	407
			Total - -	496		Total - -	4,207		Total - -	2,635
30	Hardware and cutlery - -	13,534	Germany - - -	239	149,494	Germany - - -	3,355	109,855	Belgium - - -	589
			Madagascar - - -	14		Holland - - -	835		Germany - - -	2,986
			Mozambique - -	6		Delagoa Bay - -	13		Holland - - -	91
			United States of America -	472		Mozambique - - -	36		Beira - - - -	8
						United States of America -	9,058		Chinde - - -	4
									Delagoa Bay - -	86
									Zanzibar - - -	15
									United States of America -	10,544
			Total - -	731		Total - -	13,297		Total - -	14,323

82	Implements and tools of industry	8,368	Germany - - -	92	23,496	Germany - - -	343	17,587	Germany - - -	1,173
			United States of America -	5,673		Holland - - -	23		Holland - - -	23
						United States of America -	15,879		United States of America -	11,701
			Total - -	5,765		Total - -	16,244		Total - -	12,897
84	Leather:									
	(a) Unwrought - -	—	- - - -	—	973	United States of America -	57	1,956	United States of America -	871
	(b) Wrought of all descriptions.	—	- - - -	—	164,021	Germany - - -	1,309	11,963	Belgium - - -	44
						Holland - - -	270		Germany - - -	1,055
						Delagoa Bay - -	167		Holland - - -	10
						United States of America -	97		Beira - - - -	5
									Delagoa Bay - - -	309
									Zanzibar - - -	233
									United States of America -	887
						Total -	1,843		Total - -	3,543
86	Linen and jute manufactures:									
	(a) Linen manufactures, white and plain.	—	- - - -	—	3,600	Germany - - -	12	—	- - - -	—
						United States of America -	426			
						Total - -	438			
	(c) Sailcloth and sails -	—	- - - -	—	9,895	Germany - - -	250	—	- - - -	—
						Holland - - -	77			
						United States of America -	606			
						Total - -	933			
87	Machinery:									
	(a) Worked by steam, animal, or water power.	—	- - - -	—	227,611	Germany - - -	3,271	47,819	Belgium - - -	7
						Holland - - -	8,974		Germany - - -	986
						United States of America -	27,169		Holland - - -	107
									Beira - - - -	156
									Delagoa Bay - -	22
									United States of America -	3,187
						Total - -	39,414		Total - -	4,465
	(b) Of other sorts - -	5,688	Germany - - -	450	18,072	Germany - - -	2,396	8,651	Belgium - - -	188
			United States of America -	501		Holland - - -	1,179		Germany - - -	565
						Sweden - - -	3		Holland - - -	194
						United States of America -	2,933		Italy - - - -	14
									Sweden - - -	2
									Delagoa Bay - -	11
									Zanzibar - - -	27
									United States of America -	1,143
			Total - -	951		Total - -	6,511		Total - -	2,144

No.	Commodity.	1884.			1889.			1894.		
		Total Value of Importation.	Value of Importation from Foreign Countries.		Total Value of Importation.	Value of Importation from Foreign Countries.		Total Value of Importation.	Value of Importation from Foreign Countries.	
			Countries.	Value.		Countries.	Value.		Countries.	Value.
		£		£	£		£	£		£
40	Metals:									
	(a) Iron - - -	14,115	Germany - - -	55	34,126	Holland - - -	193	31,557	Belgium - - -	768
	(c) Wire and materials for wire fencing.		United States of America -	2,291		United States of America -	1,767		Germany - -	877
									Holland - - -	2,268
									United States of America -	8,237
			Total - -	2,346		Total - -	1,962		Total - -	12,150
	(d) - - - - -	—	- - - -	—	11,114	Germany - - -	515	5,794	Belgium - - -	519
						Holland - - -	2,863		Germany - - -	27
									Holland - - -	885
									Beira - - -	13
						Total -	3,378		Total - -	1,394
	(h) Cast or wrought and all other iron manufactures.	38,729	Germany - -	632	153,006	Germany - - -	2,977	24,778	Belgium - - -	253
			Delagoa Bay - - -	10		Holland - - -	1,337		Germany - - -	390
			Inhambane - -	4		Sweden - - -	11		Sweden - - -	174
			United States of America	3,630		United States of America -	11,184		Delagoa Bay - -	25
						Delagoa Bay - -	10		Mozambique - - -	2
									Quilimane - - -	1
									United States of America -	1,903
			Total - -	4,276		Total - -	15,519		Total - -	2,748
	(e) Tin - - -	—	- - - -	—	7,430	Germany - - -	187	3,263	Germany - - -	134
	(a) Tinware.					Holland - - -	27		United States of America -	1,009
						Mozambique - - -	4			
						United States of America -	492			
						Total -	710		Total - -	1,143
	(f) Zinc, wrought and unwrought.	—	- - - -	—	2,046	Germany - - -	11	1,468	Belgium - - -	719
						Holland - - - -	460		Germany - - -	27
									Holland - - -	189
						Total - -	471		Total - -	935

41	Musical instruments	8,878	Germany	1,846	3,664	Germany	7,642	16,765	Germany	7,142
			Mozambique	11		Holland	2,932		Holland	4
			United States of America	377		Delagoa Bay	7		Egypt	28
						United States of America	5,052		Zanzibar	7
									United States of America	1,032
			Total	2,234		Total	15,633		Total	8,213
46	Pickles, sauces, jellies, jams, and preserved vegetables.	6,324	Germany	58	41,539	Germany	764	12,537	Belgium	3
			United States of America	328		Holland	537		France	4
						Portugal	1		Germany	485
						Delagoa Bay	4		Italy	1
						Mozambique	1		Portugal	2
						United States of America	1,990		Delagoa Bay	7
									United States of America	709
			Total	386		Total	3,297		Total	1,211
49	Provisions (not otherwise described).	—	- - - -	—	107,739	Germany	413	71,917	Belgium	41
						Holland	855		Germany	1,707
						Portugal	13		Holland	158
						Delagoa Bay	30		Italy	14
						Inhambane	83		Sweden	3
						Madagascar	18		Chinde	24
						Mozambique	15		Delagoa Bay	12
						Quilimane	29		United States of America	6,150
						United States of America	5,476			
						Total	6,932		Total	8,109
57	Spirits:									
	(a) Brandy	—	- - - -	—	53,618	Germany	527	16,327	France	444
						Holland	174		Germany	69
						Delagoa Bay	2,670		Holland	26
						United States of America	1		Italy	508
									Delagoa Bay	151
									Zanzibar	98
						Total	3,372		Total	1,296
	(b) Gin	—	- - - -	—	17,476	Germany	415	6,863	France	7
						Holland	4,830		Germany	265
						Delagoa Bay	174		Holland	3,885
									Delagoa Bay	8
						Total	5,419		Total	4,165
	(c) Rum	—	- - - -	—	—	- - - -	—	1,218	Germany	18
									Holland	4
									Delagoa Bay	876
									Total	898

No.	Commodity.	1884.			1889.			1894.		
		Total Value of Importation.	Value of Importation from Foreign Countries.		Total Value of Importation.	Value of Importation from Foreign Countries.		Total Value of Importation.	Value of Importation from Foreign Countries.	
			Countries.	Value.		Countries.	Value.		Countries.	Value.
57	Spirits:—*cont.*	£		£	£		£	£		£
	(*d*) Sweetened	—		—	8,135	Germany	437	3,613	Belgium	2
						Holland	489		France	93
						Sweden	12		Germany	65
						Delagoa Bay	1		Holland	81
						United States of America	68		Italy	2
									Spain	24
									Sweden	4
									Delagoa Bay	24
									United States of America	214
						Total	1,077		Total	439
61	Sugar, refined	1,983	Germany	187	—		—	1,195	Germany	20
			United States of America	443					Holland	74
									Zanzibar	2
			Total	630					Total	96
62	Telegraphic wire and apparatus	—		—	—		—	3,800	Belgium	17
									Germany	24
									Holland	422
									Sweden	13
									Delagoa Bay	22
									United States of America	47
									Total	545
64	Wood and timber—manufactured staves, and empty casks, and unenumerated.	4,113	Sweden	81	11,859	Germany	825	5,598	Belgium	4
			Madagascar	65		Holland	69		Germany	261
			United States of America	2,783		Sweden	237		United States of America	2,796
						Madagascar	46			
						United States of America	5,072			
			Total	2,929		Total	5,749		Total	3,061
	Totals	170,125	Totals	31,141	1,518,192	Totals	204,713	654,997	Totals	120,266

Custom House, Natal, January 23rd, 1896.

J. BRYNE, Collector of Customs.

SECRETARY, DURBAN CHAMBER OF COMMERCE, to COLONIAL SECRETARY.

Durban Chamber of Commerce, Incorporated.

SIR, Durban, June 3, 1896.

WITH further reference to my letter of April 17 last, on the subject of the Trade returns desired by the Secretary of State for the Colonies, I have the honour, by direction, to inform you that there seems to be an objection generally on the part of Durban merchants to entrust information concerning their business to other merchants, members of the Chamber of Commerce, and that, in the opinion of the Committee, Government would have better success if it approached merchants direct.

I enclose for your information copy of circular which was addressed to many members of the Chamber on March 24, and papers in reply thereto.

I have, &c.,

GEO. BURGESS,
Secretary.

Durban Chamber of Commerce, Incorporated.

DEAR SIRS, Durban, March 24, 1896.

You will be aware of the Despatch recently addressed by Mr. Chamberlain to Governors of British Colonies, with the object of securing as large a share as possible of the mutual trade of the United Kingdom and her colonies for British and colonial producers and manufacturers, and of the investigation he is causing to be made into the question of the extent to which foreign imports in the Colonies have displaced similar British goods.

This Chamber of Commerce has been invited by our Government to assist it in replying to Mr. Chamberlain, and the Committee proposes to endeavour to obtain from Durban wholesale merchants a list of all classes of foreign-made goods stocked by them which compose more than 5 per cent. of their entire imports of those particular classes of goods, together with a list of the wholesale prices of samples of such foreign-made goods.

A duly appointed agent of the Chamber will wait on you shortly, and the Committee will be obliged to you if you will kindly give him all the information and assistance you can in the prosecution of his enquiries.

Yours, &c.,

GEO. BURGESS,
Secretary.

	Durban wholesale Duty-paid.	From
	Selling Price per Bottle.	
Absinthe	4*s.* 9*d.*	France.
Ale—		
Sun Brand — Quarts	10*d.*	Germany.
Spaten — „	1*s.*	„
Marienthal — „	10*d.*	„
Heller's — „	8*d.*	„
Brandy—		
Hennessy's or Martell's ***	5*s.* 6*d.*	France.
Do. *	4*s.* 9*d.*	„
Associated Vineyard Company	4*s.*	„
Saunier's	2*s.* 9*d.*	„
Burgundy (Still)—		
Beaune	3*s.* 3*d.*	France.
Pommard	3*s.*	„
Champagne—Pommery and Greno	8*s.* 4*d.*	„
Corks for wine — Per gross	3*s.* 3*d.*	Spain.
Soda water — „	2*s.* 3*d.*	„
Tapered — „	1*s.*	„
Clarets — From	1*s.* 2*d.* to 5*s.*	France.
Cigars — At per 100	11*s.* 6*d.* to 21*s.*	Holland.
Cigarettes—Cheap quality, "Old Gold"	2*d.* per pkt. of 10	America.
Gin (4 gall.)—Rynbendes	3*s.* 4*d.*	Holland.
„ Spenghus	3*s.*	„

NATAL.

	Durban wholesale Duty-paid.	From
	Selling Price per Bottle.	
Liqueurs—		
Benedictine	8*s.*	France.
Chartreuse	10*s.*	„
Curaçoa	4*s.* 9*d.*	„
Maraschino	4*s.* 9*d.*	„
Peppermint	4*s.* 9*d.*	„
Mineral Waters—Johannis	6*d.*	Germany.
Port Wine — From	3*s.* to 4*s.*	Portugal.
Rhine Wine „	3*s.* to 5*s.*	Germany.
Sherry „	2*s.* 9*d.* to 4*s.*	Spain.
Vermouth	2*s.* 9*d.*	France.

Goods.	Durban Price. Subject to 5 per cent. Discount.	Natal Duty.	From
Blankets—			
Grey	1*s.* 9*d.* each	15 per cent. ad val.	Germany.
White	2*s.* 6*d.* „	„	„
Concertinas	25*s.* to 60*s.* per doz.	5 per cent. ad val.	„
Furniture—			
Bureaus	24*s.* each	„	America.
Chairs	26*s.* and 30*s.* per doz.	„	„
„ No. 14	54*s.* per doz.	„	Austria.
Washstands	45*s.* „	„	America.
Sewing machines—			
Lock-stitch	45*s.* each	„	„
Chain-stitch	18*s.* „	„	Germany.
Singer system	57*s.* 6*d.* „	„	„
Axes—			
Long-handled	40*s.* per doz.	„	America.
Pick, 5 lb.	37*s.* „	„	„
to 7 lb.	41*s.* 6*d.* „	„	„
Brushes—			
Shoe, sets of three	1*s.* 9*d.* to 3*s.* 3*d.*	„	Germany.
Horse „	10*s.* to 13*s.* 6*d.* per doz.	„	„
Cloth „	12*s.* per doz.	„	„
Chimneys, lamp—			
"Kosmos," No. 6	2*s.* „	„	„
„ No. 14	2*s.* 9*d.* „	„	„
"Veritas," No. 20	6*s.* 6*d.* „	„	„
„ No. 30	8*s.* 6*d.* „	„	„
Hatchets, axe-pattern, No. 1	19*s.* „	„	America.
Hay knives	5*s.* each	„	„
Netting, wire—			
3 ft. by 2 in.	2*d.* per yard	„	Germany.
6 ft. by 2 in.	3½*d.* „	„	„
Nails—			
Cut, 3", 4", and 5"	13*s.*, 12*s.* 6*d*, 12*s.* per 100 lb.	„	America.
Brads, 2½"	12*s.* per 100 lbs.	„	„
Wire, 4" by 8	12*s.* per cwt.	„	Germany.
1" by 14	18*s.* 6*d.* „	„	„
2½" by 9	12*s.* 6*d.* „	„	„
Nail-pullers	4*s.* 6*d.* each	„	„
Pliers, fencing, 10"	21*s.* 6*d.* per doz.	„	„
Pumps, semi-rotary, No. 1	31*s.* 6*d.* each	„	„
„ No. 7	70*s.* „	„	„
Razors	27*s.* 6*d.* to 42*s.* 6*d.* per doz.	„	„
Rails, tram, steel	12 lb. per yard, 9*l.* per ton	„	„
Stoves, paraffin	5*s.* 6*d.* and 10*s.* 6*d.* each	„	„
Staples—			
Galvanised, 1¼ by 8	20*s.* per cwt.	„	„
Bright, 1¼ by 8	14*s.* 6*d.* „	„	„
Wire—			
Galvanised, Nos. 6, 7, 8, 9	10*s.* „	„	„
„ No. 16	22*s.* „	„	„
Black, Nos. 6, 7, 8, 9	9*s.* „	„	„
„ No. 14	11*s.* 3*d.* „	„	„
Wheelbarrows, canal	10*s.* 6*d.* each	„	America.

Goods.	Durban Price. Subject to 5 per cent. Discount.	Natal Duty.	From
Apricots, 2½ lb. tins	11*s.* 6*d.* per doz.	2*d.* per lb.	America.
Butter, 1 lb. tins	2*s.* 2*d.* per lb.	3*d.* „	Denmark.
Bottles, soda water, 5 oz.	29*s.* per gross.	5 per cent. ad val.	Germany.
Beef, corned, 1 lb. tins	8*s.* per doz.	2*d.* per lb.	America.
Cheese	10*d.* per lb.	„	Holland.
Chicory, 56 lb. tins	31*s.* per cwt.	5*s.* per 100 lb.	Belgium.
Cocoa, 1 lb. tins	36*s.* 6*d.* per doz.	2*d.* per lb.	Holland.
Doors 2 ft. 6 in. by 6 ft. 6 in.	8*s.* each	5 per cent. ad val.	America.
Earthenware bowls, size 42	1*s.* 3*d.* per doz.	„	Germany.
Glass, 8 by 10, case of 50 ft.	9*s.* 9*d.* per case	„	Belgium.
Hops	1*s.* 1*d.* per lb.	„	Germany.
Matches	2*s.* 11*d.* per gross	1*s.* per gross	Sweden.
Margarine	1*s.* 3*d.* per lb.	3*d.* per lb.	France.
Oats	9*s.* per 100 lbs.	5 per cent. ad val.	America.
Oil, lard, case of 8 imperial gallons	37*s.* 6*d.* per case	6*d.* per gallon	„
Pears, 2½ lb. tins	13*s.* 6*d.* per doz.	2*d.* per lb.	„
Peaches, 2½ lb. tins	12*s.* 6*d.* per doz.	„	„
Ploughs, No. 75	25*s.* 6*d.* each	5 per cent. ad val.	„
Paraffin, case of 8 imperial gallons	8*s.* per case	3*d.* per gallon	„
Salmon, 1 lb. tins	7*s.* 11*d.* per doz.	2*d.* per lb.	„
Sugar—			
Crushed lump	34*s.* per cwt.	1*d.* „	„
Chopped	5½*d.* per lb.	„	„
Vinegar, 2-gallon demijohns	4*s.* per demijohn	5 per cent. ad val.	Germany.
Windows, 8 by 10	6*s.* 6*d.* each	„	America.

Replies Received from Merchants.

(No. 1.)

Duly, in obedience to your request of the 13th instant, we now have the honour to hand you a list which we have compiled of goods imported by us from countries other than the United Kingdom or British Possessions.

You will notice we have remarked on the respective merits of the different classes of goods, and given such information generally as we think will prove of service. Our report, however, falls short of the requirement in omitting the values and quantities of such importations; these particulars we regret being unable to supply.

Trusting, however, the report will prove of some use and service although deficient in these particulars.

Furniture.—From Hamburg.—Made of bentwood, cane, and wood-seated. This class of light furniture is well adapted for hot climates; it is in general favour on account of its cheapness and suitability for the Colonial town and farm life. It is easily put together by any novice without the aid of glue or special tools.

Furniture.—From the United States.—Generally in low-priced goods, cheaper than to be had elsewhere. Packed compactly in a knocked down condition and in small handy cases. Well suited for transport by ox-wagon.

Agricultural implements.—From the United States.—Special kinds of low-priced ploughs, chiefly Eagle Wood beam, No. 75, and Wood beam Hill Side, well suited for breaking up virgin soil, and largely used by natives, who purchase the cheapest article obtainable.

Agricultural implements.—From Germany.—Light steel and iron two and three-furrow ploughs, generally of lighter construction than most English patterns. Well suited for light and medium soils, selected largely because of low cost and adaptability for Colonial requirements. Packed in strong and compact cases, every care being taken to ensure minimum measurement for shipment.

Preserved fruits, tinned meats and fish of various kinds. - From the United States.

Galvanised barbed wire.—From the United States.—Special brands are in favour as the "Iowa," quality generally satisfactory, and price usually lower than English rates. Average cost 20 per cent. below English price.

Medicines.—From the United States.—Special goods such as sarsaparilla, cherry pectoral, hair vigor, painkiller, pills, syrups, &c., all of special brands.

NATAL.

In the foregoing are particularised the chief and notable lines in our "foreign importations"; other goods, not above enumerated, form but a small percentage of our business.

(No. 2.)

With reference to your Circular Letter dated 5th August last, we have the honour to hand you herewith a list of goods which, according to our experience, at one time were almost entirely imported from the United Kingdom, but which are now imported in greater quantities from other countries than the United Kingdom.

In our opinion the causes which have operated in increasing the imports of these articles from foreign counties, are, in the order of their importance:—

(1.) Cheaper freights.
(2.) Lower original costs.
(3.) Cheaper and more compact packing.

Goods.	Durban Price. Subject to 5 per cent. Discount.	Natal Duty.	From
Blankets—			
Grey	1*s.* 9*d.* each.	15 per cent. ad val.	Germany.
White	2*s.* 6*d.* „	„	„
Concertinas	25*s.* to 60*s.* per doz.	5 per cent. ad val.	„
Furniture—			
Bureaus	24*s.* each.	„	America.
Chairs	25*s.* to 30*s.* per doz.	„	„
„ No. 14	54*s.* per doz.	„	Austria.
Washstands	45*s.* „	„	America.
Sewing machines—			
Lock-stitch	45*s.* each.	„	„
Chain-stitch	18*s.* „	„	Germany.
Singer system	57*s.* 6*d.* each.	„	„
Axes—			
Long-handled	40*s.* per doz.	5 per cent. ad val.	America.
Pick, 5 lb.	37*s.* „	„	„
„ to 7 lb.	41*s.* 6*d.* per doz.	„	„
Brushes—			
Shoe, sets of three	1*s.* 9*d.* to 3*s.* 3*d.*	„	Germany.
Horse	10*s.* to 13*s.* 6*d.* per doz.	„	„
Cloth	13*s.* per doz.	„	„
Chimneys, lamp—			
"Kosmos," No. 6	2*s.* „	„	„
„ No. 14	2*s.* 9*d.* „	„	„
"Veritas," No. 20	6*s.* 6*d.* „	„	„
„ No. 30	8*s.* 6*d.* „	„	„
Hatchets, axe-pattern, No. 1	19*s.* „	„	America.
Hay knives	5*s.* each.	„	„
Netting, wire—			
3 ft. by 2 in.	2*d.* per yard	„	Germany.
6 ft. by 2 in.	3½*d.* „	„	„
Nails—			
Cut, 3", 4", and 5"	13*s.*, 12*s.* 6*d.*, 12*s.* per 100 lb.	„	America.
Brads, 2½"	12*s.* per 100 lbs.	„	„
Wire, 4" by 8	12*s.* per cwt.	„	Germany.
1" by 14	18*s.* 6*d.* „	„	„
2½" by 9	12*s.* 6*d.* „	„	„
Nail-pullers	4*s.* 6*d.* each.	„	„
Pliers, fencing, 10"	21*s.* 6*d.* per doz.	„	„
Pumps, semi-rotary, No. 1	31*s.* each.	„	„
„ No. 7	70*s.* „	„	„
Razors	27*s.* 6*d.* to 42*s.* 6*d.* per doz.	„	„
Rails, tram, steel	12 lb. per yard, 9*l.* per ton	„	„
Stoves, paraffin	5*s.* 6*d.* to 10*s.* 6*d.* each	„	„
Staples—		„	„
Galvanised, 1¼ by 8	20*s.* per cwt.	„	„
Bright, 1¼ by 8	14*s.* 6*d.* „	„	„
Wire—			
Galvanised, Nos. 6, 7, 8, 9	10*s.* „	„	„
„ No. 16	22*s.* „	„	„
Black, Nos. 6, 7, 8, 9	9*s.* „	„	„
„ No. 14	11*s.* 3*d.* „	„	„
Wheelbarrows, cabal	10*s.* 6*d.* each.	„	America.
Apricots, 2½ lb. tins	11*s* 6*d.* per doz.	2*d.* per lb.	„
Butter, 1 lb. tins	2*s.* 2*d.* per lb.	3*d.* „	Denmark.
Bottles, soda water, 5 oz.	29*s.* per gross	5 per cent. ad val.	Germany.
Beef, corned, 1 lb. tins	8*s.* per doz.	2*d.* per lb.	America.
Cheese	10*d.* per lb.	„	Holland.

Goods.	Durban Price. Subject to 5 per cent. Discount.	Natal Duty.	From
Chicory, 56 lb. tins	31*s.* per cwt.	5*s.* per 100 lbs.	Belgium.
Cocoa, 1 lb tins	36*s.* 6*d.* per doz.	2*d.* per lb.	Holland.
Doors, 2 ft. 6 in. by 6 ft. 6 in.	8*s.* each.	5 per cent. ad val.	America.
Earthenware bowls, size 42	1*s.* 3*d.* per doz.	,,	Germany.
Glass, 8 by 10, case of 50 ft.	9*s.* 9*d.* per case	,,	Belgium.
Hops	1*s.* 1*d.* per lb.	,,	Germany.
Matches	2*s.* 11*d.* per gross	1*s.* per gross	Sweden.
Margarine	1*s.* 3*d.* per lb.	3*d.* per lb.	France.
Oats	9*s.* per 100 lbs.	5 per cent. ad val.	America.
Oil, lard, case of 8 imperial gallons	37*s.* 6*d.* per case	6*d.* per gallon	,,
Pears, 2½ lb. tins	13*s.* 6*d.* per doz.	2*d.* per lb.	,,
Peaches, 2½ lb. tins	12*s.* 6*d.* per doz.	,,	,,
Ploughs, No. 75	25*s.* 6*d.* each.	5 per cent. ad val.	,,
Paraffin, case of 8 imperial gallons	8*s.* per case	3*d.* per gallon	,,
Salmon, 1 lb. tins	7*s.* 11*d.* per doz.	2*d.* per lb.	,,
Sugar—			
Crushed lump	34*s.* per cwt.	1*d.* ,,	,,
Chopped	5½*d.* per lb.	,,	,,
Vinegar, 2-gallon demijohns	4*s.* per demijohn	5 per cent. ad val.	Germany.
Windows, 8 by 10	6*s.* 6*d.* each.	,,	America.

(No. 3.)

As nearly all my goods are shipped from London it is very difficult for me to say what are foreign and what are British goods, and the extent to which same are displacing or have displaced British goods.

It is a fact that many lines are first shipped to London from the Continent and afterwards shipped from London as British goods. I can only speak in a general way, and to say agents of German and Belgian manufacturers are always on the alert to secure samples in the Colony of British goods, which they send home to be copied, such as hardware, tinware, ironmongery, cutlery, clothing, and Manchester goods. Many lines they copy very accurately, but as a rule the value is not so good, and probably the lower rate of wages in these countries accounts for the lesser price.

(No. 4.)

In reply to your letter of the 14th October, we are not in a very good position to reply to your queries as to the reasons for German goods ousting out British in the latter's own colonial markets, as we ourselves do not stock goods here, although we do a very large shipping trade from London.

Speaking generally, we think the South African States will always be good customers of Germany and Belgium, as they are buyers for the native trade of an immense quantity of cheap goods. For instance, most of the native trinkets—pipes, purses, snuff-boxes, looking-glasses, brass and other ornaments, come from Germany, and, we are sorry to add, even pen-knives, scissors, and other lines in cutlery; then cheap blankets, what are called "French greys," come from Belgium. We have of late years shipped large quantities of cheap cotton clothing made on the Continent, but we find this can be done now just as well in Great Britain, possibly owing to the cheap labour derived from the influx of Polish Jews latterly.

Speaking of our own experience, we don't know of any lines that the Continental people supply for the native trade.

For the white trade, however, in the South African States, Germany sends out most of the albums, purses, pipes, toys, and things of that class. Fancy goods, they are called. We never ship foreign goods when English goods will do—that is a standing rule, *i.e.*, we give British manufacturers the preference, all things being equal. If all our contemporaries would do the same we should hear less about German and other foreign goods in our Colonies.

(No. 5.)

The statistical returns made up by the Customs Department allow the goods to be classed only by the country to which the port of shipment whence they left for South Africa belongs, and allow of no judgment being formed of what actually was the country of production.

Thus, to accept the statistical returns as giving the figures of the trade between, say, Natal and Great Britain and the various Continental States, would be very misleading.

NATAL.

Some years ago neither the Castle or Union Line called at a Continental port direct; all goods then imported appeared as coming from the United Kingdom. Now that these Lines call regularly in German and Belgian ports, and that the German Line is also bringing goods direct from Continental ports, these imports appear as coming from the various Continental States, thus making it appear that a diversion of trade had taken place, whereas merely the same trade is carried on by a directer route.

According to the statistical returns of the Customs Department, published in the Gazette of the 28th January, under the heading "Ships entered inwards," no goods have been imported from Austria and only 1,953*l.* worth from France.

Now it is evident that the French brandy alone imported here must be considerably in excess of the total value put down for goods imported from France; and the trade would appear to have been considerably deviated in favour of France should in future these imports reach here with direct steamers, and appear under another heading in consequence, though no British manufacturer or trader would have lost thereby.

Austrian bentwood furniture is well known to be a considerable article of import, yet no Austrian goods appear in the import statistics, as they are evidently included in the import figure from the United Kingdom or Germany, and it would in no way be a displacement of other goods if in future these Austrian manufactures were to reach the South African markets by another route and thus obtain a name in the import lists, from which they are at present absent, though it would then appear, from statistical information, that the trade of Austria had obtained a considerable increase to the cost of other suppliers.

I could largely increase these few examples, which I have taken the liberty to enumerate; and I request that I may be pardoned for having specially mentioned these points, as considerably affecting the whole question, though I must feel convinced that this matter has already had your attention, and has not escaped the notice of the Government.

(No. 6.)

We would gladly give you the information desired, but we are not importers, only acting as shipping agents and commission merchants for up-country clients. However, we are in addition produce brokers, and we think it only right that your attention should be drawn to the very serious question affecting the English trade.

Roughly, about 70,000 bales of wool and mohair are shipped from this port every year. Of this quantity over two-thirds is shipped direct to Continental firms. You might say that your customs returns ought to show you this, but it cannot do so, as we know that in most cases the wool on leaving here is shipped to London, but the shippers have the right to send it on to the Continent, which right in most instances they avail themselves of, although your returns would only show so much wool shipped to London.

In former years all our colonial produce was bought by representatives of English firms. At present our largest buyers are representatives of Continental firms; in fact, at the present moment out of the eight firms who buy wool and mohair, six of them buy only for the Continent.

Nearly all the wool and produce exported from Natal is sold in our local market, very little of it being shipped by original farmers, storekeepers or merchants, as it has been proved that the prices realised here have been, and are (taking the average of the last three years) above parity of London prices. The main reason for our being able to obtain higher prices in proportion than obtain in London, is, that manufacturers on the Continent by purchasing in our local market, and having the produce shipped direct to them, thereby save all the London charges which they would incur if they purchased in the London market, and those charges are very heavy.

Although this information is not exactly what you have asked for, still, as it bears on loss of trade to the mother country, we think it may be desirable.

(No. 7.)

We are in receipt of your favour of the 2nd instant relative to the question of trade with imports from foreign countries, and in reply beg to report on the following:—

German Beer.—This being a lighter beer is more suitable for the country, and therefore meets with a greater demand than that of British manufacture. Advantages are gained by its neatness and care in packing, rendering breakage less and freight cheaper, thereby making its competition easy.

Methylated Spirit.—This can be imported cheaper from Germany, and at prices below the locally manufactured article.

Bottles.—The German make of these are much stronger and cheaper than any that can be got from England.

(No. 8.)

In reply to your communication of 2nd instant, with two enclosures (one a copy of despatch from the Right Hon. the Secretary of State for the Colonies, and the other a statement prepared by Collector of Customs).

On referring to copy of despatch with a list of commodities I find that my importations do not amount to 500*l.* on any one article in a year, but think I can safely say in a general way that 10 per cent. of my importations are German goods, some direct from Germany and others from London.

With this I forward you labels of various goods which I stock, and can send samples of the goods themselves should you so desire.

No. 1. Ribbon.
„ 2. Cotton hose.
„ 3. Braid.
„ 4. Galon.
No. 5. Embroidered collars.
„ 6. Laces.
„ 7. Toy books (shows designed in England and printed in Holland).

We also import German boots and shoes, millinery goods, baskets, dolls, &c.

(No. 9.)

With reference to your letter of 21st instant, we notice that the despatch refers to importations during the years 1884, 1889, and 1894, during which time we did little or nothing with foreign manufacturers, but we may mention that during the present year we have found it necessary to import cement, girders, nails, glass, zinc, rolled brimstone, fencing wire, fencing standards, wire nails, &c., from Germany and Belgium, as we find they come cheaper than from the United Kingdom.

(No. 10.)

Although a large proportion of the goods we import are not of British manufacture, there are only one or two articles where foreign goods might be said to have supplanted the former, and with us these are of very little importance. The classes of goods affected chiefly are hardware, soft goods, cement and glass ware, in which we are not interested, except in the case of the last mentioned, and only in a small degree.

(No. 11.)

LIST of GOODS imported from COUNTRIES other than the UNITED KINGDOM or BRITISH POSSESSIONS.

Beer.—From Germany. Lager beer in bottles. This is a light beer well suited for hot climates, preferred to the heavier English ales, and finds large favour largely on account of a good proportion of German residents in this country. It is made up neatly in white and black bottles, well compactly packed in cases of 4 doz. quarts, costing net in bond from 5*s.* 3*d.* to 7*s.* 2*d.* doz., and six doz. pints from 3*s.* 4*d.* to 4*s.* 8*d.* doz.

Butter.—Viâ England from Sweden and Italy. Various brands in 1, 2, 14, and 28 lb. tins. The quality is generally very good and can be depended on to keep in this climate for a reasonable length of time. Costs in bond net from 1*s.* 2*d.* to 1*s.* 8*d.* per lb., according to quality and size of tins.

Carriages.—From the United States. Generally of light construction, well suited for bad roads and colonial requirements all round.

Cheese.—Viâ London from Holland. The Dutch Gouda is generally in favour from its cheapness and suitability for keeping in warm climates, packed one or four in a box, without filling of any kind. The boxes are ventilated and it costs in bond usually about 6½*d.* to 7½*d.* per lb., according to season.

Clocks.—From the United States chiefly. Low-priced, one and eight day strikers and with alarms have ready sale. Made up in stylish wood frames and nickel cases, generally considered good time-keepers and moderate in cost.

MAURITIUS.

No. 18.

ACTING GOVERNOR KING-HARMAN to MR. CHAMBERLAIN.

(Received July 31, 1896.)

Government House, Mauritius,
June 30, 1896.

SIR,

I HAVE the honour to acknowledge receipt of your despatch of 28th November 1895, upon the subject of the mutual trade of the United Kingdom and the Colonies.

2. Your despatch was referred by Sir H. Jerningham to the Chamber of Commerce, with which body the Collector of Customs was instructed to associate himself for the examination of the several points raised by you.

3. The Collector having prepared a return of trade statistics in accordance with paragraph 3 (*a*) of your despatch, a committee of the Chamber of Commerce was appointed for the consideration of the general question. The conclusions of the committee have been embodied in a report which was presented to the Chamber, and adopted at a meeting held on the 19th instant.

4. I have the honour now to transmit copy of that report, from which you will see that the mutual trade of the United Kingdom and British Possessions and this Colony is in a satisfactory condition.

I have, &c.,
C. A. KING-HARMAN,
Administering the Government.

Enclosure in No. 18.

MAURITIUS CHAMBER OF COMMERCE.

TRADE STATISTICS, 1884, 1889, 1894.

Report of the Committee of the Chamber of Commerce (open to all members) appointed to examine and report on the above question, in accordance with the despatch of the Right Honourable the Secretary of State for the Colonies, under date the 28th of November 1895.

PRESENT:

The Honourable Hamilton Stein (President).
C. F. H. Adam, Esq. (Vice-President).
J. Fraser, Esq., C.M.G.
Robt. Freeland, Esq.
Fred. Nash, Esq.
Jh. Coutanceau, Esq.

Also in attendance:

The Honourable James J. Brown (Collector of Customs).

Taking for basis of this report the Blue Book returns for the years under review (1884, 1889, 1894), and the statement of the Honourable the Collector of Customs, prepared in accordance with the recommendations of the Right Honourable the Secretary of State for the Colonies,

Your Committee arrive at the following conclusions :—

	1884.	1889.	1894.
(A) Values of total imports for the years	Rs. 29,631,519	Rs. 27,927,003	Rs. 32,852,313
Of which from United Kingdom	6,924,302	7,092,914	7,558,532
„ from British Possessions	13,443,911	12,793,947	18,677,772
Together	20,368,213	19,886,861	26,236,304
„ from Foreign Markets	9,263,306	8,040,142	6,616,009
Totals	29,631,519	27,927,003	32,852,313
(B) Percentage of total imports	29,631,519	27,927,003	32,852,313
	Per cent.	Per cent.	Per cent.
United Kingdom and British Possessions	68·74	71·21	79·86
Foreign	31·26	28·79	20·14
	100·00	100·00	100·00

Forming a group of those foreign markets which supply the Colony with commodities exceeding 1 per cent. of total imports, we arrive at the following comparison :—

	1884.	1889.	1894.
(C) Percentage of total imports	Per cent. 31·26	Per cent. 28·79	Per cent. 20·14
Foreign markets :—			
France	16·14	14·24	10·12
Germany	4·87	0·35	0·42
Madagascar	3·43	2·39	1·21
Peru	2·37	6·18	Nil.
Chili	Nil.	Nil.	1·57
Pondicherry	1·73	1·80	1·83
Other countries	2·72	3·83	4·99
	31·26	28·79	20·14

And analysing this group in respect to the extent to which each foreign market contributes compared with total foreign imports, we obtain the following percentages :—

	1884.	1889.	1894.
(D) Percentage of total foreign imports	Rs. 9,263,306	Rs. 8,040,142	Rs. 6,616,009
	Per cent.	Per cent.	Per cent.
France	51·63	49·46	50·23
Germany	15·60	1·21	2·06
Madagascar	11·00	8·32	6·00
Pondicherry	5·52	6·27	9·08
Peru	7·59	21·48	Nil.
Chili	Nil.	Nil.	7·77
United States	1·17	1·11	1·46
China	·44	Nil.	4·73
Réunion	2·40	3·46	7·13
Johanna	1·73	3·31	5·85
Various states and countries	2·92	5·38	5·69
	100·00	100·00	100·00

For all practical purposes it seems unnecessary to prosecute any further our inquiries as to the markets which chiefly affect, in this Colony, the importation of British produce and manufactures. From the preceding tables it will be seen at a glance that so far

MAURITIUS. from foreign imports displacing importations from the United Kingdom and British Possessions, quite a contrary course has steadily progressed, and we find that whereas—

In 1884—

Imports from the United Kingdom and British Possessions amounted to - - - - - - 68·74 per cent of total.
Against imports from foreign markets of - - 31·26 „ „

In 1894—

British produce and manufactures had increased to - 79·86 „ „
Against imports from foreign markets of - - 20·14 „ „

In other words, foreign importations had decreased during the decade in question to the extent of fully 35 per cent.

II.

Following up the analysis, and selecting those foreign markets which in 1894 contributed 20·14 per cent. of total importations, France and her Indian Possession of Pondicherry stand out prominently as contributing by far the greater proportion of foreign imports, amounting, in point of fact, to approximately 60 per cent. of total foreign importations. (*Vide* Table D.)

FRANCE.—In respect to the importations from France, representing over 50 per cent. of total foreign importations, it is scarcely surprising to find this to be the case, nor can it be wondered at when a right appreciation is formed of the origin of the tastes of the majority of the European population.

Excluding from our consideration the item of. . . . . Wine, which may be said to be imported exclusively from France (actual figures show that, of total importations during 1894 amounting to Rs. 1,026,656—Rs. 1,004,725 (98 per cent.) were received from France), we find that, amongst other imports, the following occupy leading positions :—

PRINCIPAL IMPORTATIONS from FRANCE as per CLASSIFICATION of Right Honourable SECRETARY of STATE for the COLONIES.

	1884.	1889.	1894.	1894 Compared with 1884.
Value in Rupees - - -	Rs.2,742,555	Rs.2,221,371	Rs.1,965,191	—
Value in Sterling - - - -	£209,355	£121,386	£109,177	—
	Per cent.	Per cent.	Per cent.	Increase or Decrease, Per cent.
Haberdashery - - - -	10·72	14·04	22·16	+ 106
Machinery - - - -	10·21	0·77	2·38	— 77
Leather (wrought) - - - } Boots and shoes - - - - }	9·00	10·29	7·59	— 16
Spirits (brandy) - - -	7·00	6·43	7·79	+ 11
Manures (other than guano) - -	6·11	3·37	1·25	— 80
Do. (guano) - - -	5·20	0·35	Nil.	— 100
Hardware and cutlery - - -	4·30	6·40	5·53	+ 29
Preserved provisions - - -	3·72	3·57	2·71	— 27
Woollen mixed with silk - -	3·47	6·10	6·27	+ 80
Chemical products - - - (Superphosphate of lime) - -	3·47	4·90	0·82	— 76
Apparel and slops - - -	2·50	2·27	1·41	— 43
Butter - - - - -	2·46	3·63	3·74	+ 52
Perfumery - - - -	2·36	2·77	3·29	+ 40
Provisions (lard) - - - -	2·17	4·38	2·67	+ 23
Plate and plated jewellery - -	1·94	2·57	2·96	+ 52

COMPARISONS of STERLING VALUES of principal IMPORTATIONS from FRANCE.

	1884.		1894.		1894 Compared with 1884.
	£	Per cent. of Total Imports	£	Per cent. of Total Imports.	Increase or Decrease, Per cent.
Haberdashery	23,283	57·14	24,202	47·82	— 16
Machinery	22,167	50·59	2,599	13·13	— 74
Leather (wrought) and Boots and shoes	21,103	87·23	8,282	73·23	— 16
Spirits (brandy)	15,026	94·37	8,511	96·16	+ 2
Manures (other than guano)	13,263	55·54	1,360	1·88	— 96
Do. (guano)	11,288	4·95	Nil.	Nil.	— 100
Hardware and cutlery	9,388	13·69	6,035	15·29	+ 12
Preserved provisions	8,077	71·15	2,957	52·02	— 27
Woollen mixed with silk	7,548	41·53	6,844	47·00	+ 13
Chemical products (Superphosphate of lime)	7,546	15·27	893	11·74	— 23
Apparel and slops	5,432	27·84	1,545	16·24	— 42
Butter	5,353	44·88	4,089	52·24	+ 16
Perfumery	5,129	85·44	3,594	82·48	— 3
Provisions (lard)	4,731	21·54	2,913	13·32	— 38
Plate and plated jewellery	4,227	81·30	3,232	73·53	— 9

COMPARISONS of PRINCIPAL IMPORTS from FRANCE with TOTAL IMPORTS of SIMILAR CHARACTER for the Years 1884 and 1894.

	Total Imports.			Imports from France.		
	1884.	1894.	Increase or Decrease.	1884.	1894.	Increase or Decrease.
	£	£	Per cent.	£	£	Per cent.
Haberdashery and millinery	40,748	50,605	+ 25	23,283	24,202	+ 4
Machinery	43,810	19,789	— 55	22,167	2,599	— 88
Leather, boots and shoes	24,193	11,309	— 53	21,103	8,282	— 60
Spirits (brandy)	15,921	8,850	— 44	15,026	8,511	— 43
Preserved provisions	11,351	5,684	— 50	8,077	2,957	— 63
Woollen mixed with silk	18,173	14,560	— 20	7,548	6,844	— 9
Chemical products :— (Superphosphate of lime)	49,424	7,607	— 85	7,546	893	— 88
Apparel and slops	19,512	9,511	— 51	5,432	1,545	— 71
Butter	11,926	7,827	— 34	5,352	4,089	— 23
Perfumery	6,003	4,358	— 27	5,129	3,594	— 30
Provisions, lard	21,968	21,854	— 0·52	4,731	2,913	— 38
Plate and plated jewellery	5,199	4,395	— 15	4,227	3,232	— 23
Hardware and cutlery	68,171	39,471	— 42	9,388	6,035	— 35

MAURITIUS.

Eliminating from these lists those articles which by force of habit, or taste of the people, have been for long years, and continue to be, imported from France by preference, viz.:—Haberdashery, boots and shoes, apparel and slops, spirits (brandy), preserved provisions, butter and lard, perfumery, plate and plated jewellery, we find the following alone calling for special reference, and in respect to both of these, there has been a marked falling off in actual percentage of foreign importations during the ten years under review.

Machinery.—Total foreign imports of this article, which in 1884 represented 50·73 per cent. of total imports, had in 1894 fallen to 13·13 per cent.; and in respect to receipts from France had declined from 10·21 per cent. to 2·38 per cent. of total importations from that country.

Official returns establish the following comparison :—

Value of Total Importations.			Value of Importations from Foreign Countries.		
1884.	1889.	1894.	1884.	1889.	1894.
£ 43,810	£ 16,327	£ 19,789	£ 22,231	£ 1,180	£ 2,599

Hardware and Cutlery.—Total foreign imports under this head also show a shrinkage to the extent of 27 per cent. during the ten years' period under review; for we find that, whereas in 1884 the percentage of total foreign imports compared with total imports stood at 22·79 per cent., in 1894 it had declined to 16·62 per cent.

Actual figures afford the following comparison :—

Value of Total Importations.			Value of Importations from Foreign Countries.		
1884.	1889.	1894.	1884.	1889.	1894.
£ 68,174	£ 67,663	£ 39,471	£ 15,559	£ 10,479	£ 6,574

PONDICHERRY.—As to Pondicherry, which in 1894 contributed 9·08 per cent. of total foreign imports, we have to remark that the supplies drawn from this market consist almost exclusively of cotton manufactures (coloured) and apparel; but in respect to the former there has been a marked falling off in quantity, and in the value during the years under review (1884, 1889, 1894), the respective values registered according to Custom House Returns being, in 1884 Rs.143,396 in 1889 Rs.100,706, in 1894 Rs.26,481.

Although passed into consumption as imports from Pondicherry, these cottons, we understand, are received originally from the United Kingdom, and undergo a process of dyeing before being re-exported from Pondicherry. They form the principal wearing material of the labouring class of Creoles, and the apparel that of a portion of the Indian population of the Colony.

GERMANY.—Imports from this country, which have declined during the period 1884–94 from 15·60 per cent. to 2·06 per cent. of total foreign importations, scarcely call for special comment, no separate article of importation exceeding in value, during 1894, Rs.10,000 (555*l.*).

UNITED STATES.—In respect to Imports from this market, they continue to be of insignificant proportions, not exceeding 1·46 per cent. of total foreign importations, and consist for the present principally of butter, lard, fish (pickled), and petroleum oil.

PERU, which at one time held a prominent position amongst foreign markets from which supplies were drawn by this Colony, has latterly disappeared entirely from the list, due to the cessation of imports of guano from that country. But it is being replaced by . . . .

CHILI, from which nitrates of soda have during the past two years been imported in increasing quantities.

Of the remaining principal foreign markets, the following may be referred to, but more with a view to filling up an apparent gap in the foreign importations than to imply any competition with British produce or manufactures.

CHINA, in 1894, contributed 4·73 per cent. of total foreign importations, of which the principal items were lard, and matches.

MADAGASCAR, in 1894, contributed 6 per cent. of total foreign importations, of which the principal items were bullocks and Madagascar mat bags (pockets).

RÉUNION, in 1894, contributed 7·13 per cent. of total foreign importations, of which the principal item was potatoes, representing 87 per cent. of total exports from that market to Mauritius.

CONCLUSIONS.

As already pointed out, the foreign trade of the Colony in respect to imports is concentrated in and about France, and for reasons which are obvious. But even in respect to this, there is a gradual shrinkage in favour of British manufactures and commodities, as established in Table B, showing total foreign imports compared with total imports. It may, however, be well to add that, in connection with importations from the United Kingdom and British Possessions, the increase is principally due to supplies drawn from British Possessions.

Viewed generally, the position of the Colony in respect to its sources of supply could, from the point of view of the Right Honourable the Secretary of State, scarcely be more satisfactory, and, we venture to predict, will be found to compare favourably, as regards both its import and export trade, in so far as its dealings with the United Kingdom and its Colonies may be concerned, with any possession of the British Crown.

The following comparative statement will not be without interest, showing as it does the value of the trade interchanged between Mauritius and the United Kingdom, and British Possessions and foreign markets, for the years 1884 and 1894 :—

	Imports.		Exports.	
	1884.	1894.	1884.	1894.
	Rs.	Rs.	Rs.	Rs.
United Kingdom	6,924,302	7,558,532	5,083,317	3,024,592
British Possessions	13,443,911	18,677,772	31,060,462	27,600,283
Foreign Markets	9,263,306	6,616,009	3,273,795	2,765,797
Totals	29,631,519	32,852,313	39,417,574	33,390,672

	Total Overseas Trade.			
	1884.	Of Total.	1894.	Of Total.
	Rs.	Per cent.	Rs.	Per cent.
With United Kingdom	12,007,619	82	10,583,124	86
With British Possessions	44,504,373		46,278,055	
With Foreign Markets	12,537,101	18	9,381,806	14
Totals	69,049,093		66,242,985	

Port Louis, Mauritius,
19th June, 1896.

HAMILTON STEIN,
Chairman.

MAURITIUS.

ANNEXE I.

ARTICLES of IMPORT as per CLASSIFICATION of Right Hon. SECRETARY of STATE for the COLONIES showing INCREASE in percentage of FOREIGN IMPORTATIONS, compared with IMPORTS from UNITED KINGDOM and BRITISH POSSESSIONS.

Classification No.	Description.	Total Importations.		Per cent. of Foreign Importations.		Per cent. of British Importations. 1894.
		1884.	1894.	1884.	1894.	
		Rs.	Rs.			
9	Butter	150,640	140,889	52·89	72·02	27·98
11	Candles	37,812	63,446	68·00	89·21	10·79
23	(*c*) Cottons, hosiery	42,164	31,080	45·49	57·41	42·59
23	(*d*) Cotton thread, sewing	39,753	33,744	13·98	21·60	78·40
34	Leather, unwrought	Nil.	5,915	Nil.	98·86	1·14
49	Provisions, lard	277,485	393,389	28·09	34·54	65·46
34	Leather:—					
	(*c*) Wrought sole	Nil.	14,237	Nil.	7·93	92·07
	(*d*) Wrought of other sorts	65,443	62,189	29·98	63·93	36·07
16	Chemical Products:—					
	(*a*) Lime, phosphate of	Nil.	63,367	Nil.	16·86	83·14
	(*c*) Matches	55,438	109,537	54·42	60·69	39·31
45	Paper:—					
	Printing	Nil.	19,428	Nil.	39·82	60·18
	Hanging	15,383	10,255	71·66	73·67	26·33
46	Pickles and sauces	38,742	1,960	33·79	40·85	59·15
16	Chemical products:—					
	(*e*) Potash, silicate of	Nil.	7,798	Nil.	10·19	89·81
	(*f*) Do. sulphate of	„	20,427	„	50·39	49·61
	(*g*) Potassium, chloride	„	19,183	„	74·94	25·06
	(*h*) Do. sulphate	„	5,005	„	100·00	Nil.
	(*i*) Soda, caustic	„	19,008	„	12·20	87·80
	(*j*) Do. nitrate of	„	181,418	„	100·00	Nil.
57	Spirits, geneva	8,686	20,878	76·81	90·57	9·43
49	(*e*) Provisions, tea	34,503	49,315	1·23	17·49	82·51
44	(*b*) Painter's colors, varnish	Nil.	15,333	Nil.	56·04	44·96
64	(*a*) Wood, wooden casks	6,362	19,805	66·82	75·24	24·76
67	Woollen and worsted manufactures:—					
	(*a*) Woollen blankets	28,147	38,387	19·12	62·34	37·66
	(*b*) Woollen with silk	229,551	262,094	41·75	47·62	52·38
	(*c*) Woollen shawls	24,126	1,314	73·77	86·27	13·73

ANNEXE II.

ARTICLES of IMPORT (as per classification of Right Hon. SECRETARY of STATE for the COLONIES) showing DECREASE in percentage of FOREIGN IMPORTATIONS, compared with IMPORTS from UNITED KINGDOM and BRITISH POSSESSIONS.

Classification No.	Description.	Total Importations.		Per centage of Foreign Imports.		Per centage of British Importations, 1894.
		1884.	1894.	1884.	1894.	
		Rs.	Rs.			
2	Animals (horses)	126,347	157,899	17·89	11·43	88·57
3	Apparel and slops	246,452	171,202	32·99	30·67	69·33
6	Beer and ale	212,236	220,931	16·24	7·71	92·29
9	Books, printed	41,440	50,536	55·78	35·74	64·26
12	Caoutchouc	20,093	14,946	12·61	0·76	99·24
14	Cement	21,643	81,275	58·82	6·48	93·52
15	Cheese	50,657	41,486	21·56	11·38	88·62
19	Cordage and twine	92,613	63,547	12·57	9·21	90·79
23	Cotton manufactures :—					
	(*a*) Coloured	921,175	942,689	20·70	10·18	89·82
	(*b*) Plain	724,100	611,247	7·52	3·51	96·49
24	Earthenware and china	56,487	58,599	64·56	59·79	40·21
25	Fish :—					
	(*a*) Pickled	26,176	35,190	94·99	40·37	59·63
27	Glass :—					
	(*a*) Looking and mirrors	10,584	13,171	90·36	67·34	32·66
	(*b*) Flint and window	10,834	15,954	21·17	16·99	83·01
	(*c*) Of other sorts	35,367	52,341	74·62	50·15	49·85
29	Haberdashery and millinery	514,688	910,895	57·58	49·33	50·67
30	Hardware and cutlery	861,112	710,484	22·79	16·62	83·38
31	Hats :—					
	(*a*) Felt	36,043	62,602	99·99	51·12	48·88
	(*b*) Silk	2,485	2,161	97·54	58·90	41·10
	(*c*) Straw	16,128	19,917	62·40	17·57	82·49
40	Metals, iron nails	52,228	72,095	13·36	10·98	89·02
48	Plated ware, jewellery	65,670	79,117	81·84	78·76	21·24
34	Leather, wrought :—					
	(*b*) Boots and shoes	305,583	203,573	82·27	73·76	26·24
16	Chemical products :—					
	(*b*) Superphosphate of lime	624,345	136,929	15·26	12·40	87·60
37	Machinery	553,372	356,202	50·73	13·13	86·87
38	Manures :—					
	(*a*) Guano	2,879,512	201,917	75·15	Nil.	100·00
	(*b*) Of other sorts	302,740	1,297,360	55·68	14·07	85·93
41	Musical instruments	20,692	14,114	86·33	76·13	23·87
44	Painters' colours and materials	144,259	130,809	14·24	4·18	95·82
10	Chemical products :—					
	(*d*) Perfumery	75,826	78,459	85·87	82·88	17·12
49	Provisions, pork (salted)	49,561	23,983	31·13	9·72	90·28
9	Books printed :—					
	(*b*) Prints and engravings	11,830	11,902	79·61	71·88	28·12
49	Provisions :—					
	(*d*) Preserved	143,382	102,316	72·38	63·41	36·59
52	Seeds, garden	2,985	12,515	89·11	29·64	70·36
54	Silk manufactures :—					
	(*a*) Silk and satin ribbons	98,061	25,459	50·62	40·72	59·28
57	Spirits (brandy)	201,105	159,309	97·02	76·17	23·83
58	Stationery	184,575	198,748	36·27	25·69	74·31
63	Umbrellas and parasols :—					
	(*a*) Cotton	24,070	44,254	54·77	24·62	75·38
	(*b*) Silk	53,641	16,163	91·73	59·71	40·29
46	(*b*) Vinegar	16,555	7,163	98·75	98·67	1·33
49	Provisions :—					
	(*f*) Vermicelli and macaroni	9,042	7,969	93·89	78·52	21·48
64	Wood, woodenware	9,926	32,637	38·34	32·95	67·05

No. 19.

ACTING GOVERNOR SIR E. NOEL WALKER to MR. CHAMBERLAIN.
(Received February 25, 1896.)

The Pavilion, Kandy, Ceylon,
February 1, 1896.

SIR,

IN compliance with the instructions contained in your despatch dated the 28th November last, I have the honour to transmit a letter from the Principal Collector of Customs accompanying the return therein desired, respecting the imports into Ceylon from foreign countries and from the United Kingdom.

2. In view of the request contained in the concluding paragraph of your despatch, and as Mr. Lee, by whom this statement was prepared, proceeded on leave of absence on the 30th ultimo, I forward the information at once in the form in which it has reached me, without the scrutiny and the observations which may be called for.

I have, &c.,
E. NOËL WALKER.

Enclosure in No. 19.

TRADE RETURN FOR THE COLONIAL OFFICE.

Her Majesty's Customs, Colombo,
January 29, 1896.

SIR,

I HAVE the honour to furnish the returns and report required by your letter of the 21st December last.

2. The accompanying statements include the particulars of those articles which come within the definition prescribed in Mr. Chamberlain's despatch. There are, however, a very large number of imports which pass through Great Britain and are included in Colonial statistics as British, although the place of their manufacture is America or the Continent of Europe.

3. The reason for the preference of the foreign article to similar goods of British manufacture is to be found in the lower price of the foreign article, as well as in the greater suitability of the foreign article to the native taste.

4. In the market for hardware and cutlery the foreign article is preferred, not because the goods are of superior or even of equal quality with those of British manufacture, but because the foreign article is cheap and suits the Oriental taste. The lamp of German manufacture is flimsy and of inferior make, but it is cheap and showy in design, and in face of the bad usage to which it will inevitably be subjected, it is as good as the British lamp of much higher price.

5. In cotton goods (which are not represented in the accompanying statement, because the value of the foreign imports is not shown in the Customs statistics as being 5 per cent. of the total imports) Continental products have displaced articles of British manufacture, because the British manufacturer refuses to produce the goods of the quality and price required by the native market. In sarongs, camboys, handkerchiefs, Turkey red cambrics, and Turkey red yarn, British manufactures have never held a prominent position, cheap Continental labour allowing the manufacture of articles suited to the native market at a price below that at which the British manufacturer can sell at a profit. In these goods the Continental manufacturers provide a variety of design and of colour which meet the native requirements.

The large Manchester staple goods, such as grey and white shirtings, prints, &c., still hold the market, and there seems to be no chance of their displacement.

6. It is contended that there has been no general displacement of British manufactures by Continental goods, but that the introduction of the Trade Marks Act has awakened the public to the fact that a large number of articles which were looked upon as of British manufacture were really Continental, introduced because the greater cheapness of Continental labour permitted of their production at a lower price. This contention is supported by the fact that the proportion of foreign to British imports has hardly varied since 1886, ranging (grain, kerosine oil, and specie being excluded) from five to six per cent. of the total imports.

7. In some goods, such as iron and cement, there has certainly been an actual displacement, consequent on the establishment of direct Continental lines of steamers,

giving a great impetus to Continental manufacture, by bringing the maker and consumer into direct contact.

8. In matches, a few years have witnessed almost a revolution. Bryant and May's matches, which at first entirely occupied the market, gradually gave way to matches of Swedish manufacture, and these again are being rapidly replaced by cheaper and inferior products of Japanese invention, the cost of these being from fifteen to twenty per cent. lower in price.

9. The import trade generally of the Colony, except in the case of five large retail firms, is either in the hands of foreign firms, who naturally favour foreign manufactures, or of native middlemen, who convey orders to agents in London, who obtain the goods from Continental manufacturers. It does not appear that any useful purpose will be served by obtaining patterns of these goods, for they can equally well be obtained from the London agents, in whose hands the trade now almost entirely rests. The firms which do the European retail trade deal no more in Continental goods than do firms of the same class in London. The goods which are supplied from the Continent to native traders are such as are not to be found in English markets.

10. A large quantity of Continental goods is now carried direct from Antwerp and Trieste by the steamers of the Nord Deutscher and Austro-Hungarian Lloyds, but information as to the rates of freight is not obtainable, as I am informed by the Chamber of Commerce, the rates being paid in London. Details can probably be easily obtained in London.

11. A large market for food products of Australian manufacture exists in Ceylon, but labours under certain disadvantages. The goods are not sufficiently well cured or packed to stand the climate, and the cost of freight is 33 per cent. higher from any part of Australia than from any European port. An improvement in the means of communication between the Australian Colonies and Ceylon would mean a development of trade of mutual advantage. The carriage of goods is now practically limited to three companies, exercising a monopoly, which can only be avoided by sending goods to Calcutta for transhipment at uncertain periods.

12. The information which is to be found in these papers has been obtained in conference with the Chamber of Commerce, and in interviews with the majority of the merchants, and in correspondence.

I am carrying with me the notes which I have made, as well as statistical returns of the exports and imports for the three periods, and I hope that I may be allowed to supply in England any deficiencies which may be found in this report, as well as any other information which may be required in furtherance of Mr. Chamberlain's wishes.

I am, &c.,
LIONEL LEE,
Principal Collector.

STATEMENT referred to in PARAGRAPH 2 of LETTER of 29th January 1896.

No.	Commodity.	Year.	Total Value of Importation.	Value of Importations from Foreign Countries.		Remarks.
	Arms and ammunition:		Rs.		Rs.	
4	(a) Fire-arms (small).	1884	10,075	Nil	—	The figures do not represent the true value of foreign imports. There is a small quantity of single and double-barrelled fire-arms of a cheap description imported from England, said to be made up of old barrels and new stocks; but, with the exception of a small number of highly-priced double-barrelled guns imported from the best English makers, all the guns are of Liège manufacture, running some two or three shillings cheaper per barrel than anything procurable in the English market. These cheap articles are always procurable in the Belgian market in any quantity, but difficulty is found in obtaining them in England, and an order is not readily accepted. Rifles and revolvers are imported of Colt's manufacture from America. Pistols of cheap description of German make are found in the native shops.
		1889	25,425	Belgium - -	3,090	
				France - -	420	
				Germany - -	765	
		1894	40,049	Nil	—	

CEYLON.

No.	Commodity.	Year.	Total Value of Importation.	Value of Importations from Foreign Countries.		Remarks.
	Arms and ammunition —*cont.*		Rs.		Rs.	
4	(*c*) Shot - -	1884	14,662	Nil	—	Information is not obtainable of the circumstances under which shot has been imported from France.
		1889	11,918	France - -	4,125	
		1894	19,776	France - -	4,800	
6	Beer and ale - -	1884	163,891	Nil	—	The largest consumers of beer and ale in the Colony are the troops, who drink ale of English manufacture. The value of beer and ale consumed by the troops in 1894 may be taken as Rs. 145,597, leaving a sum of Rs. 119,422 as representing the consumption by the general public, of which rather more than Rs. 105,000 represent foreign imports. This is almost entirely Pilsener, manufactured at Beck's Brewery in Hamburg. English ale is found to be too heavy, and what is wanted for the local market is a light ale. An attempt has been made by Tennant's Brewery to supply the want, but for some reason it does not satisfy the taste, which accepts what is said to be the result of a compound of liquor ignorant of malt and hops, brewed from rice and mixed with various chemicals. Some years ago an experiment was made with ale brewed in Victoria, Australia; but although it was found to be otherwise suitable, the climate speedily rendered it undrinkable. German beer would probably be easily displaced if an English ale of light gravity not higher in price could be supplied. I understand that an attempt is now being made to supply this want by what is called "Wrexham Lager," which will not exceed in price the German ale.
		1889	256,707	Germany - -	78,675	
				Austria - -	3,007	
		1894	264,919	Germany - -	102,292	
				Austria - -	616	
				Belgium - -	2,817	
7	Biscuits and bread -	1884	74,760	Nil	—	A small demand exists for foreign biscuits of inferior quality, about 10 per cent. cheaper than the article of English manufacture, and put up in showy boxes. The consumption is confined to the native trade. The demand is not increasing, the comparative superiority of the English product asserting itself.
		1889	55,670	Germany - -	20,032	
		1894	80,887	Germany - -	5,731	
10	Butter - -	1884	31,418	Nil	—	The Normandy butter, which at first held the market, was altogether displaced between 1889 and 1894 by butter from Denmark. This yielded to imports from Italy, but the market is now supplied to a large extent from Bombay. Traders report that the quality of Bombay butter is rapidly deteriorating, and it is probable that the market will again be held by the butter from Denmark and Italy. Australian butter has been imported in some quantity, but it is of very varying quality and does not stand the climate, and the high rate of freight goes against it. Italian butter is 74*s.* a case f.o.b., to Danish at 120*s.*, and 60*s.* Indian.
		1889	52,310	France - -	7,806	
				Italy - -	4,187	
				Germany - -	1,283	
		1894	183,707	Italy - -	27,173	
				Germany - -	21,895	
				Austria - -	4,113	
14	Cement - -	1884	130,709	Nil	—	The improvement in the character of the houses occupied by natives of even a comparatively low position has created a large demand for this material. This demand is satisfied by an article of inferior quality and lower price to the English manufacture, the foreign being 1*s.* 9*d.* per barrel (400 lbs.) cheaper than the English. It is certain that the demand is steadily increasing, and it is asserted that the quality of the foreign product is as steadily improving. When it is considered how large a part of the present importation is consumed in public works using only English cement, it will be seen how great a portion of the general consumption is of foreign origin. Foreign imports are encouraged by the lowness of freight from Genoa and Trieste.
		1889	133,987	Austria - -	12,934	
				France - -	29,487	
		1894	191,095	Belgium - -	19,218	
				France - -	2,812	
				Germany - -	12,889	
18	Clocks and watches -	1884	23,310	Nil	—	Of these articles the description is of inferior quality and low price. The market has been altogether held by the American manufactures of the Waltham manufactory, but there has been recently an importation from France of a strong description at a low price. The market for watches and clocks of superior description of the English manufacture is very small, and the few purchasers of such articles supply their wants by orders direct to England.
		1889	29,139	Nil	—	
		1894	57,412	France - -	3,844	
				Germany - -	118	

No.	Commodity.	Year.	Total Value of Importation.	Value of Importations from Foreign Countries.		Remarks.
			Rs.		Rs.	
22	Cotton yarn - -	1884	253,799	Nil	—	I am informed that the exports from Austria represent English yarn imported into Austria, dyed there, and re-exported from Trieste. The foreign manufacturer finds his profit in the additional weight given to the yarn by the dye.
		1889	166,228	Austria - -	65,880	
		1894	157,405	Austria -	46,800	
24	Earthen and china ware.	1884	159,574	China - -	285	The information which I have obtained goes to show that the native taste is better consulted by the foreign than the English manufacturer, and that the foreign article is not necessarily of lower price. A complaint is made of the conservatism of the English manufacturer and of his reluctance to alter his style. Invitations to supply local requirements have been made and refused, and the market is satisfied from the Dutch manufactories.
				France - -	55	
				French India -	7,836	
		1889	187,799	China - -	10,848	
				France - -	905	
				French India -	8,136	
				Germany - -	545	
				Belgium - -	2,208	
		1894	198,335	China - -	1,774	
				France - -	338	
				French India -	4,938	
				Germany - -	3,088	
				Belgium - -	6,772	
				Japan - -	538	
26	Furniture - -	1884	36,943	Nil	—	The furniture imported from Austria and Germany is the bentwood furniture, which is not, so far as I can ascertain, made in England. China and Japan supply a small quantity of cane chairs, but the market is being gradually supplied by articles of local manufacture.
		1889	74,196	Austria - -	665	
				China - -	2,436	
				France - -	488	
				Germany - -	190	
		1894	61,771	Austria - -	4,352	
				Belgium - -	700	
				China - - -	1,984	
				France - -	1,577	
				Germany - -	2,051	
				Japan - - -	754	
	Lamps - - -	1894	48,989	Austria - -	1,565	In lamps the native market is almost entirely occupied by articles of foreign manufacture, distinctly inferior in quality to the English product, but considerably lower in price, but showy and better suited to the native taste.
				Germany - -	13,531	
27	Glass:					
	(*a*) Glass plate, rough or silvered.	1894	25,078	Germany - -	3,947	The finest plate glass is of English manufacture, but all other kinds of glass imported are foreign. Bohemia has always supplied the bulk of local requirements to the exclusion of the finer descriptions, whether of English or foreign make. Tumblers of this make are supplied at 2*s.* 8*d.* per dozen to the English 3*s.* 6*d.*, and this may be taken as an index to the prices of other articles. Medicine bottles are, as a rule, of English make, being of a finer description, more neatly made than the foreign article.
	(*d*) Glassware of other sorts.	1894	92,732	Austria - -	1,914	
				Belgium - -	594	
				France - -	737	
				Germany - -	6,590	
40	Metals:					
	(*a*) (*f*) Iron hoop	1894	135,206	Belgium - -	4,175	German hoop iron 25 and 26 B.W.G. is 1*l.* per ton cheaper than the English, and as serviceable. Zinc sheets are supplied at 18*l.* per ton f.o.b. at Antwerp. Wire nails at 7*s.* per cwt. are peculiar to Belgium. Belgian bars at 4*l.* 12*s.* 6*d.*, and rolled joists at 4*l.* 7*s.* 6*d.*, are products of which the cheapness recommends them. The thin hoop iron which is used for the fastening of tea chests is manufactured, as I understand, only in Belgium, but Staffordshire still supplies the stouter makes.
				Japan - -	2,256	
				Germany - -	5,838	
	(*a*) (*b*) Iron nails	1889	84,437	Belgium - -	16,500	
		1894	83,694	Belgium - -	16,478	
	(*b*) (*b*) Copper sheathing	1894	13,768	Germany - -	2,595	
	(*f*) Zinc ware -	1889	10,194	Belgium - -	1,079	
		1894	8,854	Belgium - -	2,249	
				Germany - -	695	

CEYLON.

No.	Commodity.	Year.	Total Value of Importation.	Value of Importations from Foreign Countries.		Remarks.
			Rs.		Rs.	
41	Musical instruments	1884	68,211	Nil	—	The foreign imports are almost entirely pianos of the Haake manufactory, imported on account of their greater cheapness by the one firm in the island which now imports pianos.
		1889	35,288	Nil	—	
		1894	41,359	Germany - -	8,897	
44	Painters' colors and materials.	1894	52,866	Austria - -	1,470	
				Germany - -	1,971	
45	Paper (other than hangings).	1884	185,657	Nil	—	The foreign paper of ordinary description is considerably cheaper than that of English manufacture and suits the local market, where expensive paper of higher quality is not required. There is a distinct growth in the foreign trade, which is probably accounted for by the spread of education and increased postal facilities creating a larger native demand. The German manufactures are, however, being gradually supplanted by the Indian paper mills.
		1889	132,162	France - -	336	
				Austria - -	9,210	
				Germany - -	948	
		1894	183,325	France - -	384	
				Austria - -	6,885	
				Germany - -	8,277	
47	Pictures - - -	1894	8,998	China - -	250	
				Germany - -	909	
48	Plated and plated ware.	1889	27,824	France - -	561	The plated ware of German importation is a very inferior description of spoons and forks, and suiting only the wants of the lower native market.
				French India -	240	
				Austria - -	877	
				Germany - -	253	
		1894	47,285	France - -	691	
				Germany - -	2,334	
56	Soap - -	1889	88,699	Austria - -	3,822	The foreign imports of this article are entirely confined to the native market, where they are welcomed on account of their cheapness and by reason of the greater variety of design and colour.
				French India -	1,442	
				Germany - -	9,456	
		1894	127,516	Austria - -	879	
				Germany - -	8,007	
57	Spirits: Brandy - -	1884	100,329	Nil	—	The imports of brandy are almost entirely of French brandy, and of gin from Holland. Little English-made gin is imported. That imported is almost entirely Dutch Hollands in square bottles, which is largely consumed by natives of the higher class in preference to arrack.
		1889	59,846	France - -	3,029	
		1894	108,497	France - -	17,939	
	Gin - - -	1884	148,614	Nil	—	
		1889	188,276	Nil	—	
		1894	113,117	Germany - -	37,812	
				Holland - -	14,024	
67	Woollen manufactures.	1884	153,365	Germany - -	19,897	Native requirements are supplied by articles of Saxon manufacture lighter in material and cheaper in price than those of British make. The accompanying samples have been brought to me as indicative of the difference between the continental and British manufacture of articles as well of this class as of others which have been dealt with in these papers. The British manufacture is superior in quality and better in finish and more lasting in material, but it is higher in price and must therefore give way to the foreign article of inferior description, but cheaper in price and not less satisfactory in appearance.
		1889	215,389	Nil	—	
		1894	188,686	Nil	—	

STRAITS SETTLEMENTS.

No. 20.

SIR C. B. H. MITCHELL to MR. CHAMBERLAIN.

(Received April 27, 1896.)

Government House, Singapore,
March 30, 1896.

SIR,

REFERRING to your despatch of the 29th November last, relative to foreign trade, I have the honour to forward six copies of a printed report of the Registrar of Imports and Exports on the subject.

2. The transit trade of Singapore has been greatly affected by the establishment of subsidised steamers of foreign lines, as for instance, the Messageries Maritimes Line, the North German Lloyd Line, the Austrian Lloyd Line, and the Netherlands Steamship Company's Line. These lines convey goods from the continent of Europe to the East, and back from the East to the continent of Europe, which used formerly to go to Great Britain, and from thence found their way to and from the East.

3. The Netherlands Line now takes between Batavia and Holland direct goods, some of which used to be transhipped at Singapore, and the Messageries Line takes directly between Saigon and Europe many goods which used to be stored at Singapore.

4. Singapore has, moreover, suffered from the adoption, on 13th January 1893, in French Indo-China, by orders from France, of the customs tariff formulated for the mother country, especially by the fact that goods unloaded or stored in Singapore have, by a construction which the law will hardly bear, been subjected to the maximum tariff instead of the minimum one.

5. Ever since 1872 local trade has been largely influenced by considerations of currency.

The currency of the Straits Settlements is the dollar (Mexican, Japanese, or British, all circulating at par), and as the value of silver measured in gold gradually diminished, the trade interest, which favours selling in the dearest market and buying in the cheapest, has favoured exports to gold-standard countries and imports from silver-standard countries.

6. Since June 1893 the action of the Indian Government in closing their mints has discouraged imports from India while encouraging exports thereto.

7. In dealing with the statistics given in this report, it should be remembered that the Colony possesses no custom houses and no check on imports or exports.

Our statistics are obtained under Ordinance I. of 1886, and their accuracy is largely dependent on the good will of the trading community here, which includes many Chinese who have little sympathy for statistics.

8. Under these circumstances they cannot be expected to compare in point of correctness with those obtainable in countries where a customs service exists.

I have, &c.,

C. B. H. MITCHELL.

Enclosure in No. 20.

REPORT on FOREIGN IMPORTS, especially with regard to those ARTICLES which compete with BRITISH MANUFACTURES.

1. As stated in clause 4 of the Secretary of State's Despatch, dated 28th November 1895, it frequently happens that imports from foreign countries sent from the United Kingdom are included in Colonial statistics as British, and prior to the passing of the Merchandise Marks Act of 1888 the Colonial importer was, in many cases, ignorant of the actual country of origin, so that goods sent from Great Britain were almost invariably classed as of British manufacture. Even at the present time this system of declaring all goods which are sent on British bills of lading as from the United Kingdom must in part prevail, and prevents any accurate conclusions as to the exact extent to which Continental goods are and have been displacing those of British origin. The extension of

shipping facilities with the Continent, and the encouragement which the passing of the Merchandise Marks Act undoubtedly gave to direct dealings with such countries, in those articles of foreign make which were previously sent from the United Kingdom, have had the effect of lessening the imports from Great Britain, and increasing those from foreign ports, so that in taking into consideration statistics of trade, allowance must be made for a proportional increase being more apparent than real. There can, however, be no difficulty in arriving at the conclusion, that trade with the Continent is largely increasing in certain classes of goods, and it is in textiles chiefly that there is evidence of Great Britain fully holding her ground.

2. There is presented below a statement showing the imports from the United Kingdom and the principal European countries, after excluding specie and coal, from which a fair idea can be had as to the comparative position, keeping in view what has been stated regarding the nature of a portion of the Continental increases :—

[The unit adopted in the following table represents thousands of dollars.]

—	United Kingdom.	Germany.	Austria.	Belgium.	Holland.	Italy.	France.	Total.	Percentage of Total British.	Average Rate of Exchange, Bank Four Months' Sight.
	$	$	$	$	$	$	$	$		
1884	14,608	1,166	408	598	230	148	1,156	18,314	79¾	3/8¾
1885	14,715	1,455	483	627	200	141	829	18,450	79¾	3/6½
1886	12,715	1,707	659	519	282	108	700	16,690	76	3/3⅛
1887	16,043	1,966	893	856	252	90	860	20,960	76½	3/2¾
1888	17,447	2,158	859	1,230	402	165	1,237	23,498	74	3/1½
1889	16,112	1,912	317	1,073	649	380	1,202	21,645	74½	3/1½
1890	17,763	2,055	430	932	583	253	1,689	23,705	75½	3/5¼
1891	14,878	2,008	427	943	798	353	1,465	20,872	71½	3/3
1892	14,317	1,729	344	687	561	278	1,364	19,280	74½	2/10⅝
1893	14,056	2,399	381	785	689	224	1,200	19,734	71½	2/7 7/16
1894	18,658	3,284	635	1,045	780	223	1,202	25,827	72½	2/2

The large increase in United Kingdom imports in 1894 over 1893 is accounted for by an increase of over $4,000,000 in cotton piece goods. In 1889 imports of cotton piece goods from the United Kingdom amounted to $7,287,000; in 1890 to $9,415,000; in 1891 to $6,959,000; in 1892 to $6,606,000; in 1893 to $5,700,000; and in 1894 to $9,708,000. If cotton piece goods were excluded from these figures, the marked increase in Continental supplies would be more accentuated

3. Admitting that British goods are, in certain particular cases at least, being partly ousted by Continental makes, it remains to state, as far as known, the causes which are at work producing such undesired results. Britain is holding her own in staples and well-known lines, and is losing ground in certain classes, chiefly where special designs are an attraction, and novelty is looked for. I attribute the following as the chief causes at work detrimental to British industries, and will shortly refer to each in detail in order of importance :—

(*a*) Increase in sales of second and third rate qualities owing to fall in exchange.
(*b*) Want of enterprise on the part of British manufacturers.
(*c*) Increased shipping facilities with the Continent, and cheapness of freights.
(*d*) The large number of foreign import merchants, and long credits to purchasers, &c.

4.—(*a*) The currency of this Colony and the surrounding islands of the Archipelago is a silver one, and even in many of the Dutch possessions silver is the recognised medium of exchange in mercantile transactions. The subsidiary copper currency comprises cents, half-cents, and quarter-cents, and coins of the latter value are as much in vogue as the farthing in England. In 1884 the gold value of the dollar was about 3*s*. 9*d*., in 1889 about 3*s*. 2*d*., and in 1894 about 2*s*. 2*d*.; thus a European article which cost 50 cents in 1884, cost over 59 cents in 1889, and in 1894 nearly 87 cents.

The native found that, while there was no increase in wages, nor, to any extent, in the absolute necessities of life, except clothing, articles of European manufacture were steadily rising in price. An increase of even a few cents was very material to him, and as he was unable to cling longer to his favourite brands, he naturally looked around to get supplies suitable to his purse, and the Continent promptly responded to his call for a cheap article of inferior make.

Once the Asiatic has taken to a certain brand, provided it fairly carries out the purpose for which it is intended, he is slow to change, and the English manufacturer only when he finds trade has drifted from his control commences to make what should have been produced long before.

In nearly every foreign article which is most seriously competing with English, the price is the cause, cheapness almost invariably being with the Continental-made goods. Sometimes industrial conditions alone account for this, but very frequently it is on account of the inferior qualities produced; and it is to be noted in this connection that the practical application of the theory that dear goods are cheap goods in the end does not always hold economically good in the case of the Asiatic, whose desire to obtain a third-rate article at a third-rate price is often based on something more tangible than mere theory, and, in fact, the purchaser not being an expert, is often unable to keenly discriminate between the different qualities.

5.—(*b*) Truth loses nothing by frequency of repetition, and the want of enterprise which characterises the British manufacturer, so long as it bears no fruit, must be continually commented on. There are every few years new departures and changes of taste in the market, which the foreign importer is quick to anticipate and note, and he is well supported by the Continental manufacturer, who is eager to do business and at once proceeds to suit the new taste. The British manufacturer, while he may not refuse to supply new designs, generally requires that not less than a specified quantity must be taken, while his rival is only too glad to send out small assorted quantities, assured that it is to his interest should the new design succeed in taking the market, and knowing that the trade will not necessarily be confined to one country or Colony. One of the most striking instances of this apathy was well shown when it was first thought a business could be created in the manufacture of *sarongs* imitating the well known *batek* made by hand in Java. British manufacturers would not attempt it, on such grounds as the unsuitability of looms and rollers for producing the requisite size, &c., and they were not prepared to introduce the special machinery necessary. Holland, Switzerland, and Germany at once responded, and a very remunerative trade was begun, and finally when the British manufacturer deemed it worth his while to give attention to the matter, it was after the good times had departed and the trade was not on such a paying basis. Our position as a cotton-manufacturing country would probably have enabled us to almost monopolise the markets, and a glance at the returns under cotton goods, sarongs, &c., will give a slight idea of what we have lost. But this is only a partial view of the large business which is also carried on in Java and the Dutch Indies.

It is said, especially as regards metals, that the cheapness of the Belgian manufactures is partly due to the superior chemical and technical knowledge displayed by the makers in the composition, but, on the other hand, the mechanical process of manufacture in Great Britain is superior, and in angles and tees the sections are of equal thickness, a result scarcely ever obtained in foreign makes. In heavy joists and beams this is not a matter of so much consequence, provided the departures are not too serious, but in the first named class it is found preferable to get orders carried out in the United Kingdom, although the cost is higher. The business of local shipbuilding has of late considerably expanded, and it behoves our iron and steel manufacturers to carefully watch foreign competition.

I have been told by competent judges that very important results have ensued from the visits of foreign travellers who bring samples of their goods, and inspect the bazaar with the view of picking up ideas for new designs. I am happy to say that of late British merchants have more realised the importance of this, but, in hardware and cutlery especially, Germany continues to send her agents, no doubt with profitable results, and more attention to this system by home manufacturers is most expedient and necessary.

German houses are most energetic in sending samples and catalogues, these latter frequently in three languages, so that descriptions and prices are easily compared. Thus while the British merchant has been desirous only to maintain his hold, the object of his German rival has been to create a trade, which is always increasing, until it begins to encroach on English goods, which have for long had a standing in the market. Complaints are also general with regard to the inattention bestowed by home manufacturers to packing, even when express instructions have been given. It is notorious that in glassware and other brittle goods breakages are very frequent in cases packed in England, while the opposite experience prevails with Continental packing. Then it seems that instructions to fold goods in a certain manner, and to use a special colour in the paper covering certain goods, and numerous other petty details

are looked upon by the British merchant as matters of no moment; he fails to grasp the fact that what would not be of any weight in the opinion of a European, may be a matter of almost vital importance in the eyes of the Asiatic customer. Just as samples from and to Europe are sent more frequently and more generally by foreigners, so, in their correspondence between the houses and their agencies, letters are more frequent and more lengthy, and suggestions and questions are given and asked more elaborately.

6.—(*c*) When the Merchandise Marks Act came into effect in the United Kingdom, Eastern buyers and dealers, for the first time became aware, that certain goods which were received from England, and sold as British, were really of foreign manufacture. There is little doubt but many classes of goods have for years been imported into Britain from the Continent and sent out to the Eastern markets as British, and that the home agents have, in some cases pushed the doctrine of buying in the cheapest market, irrespective of the margin of difference, to an extreme. Goods of British make might, at any rate in some cases, have been purchased at very little above Continental prices. The effect has been not only to encourage direct dealing with Hamburg and Antwerp, but to extend trade in other lines, thus if cotton singlets were from the Continent, why not thread and buttons? and if steel was cheaper from Antwerp, why not needles, &c.?

There has been a growing increase in the tonnage from these ports, and freights all round are from 30 to 50 per cent. cheaper. British lines of steamers take consignments of Straits produce to the Continent, and after discharging a portion, fill up with German and Belgian goods for the East at very low rates. These vessels then proceed to London, Glasgow, and Liverpool where they discharge the remainder of their produce and take goods for Eastern ports at rates as much in excess of those charged in Belgium and Germany as I have indicated. At certain provincial British ports, on the other hand, British merchandise is sent to Hamburg and other ports to be transhipped there into German vessels for the Far East. These drawbacks to British trade must be well understood at home, where however the extent of the injury to British interests cannot be altogether estimated. It is very difficult to get much direct evidence of the injurious results thus caused to British trade, though in heavy goods, where dead weight is reckoned for freights, and in which there are classes where prices are very finely divided, the consequences are certainly prejudicial. A very direct case in light weight goods charged by measurement has been brought to my notice. A certain English firm having connections in Hong Kong and China imports a class of goods by British vessels from a Continental port, the rates of freight for which are quoted 22½ marks per ton, Singapore-Hong Kong optional; from London the rates are 35*s.* 6*d.* per ton for Singapore, and 42*s.* 6*d.* per ton for Hong Kong with 5 per cent. primage in each case; owing to heavier dock dues and freights, the importers find that it is advisable to pay 25*s.* more to a foreign manufacturer for an article which could be bought in London at a sum less by that amount.

There is very keen competition between Scotch and German biscuits, and I find that very recently while 12*s.* 6*d.* per ton was the rate for this class of goods from Hamburg, 20*s.* was quoted from London. It is admitted that 12*s.* 6*d.* is an exceptionally low rate, but the difference is still conspicuous. Some time ago there were large imports of British goods from Hamburg, the British merchant evidently finding it cheaper to send goods in this indirect way.

7.—(*d.*) In Singapore there may be said to be 34 firms interested in European imports, and of these 11 only are British in the sense that the partners and staff are of British nationality and have their home representatives in the United Kingdom. Of the 23 foreign firms, the bulk are of German nationality, but in two or three cases their home offices are situated in the United Kingdom. Of the British firms, not more than four or five can be said to give attention to imports only, the others being interested in both imports and exports, while of the foreign houses at least 12 firms may be said to practically confine themselves to doing an import trade. Thus it may be generally expected that British firms prefer to confine themselves to well-known saleable brands, and do not, as a rule, have the same keen desire to enter into new departures with the view of creating a small special trade which characterises the German import merchants, whose very existence, so to speak, depends on their sharpness in perceiving in what direction tastes can be suited and attracted.

It is said that in imports of goods in which competition is keen, such as in certain kinds of hard goods, sales are common where the profits do not actually exceed 2½ per cent. and in certain articles having an assured sale this is sometimes considerably above

the actual percentage of profit. The tendency of a too keen competition is to reduce the margin of profit, and finally to cause some competitors to retire from dealing in these goods, at least for a time, the result being that those firms left on the field bring out larger quantities, getting better discounts and practically retain the trade in their own hands. The small German import firms are prepared to give more financial facilities in the way of credits than most English firms care to do, and this partly accounts for special classes of articles showing increased imports from the Continent. It may be said that British firms do business with dealers on considerably shorter credits than foreign firms are ready to give. While probably two, or at most three, months is the extent generally allowed by British merchants, four months and six months is nothing uncommon in the case of sales made by foreigners. Payments made within one month are allowed 3 per cent. off selling prices, but German firms have different ways of arranging as to payment. A very common method is for the indent agent here to instruct his home correspondent to draw on the purchaser at two months' sight, and, as frequently happens, when the buyer cannot take up the documents the German firm here advances the money on a promissory note being given with interest for two or three months longer. Another system is for certain foreign firms to get their promissory notes discounted by the banks. The granting of such long credits has not been without its risks, and, from a statement I have seen of bankruptcies occurring since 1889, it is certain that foreign firms have suffered much more serious losses proportionally than British firms. The granting of long credits also encourages a tendency to overtrading which is to be deprecated.

German goods owe their increasing sale, at any rate to some extent, to this difference in credit systems, and so British goods of the same class, even when better value for the price, or a shade cheaper, are sometimes unable to be sold when a foreign article finds a market. This is very marked in the case of woollens and mixtures, the dealers in which are principally Tamils from South India to whom long credits seem to be of primary importance, but the effects are by no means confined to this class of merchandise, and hard goods also suffer from the same cause. It is not contended that all foreign merchants deal solely in foreign goods, in fact it is probable that the majority import more English than goods of any other nationality, but the class of articles sold is that where competition is keen, and the Continent is most strongly represented. Another cause of increased sales by foreign firms is the want of principle observed in pandering to the desires of native dealers, with a view of misleading their consumers. Thus the standard of weight and measurements are continually altering. Bamboo steel which formerly sold in kegs of 112 lbs. has been gradually reduced to 90 lbs. Wire nails likewise from 112 lbs. have fallen to as low as 92 lbs., so that there are six or seven weights in the market, all reduced with a view of cutting prices to suit the buyer, but which means indirect misrepresentation to the consumers. The British manufacturer at home does not always refuse to lend himself to this, although it has the tendency to throw more business into the hands of foreign merchants and indirectly injure British interests.

8. It is only recently that a new and unwelcome factor has appeared in the production of goods, the manufacture of which had previously been confined to European nations. Japan, from an insignificant and unrecognised commercial position, has sprung into existence and suddenly emerged a formidable rival. In her exports of coal, and to a smaller extent cotton goods, as well as in umbrellas, she competes with Great Britain; but it is in the various classes of inferior articles, in which Germany especially had almost captured the market, that Japan defies competition. She is rapidly extending her field of enterprise, and new productions, hitherto exclusively European, are entering the markets at prices impossible for Western manufactures. It is largely owing to her currency that Japan is so quickly expanding her trade, and, to about an equal extent, on account of the cheapness of labour.

The Colony, with its silver currency, welcomes a producer with whom she can trade practically without any risk of a change of value having to be met in the goods, while in her hands, and combined with this absence of risk, is a lower-priced article. This is the case with coal especially, where the question of fixity of exchange is of as much importance as cheapness.

9. The extraordinary strides made by Japan are shown in the following statements of her trade in 1884, 1889, and 1894:—

Value of Imports into the Colony from Japan direct, 1884, $59,000, of which, coal valued $40,452; 1889, $505,733, of which, coal valued $271,193, matches, $13,186; cloth of all kinds and umbrellas, $20,000; japanware, glass, earthenware, &c., $101,000; 1894, $3,661,758, of which, coal valued $1,616,176, matches, $495,261; cloth of all

kinds and umbrellas, $950,000; japanware, glass, earthenware, &c., $352,000; but this does not, by any means, represent the actual rate of progress, because many goods from Japan are purchased from Hong Kong, and it is only recently that shipping facilities have been extended to further a direct trade.

Thus the imports from Hong Kong in 1884 show a value of $490 only in matches, and in 1889 to the value of $351,821, and in 1894 to the value of $351,892, undoubtedly Japanese, and there are numerous other articles of Japanese origin credited to Hong Kong.

Meanwhile by sacrificing stability to cheapness, articles "made in Japan" are beginning to be looked upon with suspicion by purchasers who have found that the strong and well-shaped umbrellas are by no means waterproof, that the matches frequently fail to strike fire, and the clocks have a habit of stopping short. It is certain that there is such a revulsion now taking place, and, as has happened before, when very low Continental qualities have flooded the market, the tendency is to create a demand for a better-class article. There are, however, directions in which she need fear no rival, and if a little care is exercised in the class of goods she desires to send abroad, her position as a mercantile country will continue to grow. In many of her most prominent exports she has to import the raw material at higher rates than European countries, but labour can be procured so cheaply and freights are barely one-half of rates from Europe, not to speak of the advantages of fixity of exchange, so that it would take the most unpardonable errors on her part, such as tampering with the basis of her currency or studied neglect of the markets, to wrest from her the footing she has obtained in the East.

10. The questions of subsidies to shipping, special railway rates, export bounties, rates of discounts, &c., are of so complex and varied a kind that, at this end, the information is unobtainable, but these must be known to the Chambers of Commerce in the United Kingdom, and to British consular officers in foreign countries.

11. The figures given and dealt with in the following pages, are those showing imports proper, which are afterwards sold for export or for consumption in the Colony, and do not include goods transhipped, of which the trade returns take no notice, nor of goods merely passing through the ports without being landed. Although no statistics are kept of goods transhipped, it is apparent that this trade has very greatly increased, and especially in foreign goods sent to Java, the Celebes, and Siam.

ANNEXE I.

	Commodity.	Year.	Total Value of Importation in Dollars.	Value of the larger Imports from the United Kingdom and British Possessions.		Value of Imports from Foreign Countries in Dollars.	
			$		$		$
2	Animals - - -	1894	167,420	Australia - -	74,221	Netherlands India -	66,824
	Horses and ponies			India - - -	27,918	Other - -	3,376
						Total -	70,200
		1889	155,590	Australia - -	90,105	Netherlands India -	56,285
				India - - -	59,258	Other - - -	8,277
						Total - -	64,562
		1884	89,257	Australia - -	17,700	Netherlands India -	47,815
				India - -	18,652	Other - - -	1,930
						Total - -	49,745

No.	Commodity.	Year.	Total Value of Importation in Dollars.	Value of the larger Imports from the United Kingdom and British Possessions.		Value of Imports from Foreign Countries in Dollars.	
			$		$		$
3	Apparel, hosiery, millinery, haberdashery, small wares, napery, &c.	1894	2,870,415	United Kingdom -	512,516	Hong Kong,* Japan, and China.	1,829,550
				India - -	73,101	Germany - -	265,331
						France - -	47,186
						Austria - - -	76,010
						Belgium - -	28,769
						Other - - -	35,405
						Total - -	2,282,251
		1889	2,084,296	United Kingdom -	537,767	Hong Kong, Japan, and China.	1,074,044
				India - - -	74,534	Germany - -	159,519
						France - -	111,017
						Austria - - -	20,503
						Belgium - -	52,184
						Other - - -	51,701
						Total - -	1,468,968
		1884	1,271,066	United Kingdom -	432,094	Hong Kong, Japan, and China.	580,582
				India - - -	63,854	Germany - -	51,858
						France - -	58,985
						Austria - - -	46,299
						Belgium - -	10,870
						Other - - -	30,849
						Total - -	773,938
4	Arms and ammunition:						
	(a) Muskets, rifles, and fowling pieces.	1894	61,768	United Kingdom -	7,226	Belgium - -	25,225
						United States - -	19,562
						Germany - -	3,280
						Hong Kong - -	5,000
						Other - - -	1,375
						Total - -	54,442
		1889	101,160	United Kingdom -	26,898	Belgium - -	52,186
						United States - -	2,230
						Germany - -	16,878
						Other - - -	2,968
						Total - -	74,262
		1884	43,943	United Kingdom -	7,345	Belgium - -	27,335
						Germany - -	4,103
						Hong Kong - -	4,000
						Other - - -	1,110
						Total - -	36,548
	Pistols and revolvers.	1894	10,274	United Kingdom -	480	Belgium - - -	9,616
						United States - -	138
						Total - -	9,754
		1889	6,388	United Kingdom -	1,536	Belgium - -	4,092
						Other - - -	760
						Total - -	4,852
		1884	5,022	- - -	—	Belgium - -	1,322
						France - -	1,500
						Germany - -	2,200
						Total - -	5,022

* The port of Hong Kong in this return is apparently treated simply as the entrepôt of a considerable foreign trade.

STRAITS SETTLEMENTS.

No.	Commodity.	Year.	Total Value of Importation in Dollars.	Value of the larger Imports from the United Kingdom and British Possessions.		Value of Imports from Foreign Countries in Dollars.	
	Arms and ammunition—*cont.*:		$		$		$
	(*b*) Gunpowder -	1894	20,100	United Kingdom -	11,200	Germany - -	1,800
						Java (English) -	7,600
						Total - -	8,900
		1889	82,333	United Kingdom -	42,438	Germany - -	39,595
						Hong Kong - -	300
						Total - -	39,895
		1884	41,435	United Kingdom -	27,834	Belgium - -	2,636
						Germany - -	8,505
						France - -	2,460
						Total - -	13,601
	(*c*) Guns, artillery	1894	10,305	United Kingdom -	2,445	Belgium - -	3,660
						United States - -	4,200
						Total - -	7,860
		1889	6,556	United Kingdom -	1,630	Belgium - - -	3,860
						Other - - -	866
						Total - -	4,226
		1884	6,660	United Kingdom -	2,800	United States - -	1,300
						Other - - -	2,560
						Total - -	3,860
6	Beer and ale -	1894	662,838	United Kingdom -	249,862	Germany - -	392,120
						Austria - -	5,976
						Belgium - - -	6,900
						Holland - -	4,475
						Japan - - -	2,110
						Other - - -	585
						Total - -	412,166
		1889	676,354	United Kingdom - -	245,692	Germany - -	360,400
						Austria - - -	82,331
						Belgium - -	12,261
						Holland - - -	18,349
						Other - - -	7,201
						Total - -	430,542
		1884	334,561	United Kingdom -	207,802	Germany - -	113,442
						Austria - - -	3,049
						Belgium - -	9,338
						Other - - -	922
						Total - -	126,751
7	Biscuits and Bread -	1894	201,607	United Kingdom - -	88,781	Germany - -	104,271
						Other - - -	6,185
						Total - -	110,456
		1889	177,232	United Kingdom	106,595	Germany - -	53,046
						France - - -	7,035
						Belgium - -	7,268
						Other - - -	1,785
						Total - -	69,134
		1884	91,183	United Kingdom - -	67,563	Germany - -	20,155
						Belgium - - -	2,350
						Other - -	700
						Total - -	23,205

No.	Commodity.	Year.	Total Value of Importation in Dollars.	Value of the larger Imports from the United Kingdom and British Possessions.		Value of Imports from Foreign Countries in Dollars.	
			$		$		$
9	Books and Maps -	1894	139,925	United Kingdom -	29,826	Hong Kong and China	21,979
				India - - -	70,890	Egypt - - -	4,150
						Other - - -	12,744
						Total - -	38,873
		1889	96,970	United Kingdom - -	32,278	Hong Kong and China	13,018
				India - - -	41,690	Egypt - - -	2,570
						Other - - -	6,769
						Total - -	22,357
		1884	71,361	United Kingdom - -	10,210	Hong Kong and China	9,492
				India - - -	46,357	Other - - -	4,997
						Total - -	14,489
10	Butter and Cheese -	1894	169,925	United Kingdom - -	19,900	France - - -	32,088
				India - - -	24,588	Germany - -	31,108
						Holland - - -	21,337
						Italy - - -	25,705
						Belgium - - -	8,187
						Other - - -	3,660
						Total - -	122,085
		1889	80,742	United Kingdom - -	11,678	France - - -	22,415
						Germany - -	5,035
						Holland - - -	24,282
						China - - -	10,762
						Other - - -	4,341
						Total - -	66,835
		1884	69,980	United Kingdom -	48,802	Germany - -	4,262
						Holland - - -	4,847
						Italy - - -	4,195
						Belgium - - -	3,665
						Other - - -	3,793
						Total - -	20,762
11	Candles - -	1894	153,281	United Kingdom - -	8,141	Hong Kong and Japan	54,434
						Belgium - -	58,310
						Germany - -	19,499
						Holland - -	6,125
						Austria - - -	3,500
						Other - - -	3,212
						Total - -	145,080
		1889	100,168	United Kingdom - -	10,168	Hong Kong and Japan	12,807
						Austria - -	1,639
						Belgium - - -	62,050
						Holland - -	2,940
						Other - -	10,564
						Total - -	90,000
		1884	140,968	United Kingdom -	44,318	Austria - -	13,915
						Belgium - -	42,930
						Holland - -	23,560
						Germany - -	12,497
						Other - -	2,518
						Total - -	95,420

STRAITS SETTLEMENTS.

No.	Commodity.	Year.	Total Value of Importation in Dollars.	Value of the larger Imports from the United Kingdom and British Possessions.	$	Value of Imports from Foreign Countries in Dollars.	$
14	Cement -	1894	268,400	United Kingdom -	237,511	Belgium - -	15,999
						Germany - -	12,530
						Holland - -	1,850
						Japan - - -	350
						Total -	30,729
		1889	229,922	United Kingdom - -	152,716	Belgium - -	10,283
						France - -	40,025
						Germany - -	26,623
						Other - -	275
						Total - -	77,206
		1884	118,720	United Kingdom - -	107,494	Belgium - -	5,940
						Germany - -	4,821
						Holland - -	465
						Total - -	11,226
16	Chemicals - -	1894	108,822	United Kingdom -	74,189	Hong Kong, Japan, and China.	10,410
				India - - -	6,338	Belgium - -	7,200
						Germany - -	7,688
						Other - - -	2,045
						Total - -	27,343
		1889	10,769	United Kingdom - -	6,290	Belgium - -	355
				India - - -	900	Germany - -	2,585
						Other - - -	639
						Total -	3,579
		1884	4,675	United Kingdom - -	1,525	Germany - -	3,050
18	Clocks and watches	1894	104,494	United Kingdom -	18,004	Hong Kong and Japan	41,378
						France - -	22,395
						Germany - -	16,292
						United States -	2,600
						Other - - -	3,495
						Total -	86,155
		1889	64,305	United Kingdom - -	23,214	Hong Kong - -	11,005
						France - -	16,730
						Germany - -	7,528
						United States -	3,460
						Other - - -	2,343
						Total -	41,066
		1884	58,018	United Kingdom -	21,201	Hong Kong - -	6,239
						France - -	25,590
						Germany - -	1,267
						United States -	2,300
						Other - - -	1,421
						Total -	36,817
19	Coal -	1894	4,279,208	United Kingdom -	2,188,067	Japan - -	1,616,176
				Australia - -	279,317	Tongkin - - -	2,000
				Sarawak and Labuan -	144,055	Hong Kong - -	10,000
				Calcutta - -	44,558	Other - - -	35
						Total - -	1,628,211
		1889	3,837,128	United Kingdom -	2,944,357	Japan - - -	271,193
				Australia - -	490,836	Germany - -	18,042
				Sarawak and Labuan -	39,091	Other - - -	5,824
				Calcutta - -	67,785		
						Total -	295,059
		1884	3,738,890	United Kingdom -	3,548,901	Japan - - -	40,452
				Australia - -	127,530	China - - -	7,695
				Sarawak and Labuan	19,312		
						Total - -	48,147

No.	Commodity.	Year.	Total Value of Importation in Dollars.	Value of the larger Imports from the United Kingdom and British Possessions.		Value of Imports from Foreign Countries in Dollars.	
			$		$		$
20	Cordage and twine: (*b*) Manila rope -	1894	68,802	Hong Kong - -	18,831	Philippines and Sulu -	47,912
				United Kingdom -	1,840	Other - - -	248
						Total - -	48,160
		1889	47,423	Hong Kong - -	5,370	Philippines and Sulu -	41,853
		1884	47,915	Hong Kong - -	1,740	Philippines and Sulu -	34,903
						Dutch Borneo - -	10,338
						Other - - -	930
						Total - -	45,871
	(*c*) Europe rope -	1894	3,703	United Kingdom -	3,108	Russia - -	410
						Germany - -	150
						Total - -	560
		1889	18,226	United Kingdom -	4,775	Germany - -	2,790
				India - - -	9,223	Other - - -	1,438
						Total - -	4,228
		1884	16,701	United Kingdom -	12,390	Germany - -	611
						Italy - - -	3,500
						Other - - -	200
						Total - -	4,311
	(*d*) Twine and log line.	1894	237,889	United Kingdom -	13,059	China - - -	26,817
				Hong Kong - -	22,428	Germany - -	1,212
				Calcutta - -	106,206	Other - - -	1,167
						Total - -	96,196
		1889	64,761	United Kingdom -	3,610	China - - -	5,172
				Hong Kong - -	350	Other - -	1,133
				Calcutta - - -	54,496		
						Total - -	6,305
		1884	66,880	United Kingdom -	5,888	China - - -	11,451
				Hong Kong - -	1,351	Other - - -	471
				Calcutta - - -	47,169		
						Total - -	11,922
21	Corn: Wheat flour	1894	1,152,534	India - - -	17,361	Hong Kong and United States.	1,130,034
				Australia - -	610	Austria - -	2,200
						Germany - -	1,000
						Other - - -	2,291
						Total - -	1,135,525
		1889	1,020,649	India - - -	25,219	Hong Kong - -	948,434
						China - - -	32,797
						Austria - -	9,465
						Other - - -	3,207
						Total - -	993,903
		1884	711,518	India - -	28,304	Hong Kong - -	674,141
				Australia - -	600	China - -	3,111
						Austria - -	9,000
						Other - -	362
						Total - -	686,614
22	Cotton Yarn: (*a*) Grey and bleached.	1894	1,197,299	United Kingdom -	427,793	Germany - -	6,050
				India - -	762,391	Other - - -	1,065
						Total - -	7,115
	White twist -	1889	324,571	United Kingdom -	135,291	Germany - -	1,640
				India - -	159,320	Italy - -	6,800
						France - -	1,150
						China - -	13,597
						Other - - -	6,773
						Total - -	29,960
		1884	554,816	United Kingdom -	525,943	Germany - -	1,144
				India - - -	22,019	Austria - -	1,920
						Other - - -	4,490
						Total - -	7,554

STRAITS SETTLEMENTS.

No.	Commodity.	Year.	Total Value of Importation in Dollars.	Value of the larger Imports from the United Kingdom and British Possessions.		Value of Imports from Foreign Countries in Dollars.	
			$		$		$
	(*b*) Dyed yarn -	1894	838,106	United Kingdom -	712,830	Austria - -	45,730
				India - - -	3,191	Belgium - -	8,015
						France - -	25,300
						Holland - -	27,380
						Italy - - -	10,000
						Germany - -	4,750
						Other - - -	870
						Total - -	122,045
		1889	968,066	United Kingdom -	854,489	Austria - -	1,120
				India - - -	59,107	Belgium - -	9,780
						France - -	8,380
						Holland - -	20,005
						Italy - - -	6,555
						Other - -	8,670
						Total - -	54,470
		1884	484,538	United Kingdom -	455,289	Austria - -	10,940
						Belgium - -	5,612
						France - -	4,758
						Germany - -	2,880
						Holland - -	2,760
						Italy - -	480
						Other - - -	1,080
						Total - -	28,460
23	Cotton Manufactures:						
	(*a*) Piece Goods, Plain (Grey, and White).	1894	7,807,595	United Kingdom -	7,096,448	Hong Kong - -	36,824
				India - - -	188,271	Japan - -	193,459
						Austria - -	6,675
						Belgium -	81,205
						France - -	13,118
						Germany - -	134,511
						Holland - -	18,084
						United States -	7,778
						Saigon (English) -	22,715
						Other - - -	8,442
						Total - -	522,876
		1889	5,709,381	United Kingdom -	5,391,500	Hong Kong - -	26,607
				India - - -	120,493	Japan - -	2,120
						Belgium - -	4,000
						China - -	36,431
						France - -	29,101
						Germany - -	36,964
						Holland - -	8,570
						Saigon - -	7,400
						Italy - - -	16,880
						Java - -	18,844
						Other - - -	10,271
						Total - -	197,388
		1884	6,774,943	United Kingdom -	6,594,372	Hong Kong - -	21,461
				India and Ceylon -	60,082	Austria -	2,015
						Belgium - -	3,275
						China - -	4,211
						Saigon - - -	1,250
						Germany - -	38,179
						Holland - -	2,150
						Italy - -	14,661
						France - -	11,407
						Arabia - -	6,500
						United States - -	4,000
						Other - -	4,480
						Total - -	120,589

No.	Commodity.	Year.	Total Value of Importation in Dollars.	Value of the larger Imports from the United Kingdom and British Possessions.		Value of Imports from Foreign Countries in Dollars.	
			$		$		$
23	Cotton Manufactures—*cont.*						
	(a) Piece Goods, (Dyed and printed)	1894	3,925,106	United Kingdom -	2,611,817	Hong Kong - -	189,495
				India - - -	556,159	Japan - -	201,651
						Austria - -	114,186
						Belgium - -	30,465
						China - - -	7,342
						France - - -	82,160
						Germany - -	27,143
						Holland - - -	30,090
						Italy - -	38,917
						Java - -	16,810
						Siam - - -	11,227
						Other - - -	6,994
						Total - -	756,480
		1889	2,914,734	United Kingdom -	1,895,258	Hong Kong -	17,142
				India - - -	502,309	Japan - - -	1,200
						Austria -	33,326
						Belgium - - -	35,630
						China - - -	58,954
						France - - -	121,179
						Germany - -	58,167
						Holland - - -	22,798
						Italy - - -	84,393
						Siam - - -	38,110
						Egypt - - -	9,320
						Sumatra - - -	18,859
						Saigon - -	5,320
						Philippines - -	8,369
						Other - - -	2,190
						Total - -	514,887
		1884	2,223,317	United Kingdom -	1,044,735	Hong Kong - -	4,408
				India - - -	785,541	Austria - - -	40,210
						Belgium - -	16,609
						China - - -	1,700
						France - -	99,542
						Germany - -	150,632
						Holland - -	40,715
						Italy - - -	22,580
						Siam - - -	8,850
						Other - -	6,780
						Total - -	391,426
	Sarongs, slendangs, and kains.	1894	2,311,991	United Kingdom -	114,845	Austria - -	115,980
				India - - -	785,949	Belgium - - -	47,035
						China - - -	39,616
						France - - -	438,401
						Germany - -	13,847
						Holland - - -	304,615
						Hong Kong - -	14,650
						Italy - - -	24,770
						Japan - - -	10,160
						Java - - -	369,331
						Siam - - -	12,119
						Sumatra - - -	6,705
						Celebes - -	9,340
						Other - - -	4,406
						Total - -	1,410,975
		1889	1,523,478	United Kingdom -	208,093	Austria - -	42,825
				India - - -	817,660	Belgium - -	50,574
						France - -	437,024
						Germany - -	6,505
						Holland - -	88,441
						Egypt - - -	14,653
						Italy - - -	148,048
						Java - - -	168,834
						Philippines - -	82,525
						Other - - -	5,931
						Total - -	995,360
		1884	1,170,601	United Kingdom -	196,326	Austria - -	156,565
				India - - -	38,154	Belgium - - -	21,397
						France - -	606,106
						Germany - -	21,095
						Holland - - -	70,376
						Italy - - -	9,488
						Java - - -	26,769
						Siam - - -	5,800
						Other - - -	15,254
						Total - -	934,750

No.	Commodity.	Year.	Total Value of Importation in Dollars.	Value of the larger Imports from the United Kingdom and British Possessions.		Value of Imports from Foreign Countries in Dollars.	
			$		$		$
	Cotton manufacturers—*cont.*						
	(*e*) Sewing thread	1894	439,502	United Kingdom -	424,891	Hong Kong and China	7,276
						Belgium - -	980
						Germany - -	1,750
						Italy - - -	2,000
						Other - - -	1,000
						Total - -	13,006
		1889	401,884	United Kingdom -	315,865	Hong Kong and China	58,870
						Austria - - -	1,300
						France - -	7,195
						Germany - -	2,819
						Saigon - - -	13,835
						Other - - -	1,036
						Total - -	84,605
		1884	272,909	United Kingdom -	143,948	Hong Kong and China	118,726
						Germany - -	7,205
						Philippines - -	1,700
						Other - - -	1,125
						Total - -	128,756
	(*f*) Cotton blankets	1894	253,718	United Kingdom -	204,175	Japan - - -	8,230
						France - - -	18,180
						Germany - -	19,698
						Italy - - -	2,160
						Other - - -	5,165
						Total - -	49,128
		1889	112,930	United Kingdom -	81,816	France - -	8,960
						Germany - -	11,172
						Italy - - -	6,000
						Other - - -	4,986
						Total - -	31,118
		1884	120,606	United Kingdom -	108,240	France - -	5,125
						Germany - -	4,465
						Belgium - -	2,210
						Other - - -	566
						Total - -	12,366
	(*g*) Handkerchiefs (coloured and plain).	1894	80,835	United Kingdom -	29,892	Hong Kong and Japan	27,078
				India - - -	15,808	Austria - -	4,320
						France - - -	2,285
						Holland - -	1,140
						Other - - -	817
						Total - -	35,635
		1889	97,876	United Kingdom -	47,894	Hong Kong - -	1,865
				India - - -	2,725	Austria - -	1,665
						France - - -	13,814
						Belgium - -	2,225
						Germany - -	16,803
						Italy - - -	7,400
						Other - - -	3,985
						Total - -	47,757
		1884	49,514	United Kingdom -	16,222	Austria - - -	5,000
				India - - -	12,387	France - -	12,240
						Belgium - - -	1,380
						Germany - -	2,085
						Other - - -	200
						Total - -	20,905

No.	Commodity.	Year.	Total Value of Importation in Dollars.	Value of the larger Imports from the United Kingdom and British Possessions.		Value of Imports from Foreign Countries in Dollars.	
			$		$		$
24	Earthenware and china ware.	1894	917,623	United Kingdom -	129,725	Hong Kong and China	554,029
				India - - -	14,240	Japan - - -	72,410
						Austria - -	4,610
						Belgium - - -	102,495
						Germany - -	25,411
						French Indo-China -	9,970
						Other - - -	3,145
						Total - -	772,070
		1889	638,890	United Kingdom -	125,258	Hong Kong and China	372,068
				India - - -	13,944	Japan - - -	13,955
						Austria - -	5,658
						Belgium - -	77,510
						Germany - -	14,479
						France - -	1,325
						French Indo-China -	5,935
						Other - - -	6,138
						Total - -	497,068
		1884	652,984	United Kingdom -	162,499	Hong Kong and China	422,081
				India - - -	2,495	Japan - - -	720
						Belgium - -	46,705
						Germany - -	9,280
						French Indo-China -	6,220
						Other - - -	2,960
						Total -	487,966
26	Furniture, cabinet and upholstery wares also mirrors and fancy goods, toys, &c.	1894	257,521	United Kingdom -	60,216	Hong Kong and Japan	91,351
				India - - -	4,368	Austria - -	4,470
						Belgium - -	2,190
						China - - -	5,575
						France - -	5,047
						Germany - -	55,353
						Holland - -	24,130
						Java - - -	2,013
						Other - -	2,602
						Total - -	192,731
	Europe woodenware		26,812	United Kingdom -	12,255	Austria - -	2,305
						Germany -	9,832
						United States - -	1,230
						Other -	1,190
						Total - -	14,557
		1889	159,289	United Kingdom -	55,362	Hong Kong and Japan	42,001
				India - -	2,270	Austria - -	21,306
						Belgium - -	4,884
						China - - -	10,949
						France - -	1,705
						Germany - -	13,490
						Java - -	2,285
						United States - -	1,345
						Other - -	3,068
						Total -	101,033
	Europe woodenware		9,411	United Kingdom -	7,015	Austria - -	875
						Belgium - -	1,031
						Germany - -	250
						United States - -	240
						Total - -	2,396
		1884	322,128	United Kingdom -	175,161	Hong Kong - -	67,520
				India - -	7,628	Austria - -	13,915
						Belgium - -	3,380
						China - -	9,029
						France -	11,545
						Germany -	28,094
						Java - -	90
						Italy - -	1,220
						Other - -	3,428
						Total -	138,531
	Europe woodenware		5,917	United Kingdom -	1,031	Germany - -	4,876

STRAITS SETTLEMENTS.

No.	Commodity.	Year.	Total Value of Importation in Dollars.	Value of the larger Imports from the United Kingdom and British Possessions.		Value of Imports from Foreign Countries in Dollars.	
			$		$		$
27	Glass and glassware (excluding mirrors).	1894	454,062	United Kingdom -	91,779	Hong Kong and Japan	69,356
				India -	5,890	Austria - -	22,255
						Belgium - -	77,616
						France - -	1,895
						Germany - -	156,806
						Holland - -	14,260
						Italy - -	10,684
						Other - -	4,041
						Total - -	356,413
		1889	410,249	United Kingdom -	134,568	Hong Kong - -	58,945
				India - - -	2,066	Austria - - -	18,481
						Belgium - -	71,069
						France - - -	1,950
						Germany - -	105,776
						Holland - - -	5,909
						Italy - - -	6,145
						Other - - -	3,563
						Total -	271,786
		1884	330,965	United Kingdom -	113,007	Hong Kong - -	50,762
						Austria - -	6,325
						Belgium - - -	44,205
						France -	9,019
						Germany - -	104,681
						Italy - - -	1,400
						Other - - -	700
						Total - -	217,092
30	Hardware and Cutlery.	1894	845,898	United Kingdom -	403,788	Austria - -	29,978
				India - - -	10,837	Belgium - - -	62,220
				Ceylon - - -	1,085	France - - -	22,898
						Germany - -	287,442
						Holland - - -	17,957
						United States -	2,915
						Other - - -	6,778
						Total - -	430,188
		1889	790,578	United Kingdom -	475,011	Austria - -	26,168
				India - - -	10,835	Belgium - - -	113,506
				Ceylon - - -	14,500	France - - -	10,475
						Germany - -	123,133
						United States - -	2,800
						Other - - -	14,090
						Total - -	290,172
		1884	549,826	United Kingdom -	385,885	Austria - -	690
				India - - -	6,912	Belgium - - -	42,288
						France - -	8,812
						Germany - -	81,888
						Hong Kong - -	8,599
						China - - -	11,575
						Other - -	2,587
						Total - -	156,379
31	Hats and caps (excluding ladies').	1894	182,457	United Kingdom -	78,785	Hong Kong and Japan	44,819
				India - - -	22,029	China - -	5,613
						Austria - - -	15,415
						Belgium - -	5,960
						Egypt - - -	2,220
						Germany - -	4,434
						Java - - -	1,745
						Other - - -	1,408
						Total - -	81,613
		1889	131,775	United Kingdom -	42,176	Hong Kong - -	31,168
				India - - -	12,660	China - - -	12,843
						Austria - - -	9,090
						Belgium - -	2,760
						Germany - -	8,650
						Java - - -	6,024
						Other - - -	6,404
						Total - -	76,939
		1884	146,018	United Kingdom -	47,584	Hong Kong - -	35,684
				India - - -	5,070	China - - -	5,016
						Austria - - -	19,917
						Belgium - -	4,305
						Germany - -	5,360
						France - - -	17,350
						Other - - -	5,732
						Total - -	93,364

No.	Commodity.	Year.	Total Value of Importation in Dollars.	Value of the larger Imports from the United Kingdom and British Possessions.		Value of Imports from Foreign Countries in Dollars.	
			$		$		$
34	Leather : (b) Boots and shoes (excluding Chinese, which are not leather).	1894	55,058	United Kingdom -	33,822	France - - -	2,565
				India - - -	2,690	Austria - -	1,200
						Germany - - -	9,664
						Japan - - -	2,219
						Other - - -	2,873
						Total - -	18,521
		1889	34,643	United Kingdom -	22,206	Austria - -	3,705
				India - - -	3,681	Germany - - -	390
						Java - - -	2,277
						Turkey - - -	1,000
						Holland - -	649
						Other - - -	655
						Total - -	8,676
		1884	32,210	United Kingdom -	22,364	Austria - - -	200
				India - - -	8,712	France - -	350
						Java - - -	584
						Total - -	1,134
36	Linen and Jute Manufactures : (a and b) Linen cloth.	1894	55,178	United Kingdom -	35,011	Germany - -	18,862
						Holland - - -	700
						Other - - -	600
						Total - -	20,162
		1889	82,708	United Kingdom -	43,795	Germany - -	17,993
				India - - -	4,600	Hong Kong - -	15,530
						Other - - -	790
						Total - -	34,313
		1884	37,008	United Kingdom -	22,538	Germany - -	14,470
37	Machinery - -	1894	466,011	United Kingdom -	369,734	Austria - -	1,033
				Malay Peninsula (removal of works to Singapore).	70,400	Belgium - - -	5,250
						France - -	1,280
						Germany - - -	59,690
						Java - - -	3,669
						United States - -	6,700
						Other - - -	6,090
						Total -	83,712
		1889	622,795	United Kingdom -	559,133	Austria - -	850
				India - - -	2,340	Belgium - - -	14,352
						France - - -	3,900
						Germany - - -	16,383
						Holland - -	7,454
						Java - - -	4,090
						Hong Kong - -	5,070
						United States - -	6,658
						Other - -	2,465
						Total - -	61,222
		1884	252,749	United Kingdom -	242,648	Germany - -	6,444
				India - - -	2,100	Other - - -	1,557
						Total - -	8,001
38	Manure: (a) Guano	1894	47,610	United Kingdom -	1,250	Germany -	40,900
				Malay Peninsula -	4,864	Belgium - -	1,000
						Other - - -	96
						Total - -	41,996
		1889	346,229	United Kingdom -	75,054	Belgium - -	110,750
				Malay Peninsula -	18,875	Holland - - -	145,500
						Other - -	250
						Total -	256,500
		1884	52,062	United Kingdom -	15,226	Germany - -	29,960
				Malay Peninsula -	6,866	Other - - -	10
						Total - -	29,970

a 24700.

No.	Commodity.	Year.	Total Value of Importation in Dollars.	Value of the larger Imports from the United Kingdom and British Possessions.		Value of Imports from Foreign Countries in Dollars.		
			$		$			$
	Manure—*cont.*							
	(*b*) Other sorts, excluding bones and oil cakes.	1894	49,387	United Kingdom -	27,650	Java - - -		1,200
				India - - -	19,246	China - - -		450
						Sumatra - - -		741
						Total - -		2,391
		1889	31,788	United Kingdom -	16,520	Belgium - - -		3,600
				India - - -	1,880	Germany - -		3,340
						Hong Kong - -		5,588
						Other - - -		960
						Total - -		13,388
		1884	995	United Kingdom -	945			
				India - - -	50			
39	Medicines and drugs (excluding native medicines).	1894	170,716	United Kingdom -	145,417	France - -		1,481
						Germany - -		18,093
						Hong Kong (Drugs) -		3,855
						United States - -		840
						Other - - -		330
						Total - -		24,599
		1889	127,918	United Kingdom -	97,308	Austria - -		850
						Belgium - - -		4,750
						France - -		605
						Germany - -		14,836
						Holland - -		5,016
						Hong Kong (Drugs)		1,802
						China (Drugs) -		3,691
						Other - - -		60
						Total - -		30,610
		1884	47,007	United Kingdom -	42,258	Belgium - - -		150
						France - -		1,158
						Germany - -		1,470
						Holland - -		600
						Italy - - -		600
						United States - -		781
						Total - -		4,754
40	Metals:							Nails.
	(A) Iron:							
	(*c*) Bar iron, bolt, nail, rod, angle, and wire nails.	1894	411,080 of which nails (wire and rose) alone amounted to 157,392.	United Kingdom -	264,705 of which nails alone amounted to 33,712.	Belgium -	75,054	66,547
						Germany -	61,945	57,045
						Hong Kong -	8,704	—
						Other - -	88	88
						Total	145,791	123,680
								Nails and rod iron.
		1889	323,795 of which iron nails and rod iron amounted to 221,922.	United Kingdom -	260,270 of which iron nails and rod iron amounted to 159,131.	Belgium -	47,148	46,622
						Germany -	13,115	13,115
						France -	100	—
						Other -	2,430	2,422
						Total -	62,793	62,159
								Nails and rod iron.
		1884	313,601 of which iron nails and rod iron amounted to 64,148.	United Kingdom -	261,335 of which iron nails and rod iron amounted to 30,634.	Belgium -	32,935	22,190
						Germany -	10,212	10,212
						France -	990	990
						Hong Kong -	2,785	—
						Other -	524	102
						Total -	47,446	33,494

No.	Commodity.	Year.	Total Value of Importation in Dollars.	Value of the larger Imports from the United Kingdom and British Possessions.		Value of Imports from Foreign Countries in Dollars.	
			$		$		$
	Metals—*cont.*:						
	(*h*) Ironware -	1894	518,874	United Kingdom -	275,339	Hong Kong and China	130,920
				India - - -	10,790	Austria - -	3,764
				Malay States - -	10,114	Belgium - - -	19,285
						France - -	1,850
						Germany - -	43,193
						Holland - -	6,325
						United States - -	917
						Other - - -	13,928
						Total - -	220,182
		1889	518,271	United Kingdom -	295,953	Hong Kong and China	86,017
				India - - -	3,052	Austria - -	7,605
						Belgium - - -	24,805
						France - -	1,765
						Germany - -	77,608
						Holland - -	3,808
						United States - -	1,600
						Other - - -	14,111
						Total - -	217,319
		1884	186,671	United Kingdom -	104,030	Hong Kong and China	54,773
						Austria - -	2,300
						Belgium - - -	3,340
						Germany - -	12,532
						Other - - -	8,646
						Total - -	81,591
	(*i* and *k*) Steel of all kinds.	1894	108,400	United Kingdom -	79,963	Belgium - - -	11,052
						Germany - -	16,165
						Other - - -	1,200
						Total - -	28,437
		1889	25,284	United Kingdom -	18,124	Belgium - - -	5,000
						Germany - -	500
						Other - - -	1,660
						Total - -	7,160
		1884	19,983	United Kingdom -	6,190	Belgium - -	10,435
						Germany - -	1,995
						Other - - -	1,363
						Total - -	13,793
	(B) Copper:						
	(*a*) Unwrought	1894	9,384	United Kingdom -	2,100	Japan - - -	5,306
						Java - - -	1,588
						Other - - -	10
						Total - -	6,904
		1889	23,764	United Kingdom -	21,614	Java - - -	2,150
		1884	48,923	United Kingdom -	635	Netherlands India -	43,420
						China - - -	2,787
						Other - - -	1,750
						Total - -	47,957
	(*b*) Wrought -			Imported from United Kingdom.	—	Not 5 per cent. foreign	

No.	Commodity.	Year.	Total Value of Importation in Dollars.	Value of the larger Imports from the United Kingdom and British Possessions.		Value of Imports from Foreign Countries in Dollars.	
	Metals—*cont.*		$		$		$
	(B) Copper—*cont.*: Copperware -	1894	191,092	United Kingdom -	14,126	Hong Kong and China	139,851
				India - - -	21,626	Japan - - -	4,510
						Java - -	8,597
						Other - - -	8,179
						Total - -	155,067
		1889	174,153	United Kingdom -	8,402	Hong Kong and China	115,667
				India - -	22,680	Japan - - -	8,840
						Java - -	21,485
						Other - - -	1,480
						Total - -	142,422
		1884	107,701	United Kingdom -	6,046	Hong Kong and China	71,482
				India - -	26,259	Java - - -	2,381
						Other - -	1,434
						Total - -	75,197
	Yellow metal sheathing.	1894	53,906	United Kingdom -	47,773	Belgium - -	4,468
		1889	83,788	United Kingdom -	77,438	Belgium - -	2,850
						Java - -	3,500
						Total - -	6,350
		1884	74,533	United Kingdom -	74,353	Other - - -	180
	(c) Brassware -	1894	374,767	United Kingdom -	99,503	Hong Kong and China	109,308
				India - -	8,826	Germany - -	100,028
						Java - -	44,428
						United States - -	3,845
						Other - -	9,185
						Total - -	266,216
		1889	117,493	United Kingdom -	40,425	Hong Kong and China	42,777
				India - -	4,692	Germany - -	2,810
						Java - -	26,297
						Other - -	852
						Total - -	72,736
		1884	142,448	United Kingdom -	63,019	Hong Kong and China	64,898
				India - -	5,775	Java - -	6,873
						Other - -	2,383
						Total - -	73,654
	(d) Lead of all kinds, except gas pipes.	1894	41,511	United Kingdom -	33,439	Hong Kong - -	1,974
						Belgium - -	1,668
						France - -	2,000
						Germany - -	570
						Java - -	1,860
						Total - -	8,072
		1889	25,469	United Kingdom -	14,689	Hong Kong - -	680
				India and Australia -	3,670	Java - -	3,674
						Austria - -	900
						Other - -	156
						Total - -	5,410
		1884	26,041	United Kingdom -	12,531	Hong Kong - -	360
						France - -	10,000
						Germany - -	3,140
						Other - - -	10
						Total - -	13,510

No.	Commodity.	Year.	Total Value of Importation in Dollars.	Value of the larger Imports from the United Kingdom and British Possessions.		Value of Imports from Foreign Countries in Dollars.	
			$		$		$
	Metals—*cont.*						
	(*f*) Zinc sheathing, roll, and zinc-ware.	1894	125,770	United Kingdom -	64,703	Belgium - -	40,792
						Germany - -	16,040
						Java - - -	2,654
						Other - -	442
						Total - -	59,928
		1889	44,513	United Kingdom -	28,944	Belgium - -	14,800
						Java - -	446
						Hong Kong - -	323
						Total - -	15,569
		1884	48,311	United Kingdom -	31,761	Belgium - -	16,170
						Germany - -	300
						Other - - -	80
						Total - -	16,550
41	Musical Instruments	1894	48,108	United Kingdom -	15,927	Hong Kong and Japan	1,791
						Germany - -	23,760
						France - - -	1,320
						Holland - -	1,370
						Other - - -	2,840
						Total - -	31,081
		1889	36,696	United Kingdom -	14,484	Hong Kong - -	299
						China - - -	1,390
						Germany - -	15,717
						France - -	2,560
						Other - - -	1,246
						Total - -	21,212
		1884	17,401	United Kingdom -	7,168	Germany - -	6,145
						France - - -	500
						Belgium - -	980
						Other - - -	2,608
						Total - -	10,233
43	Oil, seed : Linseed oil -	1894	32,315	United Kingdom -	29,541	Belgium - -	2,600
		1889	16,079	United Kingdom -	16,018	Other - - -	61
		1884	18,957	United Kingdom -	18,807		
44	Paints and varnishes, and analyne dyes.	1894	344,878	United Kingdom -	181,147	Belgium - - -	45,910
				India - - -	14,193	Germany - -	62,318
						Hong Kong and China	29,042
						Java - - -	6,835
						France - - -	3,015
						Other - - -	2,295
						Total - -	149,355
		1889	219,000	United Kingdom -	126,219	Belgium - -	20,790
				India - -	2,163	Germany - -	26,844
						Hong Kong and China	35,254
						Other - - -	7,730
						Total - -	90,618
		1884	267,784	United Kingdom -	145,574	France - -	14,020
				India - - -	12,948	Belgium - - -	4,091
						Germany - -	26,987
						Hong Kong and China	58,269
						Other - - -	5,895
						Total - -	109,262

No.	Commodity.	Year.	Total Value of Importation in Dollars.	Value of the larger Imports from the United Kingdom and British Possessions.		Value of Imports from Foreign Countries in Dollars.	
			$		$		$
45	Paper and paperware	1894	1,391,985	United Kingdom -	38,117	Hong Kong and China	1,166,791
				India - -	13,049	Austria - -	109,514
						Belgium - - -	23,910
						Germany - -	25,277
						Japan - - -	7,876
						Egypt - -	3,697
						Other - - -	4,964
						Total - -	1,341,029
		1889	1,232,923	United Kingdom -	27,912	Hong Kong and China	1,148,738
						Austria - -	21,642
						Belgium - - -	4,175
						Germany - -	18,986
						Other - - -	10,450
						Total - -	1,203,991
		1884	691,053	United Kingdom -	17,379	Hong Kong and China	643,419
						Austria - -	9,685
						Belgium - -	14,160
						Germany - -	2,459
						Other - -	3,589
						Total -	673,312
48	Plate and plated ware.	1894	9,854	United Kingdom -	7,669	Germany - -	805
				India - - -	685	Other - - -	745
						Total - -	1,550
		1889	16,158	United Kingdom -	9,508	Germany - -	3,000
						Other - -	3,650
						Total - -	6,650
		1884	985	United Kingdom -	985		
49	Provisions not otherwise detailed:						
	(*a*) Gilman's stores (*b*) European Provisions.	1894	(*a*)397,088 (*b*)258,730	United Kingdom -	420,512	Hong Kong and China ((*a*) only).	52,229
				India ((*a*) only) -	9,670	Germany - -	93,399
				Australia - -	8,488	France - -	24,781
			655,818			Austria - -	5,200
						United States -	10,906
						Holland - -	12,942
						Italy - -	5,917
						Other - - -	11,634
						Total - -	217,008
	(*c*) Milk, condensed.	1894	400,775	United Kingdom -	94,213	Germany - -	235,375
						Italy - -	66,437
						Other - - -	4,750
						Total - -	306,562
	(*a*), (*b*), and (*c*) -	1889	(*a*)180,045 (*b*) and (*c*) 753,302	United Kingdom -	349,612	Hong Kong and China ((*a*) only).	43,071
				India ((*a*) only) -	8,878	Germany - -	68,629
						France - -	31,326
			933,347			Austria - -	11,277
						Belgium - -	16,985
						United States -	78,455
						Holland - -	84,502
						Italy - - -	36,667
						Other - -	3,950
						Total - -	374,862
	(*a*) (*b*), and (*c*) -	1884	(*a*)148,588 (*b*) and (*c*) 431,974	United Kingdom -	415,623	Hong Kong and China ((*a*) only).	41,216
				India ((*a*) only) -	1,502	Germany - -	47,756
				Austria - -	3,565	France - -	14,817
			580,562			Austria - -	3,837
						Belgium - -	10,708
						United States -	2,810
						Holland - -	21,260
						Italy - - -	15,963
						Other - -	1,505
						Total - -	159,872

No.	Commodity.	Year.	Total Value of Importation in Dollars.	Value of the larger Imports from the United Kingdom and British Possessions.		Value of Imports from Foreign Countries in Dollars.	
	Provisions not otherwise detailed—*cont.*		$		$		$
	(*d*) Hams and bacons (European).	1894	82,132	United Kingdom -	68,416	Germany - -	13,447
				Austria - -	125	Other - - -	144
						Total - -	13,591
		1889	24,714	United Kingdom -	17,993	Germany - -	3,555
						Other - -	3,166
						Total - -	6,721
		1884	10,012	United Kingdom -	8,277	Other - - -	1,735
54	Silk Manufactures:						
	(*a*) Piece goods, pure and mixed.	1894	1,857,890	United Kingdom -	28,348	Hong Kong and China -	1,460,197
				India - - -	35,875	Japan - - -	47,115
						Austria - - -	4,215
						France - -	189,440
						Germany - -	80,588
						Holland - -	6,120
						Italy - - -	5,100
						Siam - - -	97,171
						Other - - -	3,771
						Total - -	1,793,667
		1889	1,786,368	United Kingdom -	34,466	Hong Kong and China	1,505,465
				India - - -	42,385	Japan - - -	8,000
						France - - -	124,190
						Germany - -	15,320
						Belgium - - -	3,556
						French Indo-China -	7,535
						Siam - - -	37,005
						Other - - -	8,446
						Total - -	1,709,517
		1884	1,199,848	United Kingdom -	3,789	Hong Kong and China	1,003,930
				India - - -	86,380	Austria - -	5,280
						France - - -	74,996
						Germany - -	9,679
						Siam - - -	11,195
						Other - - -	4,649
						Total - -	1,109,679
	(*b*) Silk thread -	1894	84,968	United Kingdom -	425	Hong Kong and China	69,806
						French Indo-China -	14,718
						Total - -	84,518
		1889	69,439	- - -	—	Hong Kong and China	69,139
						Other - - -	300
						Total - -	69,439
		1884	233,135	United Kingdom -	30	Hong Kong and China	222,895
						France - -	210
						Total - -	223,105
56	Soap and soda -	1894	131,620	United Kingdom -	81,663	Hong Kong - -	11,713
				India - - -	3,328	Belgium - -	3,660
						Japan - - -	29,252
						Other - - -	1,908
						Total - -	46,533
		1889	32,558	United Kingdom -	22,818	Hong Kong - -	3,285
				India - - -	3,690	Other - - -	2,555
						Total - -	5,840
		1884	40,250	United Kingdom -	29,699	Hong Kong - -	4,016
				India - - -	1,794	Belgium - -	2,160
						Germany - -	1,845
						Other - - -	736
						Total -	8,757

STRAITS SETTLEMENTS.

No.	Commodity.	Year.	Total Value of Importation in Dollars.	Value of the larger Imports from the United Kingdom and British Possessions.		Value of Imports from Foreign Countries in Dollars.	
			$		$		$
57	Spirits : (b) Brandy -	1894	485,886	United Kingdom -	325,514	Belgium - -	12,885
						France - -	97,879
						Germany - -	46,972
						Holland - - -	1,274
						Other - - -	1,074
						Total - -	160,084
		1889	447,209	United Kingdom -	286,506	Belgium - -	2,400
						France - - -	93,869
						Germany - -	46,779
						Holland - - -	5,834
						Other - - -	4,821
						Total - -	160,703
		1884	228,815	United Kingdom -	152,543	Belgium - -	10,675
						France - - -	56,850
						Germany - -	5,475
						Other - - -	2,743
						Total - -	75,743
	(c) Gin - -	1894	265,560	United Kingdom -	51,499	Belgium - - -	45,857
						Germany - -	2,818
						Holland - - -	165,623
						Other - - -	164
						Total - -	213,956
		1889	225,609	United Kingdom -	106,861	Belgium - -	26,454
						Germany - -	7,381
						Holland - -	84,933
						Other - - -	200
						Total - -	118,968
		1884	221,981	United Kingdom -	104,757	Belgium - - -	69,956
						Germany - -	1,356
						Holland - - -	45,312
						Total - -	116,624
	(d) Liqueurs -	1894	16,813	United Kingdom -	6,295	France - - -	2,811
						Germany - -	4,625
						Holland - - -	1,200
						Other - - -	1,342
						Total - -	9,878
		1889	6,832	United Kingdom -	3,695	France - - -	555
						Germany - -	2,065
						Holland - -	492
						Other - - -	15
						Total - -	3,097
		1884	3,877	United Kingdom -	1,475	France - - -	638
						Germany - -	589
						Other - - -	1,178
						Total - -	2,402

No.	Commodity.	Year.	Total Value of Importation in Dollars.	Value of the larger Imports from the United Kingdom and British Possessions.		Value of Imports from Foreign Countries in Dollars.	
			$		$		$
58	Stationery - -	1894	184,235	United Kingdom -	119,353	Austria - -	25,880
						Belgium - -	8,440
						France - -	3,520
						Germany - -	15,740
						Holland - -	1,990
						Hong Kong and Japan	5,674
						Other - - -	1,788
						Total - -	63,032
		1889	114,068	United Kingdom -	86,168	Austria - -	6,400
						Belgium - - -	6,176
						France - -	1,990
						Germany - -	6,234
						Holland - -	1,120
						Hong Kong and Japan	1,760
						Other - - -	4,165
						Total - -	27,145
		1884	91,962	United Kingdom -	79,547	Belgium - -	5,735
						France - - -	1,330
						Germany - -	4,655
						Other - - -	185
						Total - -	11,905
59	Stones:						
	(*a*) Marble -	1894	7,285	United Kingdom -	230	Italy - - -	5,225
						Other - - -	1,595
						Total - -	6,820
		1889	15,707	United Kingdom -	720	Italy - - -	6,835
						France - -	4,390
						Other - - -	3,762
						Total - -	14,987
		1884	8,814	United Kingdom -	1,359	Italy - - -	4,470
						Germany - -	1,250
						Other - - -	990
						Total - -	6,710
	(*b*) Other sorts -	1894	30,467	United Kingdom -	10,385	Hong Kong and China	11,796
				India - - -	6,122	Other - -	2,184
						Total - -	13,930
		1889	84,249	United Kingdom -	2,634	Hong Kong and China	21,910
				India - - -	56,094	Other - - -	3,599
						Total - -	25,509
		1884	82,811	United Kingdom -	1,118	Hong Kong and China	11,154
				India - - -	18,885	Other - - -	1,654
						Total - -	12,808
63	Umbrellas and parasols, alpaca, cotton, paper, and silk.	1894	565,902	United Kingdom -	3,403	Hong Kong and Japan	492,565
				India - - -	2,260	China - - -	18,607
						France - -	46,599
						Other - - -	2,468
						Total - -	560,239
		1889	491,931	United Kingdom -	195,055	Hong Kong and Japan	274,826
						China - - -	5,524
						France - -	4,870
						Germany - -	4,687
						Other - -	5,889
						Total - -	295,796
		1884	572,145	United Kingdom -	259,800	Hong Kong - -	276,570
						France - -	7,070
						Germany - -	24,410
						Other - -	3,029
						Total - -	311,079

STRAITS SETTLEMENTS.

No.	Commodity.	Year.	Total Value of Importation in Dollars.	Value of the larger Imports from the United Kingdom and British Possessions.		Value of Imports from Foreign Countries in Dollars.	
			$		$		$
67	Woollen and worsted manufactures: (*a*), (*b*), (*c*), (*e*) woollen cloth, pure and mixed.	1894	606,402	United Kingdom -	292,436	Austria - -	10,640
				India - - -	2,838	Belgium -	6,800
						France - -	18,060
						Germany - -	268,353
						Holland - -	2,320
						Hong Kong - -	2,270
						Other - -	2,690
						Total - -	311,138
		1889	648,926	United Kingdom -	436,936	Austria - -	6,327
				India - - -	35,925	Belgium - - -	13,530
						France - -	21,455
						Germany - -	129,263
						Other - - -	5,491
						Total - -	176,065
		1884	358,490	United Kingdom -	227,089	Austria - -	2,500
				India - - -	1,190	Belgium - - -	15,610
						France - -	5,396
						Germany - -	104,985
						Other - - -	1,770
						Total - -	130,261
	(*d*) Blankets, woollen and mixed.	1894	116,795	United Kingdom -	60,658	Hong Kong and Japan	40,797
						Germany - -	13,805
						Other - - -	1,535
						Total - -	56,137
		1889	106,648	United Kingdom -	82,606	Hong Kong - -	10,760
				India - - -	1,795	France - -	4,400
						Germany - -	2,570
						Philippines - -	4,130
						Other - - -	387
						Total - -	22,247
		1884	81,102	United Kingdom -	69,542	Hong Kong - -	3,265
						Germany - -	7,295
						Other - - -	1,000
						Total -	11,560
	(*f*) and (*g*) Woollen goods of all other sorts.	1894	54,018	United Kingdom -	18,661	Germany - -	29,699
						Other - - -	3,620
						Total - -	33,319
		1889	13,149	United Kingdom -	11,394	Other - - -	1,705
		1884	79,137	United Kingdom -	54,520	Germany - -	21,137
						Other - - -	3,480
						Total - -	24,617

ADDITIONAL LIST of COMMODITIES as contained in the SCHEDULE of SUGGESTIONS in ANNEXE III.

No.	Commodity.	Year.	Total Value of Importation in Dollars.	Value of the larger Imports from the United Kingdom and British Possessions.		Value of Imports from Foreign Countries in Dollars.	
			$		$		$
30	Hardware: Tinware - -	1894	55,676	United Kingdom -	39,550	Germany - -	11,714
						Other - - -	3,202
						Total - -	14,916
		1889	30,370	United Kingdom -	24,700	Germany - -	2,674
						Other - - -	2,616
						Total - -	5,290
		1884	31,300	United Kingdom -	21,920	Germany - -	3,250
						Belgium - - -	5,410
						Other - - -	720
						Total - -	9,380
37	Machinery: Gas and electric lighting materials.	1894	22,367	United Kingdom -	15,557	United States - -	6,760
						Other - - -	100
						Total - -	6,800
		1889	4,908	United Kingdom -	4,908		
		1884	3,052	United Kingdom -	3,052		
48	Plated ware: Jewellery and personal ornaments. (So far as declared only.)	1894	60,215 (chiefly from Asiatic countries.)	United Kingdom -	6,875	Continent - -	6,500
		1889	84,078	United Kingdom -	18,562	Continent - -	4,511
		1884	84,798	United Kingdom -	2,625	Continent - -	4,067
68	(*b*) Wines: (*a*) Champagne -	1894	85,970	United Kingdom -	27,925	Continent - -	57,435
		1889	112,341	United Kingdom -	31,589	Continent - -	76,429
		1884	52,415	United Kingdom -	38,221	Continent - -	14,179
	(*b*) Claret - -	1894	95,810	United Kingdom -	10,818	Continent - -	81,060
				Australia - -	1,806		
		1889	106,790	United Kingdom -	9,845	Continent - -	94,721
				Australia - -	545		
		1884	45,895	United Kingdom -	19,120	Continent - -	26,563
	(*c*) Port - -	1894	135,695	United Kingdom -	29,642	Continent - -	102,842
				Australia - -	2,159		
		1889	76,650	United Kingdom -	50,045	Continent - -	23,301
				Australia - -	870		
		1884	16,314	United Kingdom -	12,116	Continent - -	3,620
	(*d*) Sherry - -	1894	31,969	United Kingdom -	8,745	Continent - -	22,134
				Australia - -	665		
		1889.	41,759	United Kingdom -	16,623	Continent - -	22,456
		1884	79,721	United Kingdom -	37,498	Continent - -	39,363
	(*e*) Other sorts -	1894	98,269	United Kingdom -	7,713	Continent - -	87,100
				Australia - -	1,260		
		1889	77,803	United Kingdom -	15,625	Continent - -	61,663
		1884	9,501	United Kingdom -	4,635	Continent - -	4,511

ANNEXES II. AND III.

13. The prices quoted below are for goods of foreign make, which compete with British manufactures. These when stated in dollar values are based on an exchange of 2*s.* 2*d.*, 4 months' sight Bank Bills. The pikul = 133⅓ lbs., or 16·8 pikuls per ton.

[*All prices represent wholesale quotations in Singapore.*]

(2.) ANIMALS.—*Horses and ponies.*—Supples from Australia are on the increase, but there will always be a demand for Deli and Java ponies, which are cheap, hardy, and involve no risk from change of climate. The prices in the returns are *pro rata*, especially as regards Australian horses brought for auction, which have no fixed market price. The ponies from the Dutch Indies are chiefly used for public conveyances, and range in price from $30 to $250, the Deli animal costing from $150 to $250, and that from Java from $60 to $120.

(3.) APPAREL, HOSIERY, MILLINERY, HABERDASHERY, AND SMALLWARES.—The imports from China, Hong Kong and Japan are largely ready-made *bajus* (coats) and trousers. The latter are mostly made of silk and cost about $3 each, while the jackets are mixed or of cotton only. The Continental imports embrace all classes of goods included under the above heading, and especially undershirts and socks. The China-made clothing is a trade in which Europe has never attempted to enter, but the large increased supplies have had the effect of lessening the sale of English cottons such as T-cloths, which cannot be sold cheaper in the piece than the cost of the sewn article. Japan sent direct, chiefly undershirts, to the value of $192,621 in 1891, compared with a value of $7,800 in 1889, and nil in 1884; but it is from Hong Kong that the Straits Settlements draw their supplies of Japanese and Chinese manufactures, and therefore the direct imports from Japan fall short of the actual amount received

(*a*) *Singlets or Undershirts.*—The Saxony singlet practically carries all before it, as a good article at a fair price, and it is only in the inferior grades that as yet Japan offers serious competition. The trade has been German for many years, and importations from the United Kingdom have always largely been of German origin. The Saxony singlet, known in the market as (104) for quality and finish, leaves little to be desired. Nottingham since 1889 has been sending out excellent imitations of lower priced German at about the same price, but in the (104) type she cannot produce much under 1*s.* per dozen higher.

Japanese singlets are of poor quality, but the absurdly low prices have forced a good sale, and it is probably only a question of time before better qualities are produced. The prices per dozen of Continental singlets range from $2·25, $2 50, $3, $3·50, $3·75, $4·25, $4·57½, $5, $6, $6·75 and up to $7·50. The (104) article at from $5·25 to $6·75, according to size, sells very well, and there is also a good business in lower qualities.

The prices of Japanese singlets vary from 72½ cents for children's size, to $1, $1·25, $1·35 and $1·50 per dozen.

(*b*) *Socks.*—The large business done is in German socks, which are excellent in style and finish at the higher prices, and there is only a limited sale of English at high prices. Japan has, however, come into the field with low qualities.

The prices per dozen of Continental socks begin at $1·10, $2, $2·50 and rise to $3 and $4. The $2·50 article is largely sold and is a fairly good sock.

The prices of Japanese socks start at 34 cents per dozen children's size, and rise to 75 cents, $1, $1·25, $1·40, $1·75, $2 to $2·20 according to quality.

(*c*) *Towels.*—The Continent had nearly driven the English towels from the market, and in turn has been ousted by the Japanese article. Prices—Continental 19/38, $1·60 per dozen; 27/56, $3·75; 45/80, $9. Prices—Japanese, per dozen: 12/24, 65 cents; 16/24, $1·10; 16/36, $1·25; 16/42, $1·65; 12/37, $1·50; 19·56, $3; 28/60, $3·20; 19·65, $3·80; and 36/80, $5·20.

(*d*) *Buttons, Belts, Needles, &c.*—Buttons M.O.P. common, vest, 85 cents to $1·75 per gross, coat size $2 per gross.

Porcelain small shirts, 34 cents per great gross. French glass 95 cents to $1 per gross.

Belts cotton, Austrian, $10 per gross; French, $12 per gross. Fair $2·65 and $3 per dozen, better qualities $4 to $12.

Needles, German 1, 2, 3, and 4, assorted sizes, silver eyed, sharps, $1·62½ per packet of 10,000 containing probably 8,000. The needles in fancy cases with eight holes

for sizes, containing 50 needles and 100 needles, sell very largely, they are imported from England.

German gilt heads sell at $4 per 8,000.

Dutch shawls at $25·30 per 20 pieces sell; and others at from $17 to $20 per corge of 20 pieces are received from Germany.

(4) ARMS AND AMMUNITION:

(*a*).—*Muskets, Rifles, and Fowling Pieces, &c.*—The well-known Winchester repeating rifles and Belgian rifles are preferred to English designs, while in other classes cheapness is the sole consideration, and Belgium and Germany do a business in altering old muskets more to modern requirements.

Prices—American Winchester, $23 each; Spencer's $11 each. Prices—Continental, Mauser, $22; Sniders altered in Belgium, $8·50.

Fowling pieces from $12 upwards, fair sales $20 to $35. Saloon rifles, $2·50, $4·50 and $6·50 up to $12. Muzzle loaders, $2·50. Flintlocks from $15 per corge of 20 pieces. Pistols and revolvers are almost entirely American and Belgian.

American Colts sell from $18 to $25, and Belgian Bulldog 450, 380, and 320 bores, $36 per dozen, and if self-extracting, all bores, from $40 to $60 per dozen.

(*b*) *Gunpowder.*—Singapore supplies are from United Kingdom only. A few years ago German gunpowder attempted but failed to take the market. I am not acquainted with the reasons for Penang imports of German gunpowder.

(6.) BEER AND ALE.—The Continental beer is lighter and more suitable for the tropics than the heavier British liquor, and several brands are fully cheaper than Bass's or Allsopp's. Scotch ale has a fair and increasing demand.

Prices of continental beer, $8·75, $9, $10·75 and $11, up to $14·50, according to brand, per 7 dozen pints. Quarts are slightly cheaper proportionally.

Japan and Australian beer have, so far, failed to take the market.

(7.) BISCUITS.—The very best qualities are English, and there is always a fair demand for these, but German biscuits prevail in the bazaar, meeting with Scotch brands which, however, are falling off. The prices are, if anything, in favour of the German product but I am of opinion that it is more a question of energy of the agents here, and the enterprise of the Continental manufacturer in designing fancy tins, than of price. It is claimed for the foreign article that it keeps harder and better for a longer period after the tin has been opened, and that altogether it is a better biscuit for the money. Australian biscuits have not been a success, largely owing to want of experience in the process of tinning. Biscuits are now being made locally, and the inferior foreign brands will, in all probability, be ousted in a year or two.

Prices of German biscuits per tin, ½ lb. 12½ cents; 1 lb. 18½ cents to 18¾ cents; 2 lbs. 33½ cents; 4 lbs. seldom taken; 8 lbs. $1·05 to $1·07½. In fancy designed tins prices are for ½ lb. 15½ cents and increase proportionally. The popular kinds are Gem and Combination, and in 8 lb. tins Cabin.

(9.) BOOKS AND MAPS.—The Indian imports are principally religious books in Arabic characters, and are largely sent to Java and other places having Mohammedan populations. The spread of English education favours books written in the English character and it is only in a very cheap class of novels and a few scientific publications that the United States comes in.

(10.) BUTTER AND CHEESE.—Butter is, with the exception of Australian and a little Indian, just coming in, the produce of the Continent. Irish butter has been in the market, but its price was against it.

Australian butter has a future before it, and is progressing, but it is necessarily some time before purchasers can be induced to change the brand which they are accustomed to.

Prices:—Danish 1 lb. 60 cents; 2 lbs. $1·12½ to $1·15.
French, (Bretel Frères) do. do.
French, (Other) 1 lb. 50 to 52 cents; 2 lbs. $1.
Dutch, 1 lb, 62 cents; 2 lbs. $1·12½.
Italian, 1 lb. 55 to 57½ cents.

Cheese.—Dutch cheese suits the taste of the market better, and is cheaper than Cheddar and Australian by about 8 cents per pound. Price per lb. 26 cents; per dozen red balls each from 3½ lbs. $12·25.

(11.) CANDLES.—With the exception of a limited sale of Price's English candles, the trade is with the Continent so far as ordinary wax candles are concerned. Hong Kong and

Japan imports have been and frequently are Chinese candles, but it is also probable that white wax has been so declared. English candles of medium quality have been tried, but after a time they become soft and lose their stiffness.

Prices of Continental per 25 packets 7½/10 ozs. $2·30 to $2·80, according to weight; 4/5 ozs. $1·20 to $1·60.

(14.) CEMENT.—Portland cement is better in quality and about as cheap as foreign cement. It has been found more convenient and in the end more economical by some planters and others to have the cement packed in iron drums, and this has been met to some extent by foreign importers, but the trade will always be a special and small one, and is not put forward as a recommendation for general practice.

(16.) CHEMICALS.—Disinfectants are nearly all English, but some acids and spirits of wine are from the Continent chiefly for retail by German houses. Sulphate of copper is received from Japan, and lately sulphuric acid has come from thence.

(18.) CLOCKS AND WATCHES.—English clocks are high priced and seldom seen. American clocks are cheap and splendid time-keepers. High class French clocks have a small sale, and cheap German clocks have supplied the bazaar. Japan has entered into this business and has captured the demand for inferior goods, but they have not a good name as time-keepers.

Prices :—American (Gothic) small $65 per dozen; (Office) 10-inch face $80.
Japanese do. $52 do. do. $48 to $52.
Do. do. do. 7½ inch face $40.
German makes range from $2·40 to $6·50 each.

Watches are mostly of Swiss make, the English lever commanding a small sale. American of a very cheap class find their way into the market, but are met by as low a quality of Swiss, quoted at $3·50 each.

(19.) COAL.—The enormous increase in Japan coal imported into the Colony is largely attributable to its cheapness, which arises from low freights and cheap labour, but the currency is also an important factor. Steamers arriving in China for tea, before supplies are ready find that it will pay them to run down to Singapore with coal in the interval, and they bring shipments at as low rates as from $1·50 to $2 per ton. Again, ships which have failed to get full cargoes, fill up with coal at equally low rates.

Local steamers running short distances find Japan coal more economical, and where the bunkers are not filled up with Japan alone, then a mixture is taken. Labuan and Sarawak coal is also mixed with Cardiff, and for this class freights only slightly exceed those from Japan. Australian coal is handicapped with freight charges running from 8*s.* and as the price compares unfavourably with the best qualities of Japanese, this trade has been curtailed. So far Bengal coal has not been much put on the market and has chiefly been used in vessels trading between the Colony and India. The freight is calculated at about Rs. 3 to Rs. 4 per ton and there is evidence just now of the beginning of a good trade in this coal. Opinions differ as to the proportional burning qualities of the different kinds, but no doubt the large steamship companies at home have entered fully into this question. The following estimate is, at any rate, fairly accurate :—10 tons Cardiff=12 tons Australian=12½ tons Japan (Miike)=13 tons Japan=13 tons Labuan and Sarawak.

Prices :—Cardiff $11·50 *ex* wharf, 22*s.* dis. and 23*s.* spot str.
Australian $7·75 to $8·50 *ex* wharf, 15*s.* *ex* str. last price.
Japan (Miike) $8.50 *ex* wharf.
Japan (Other) $7 to $7·50 *ex* wharf, $6 *ex* str.
Sarawak and Labuan $6 *ex* wharf.
Bengal $7 to $7·50 *ex* wharf.

(20.) CORDAGE AND TWINE.—The 1894 returns under this class contain hemp thread or twine from China which in 1889 and 1884 seems to have been inserted under sewing thread.

Manila rope is made in Hong Kong and the supplies are from thence and the Philippines. Europe rope is nearly all English. The trade in coir rope is with Asiatic countries only.

With the exception of a little ball twine from the Continent, quoted at 7¾ cents per lb., hemp twine from Hong Kong, and jute twine from Calcutta, the trade is with the United Kingdom.

(21.) CORN.—(*b*) *Wheat Flour.* The wheat flour in the market is American, brought from Hong Kong, in which place it is purchased for Singapore dealers. Australia cannot

compete in price with the best qualities, and at present it has practically no sale. A very small quantity of Austrian at about 8 cents per lb. finds a sale, and Indian bakers import a little from Calcutta.

Prices:—American (U.S.) 49 lb. bag Sperry's and Crown brands, $1·80; lower qualities from $1·15 up.

(22.) COTTON YARN.—(*b*) *Dyed Yarn.* This class of yarn of Swiss manufacture is increasing its hold on the market, and in 1895 nearly 30 per cent. of the imports were of Swiss origin. The colour is almost entirely red, and a special shade is obtained which the Glasgow dyers cannot hit owing to climatic or other causes. The price is lower than the English yarn, which is at least $4 per bale higher than the best Swiss and about $10 per bale above the price of lower foreign qualities. The labels on the bales of foreign yarn have the weights marked after the dyeing has been completed, while the weights of the British article are those prior to the process of dyeing. Short lengths are common especially in Swiss yarn sent to Siam and the outports. The question of short weight will, however, rectify itself in time for it is not to be supposed that buyers, after experience, will not either discriminate more carefully on purchase or make allowance in price for what is short. It is a matter of surprise how Switzerland, a country having no seaboard, and which must depend mainly on its water power, can compete successfully with the United Kingdom.

(23.) COTTON MANUFACTURES:—

(*a*) *Piece Goods, Plain (White and Grey).* In plain cottons, Manchester holds it own with very little opposition in staples such as shirtings, tea-cloths, supers, drills, sheetings, and cambrics. Japan offers a show of low qualities chiefly crepes, in pieces sized 18 inches wide by 13, at 60 cents to $1; 27 inches wide by 20 at from $2·50 to $3, and 30 inches wide by 20, best quality, at $4.

In supers the large trade formerly done with Saigon from Singapore, after the refusal of the French Government to apply the minimum tariff clause, was carried on direct from home, but owing to the high tariff this trade has been cut out by French supers, which though of better quality are able to be sold so much cheaper as to practically close the market to the British manufacture. For outports a little American and Dutch drills find a market. These latter do not attract damp so readily as those of English manufacture, probably owing to better preparation, but the qualities are lower and the article cheaper than the English. Indian drills find a certain sale on account of cheapness but all Indian cloths are of a heavy description, and the manufacturers do not seem to be able to produce the finer kinds. In white cottons a certain finish is got in Continental makes which cannot be obtained in England, but this is no new development. It is in small special lines that the Continental is a factor. For remarks on tea-cloths see Apparel, &c., No. 3.

(*b*) *Piece Goods (Dyed and Printed).*—There has always been an import of turkey red cambrics from the Continent partly owing to a special dye and partly owing to the size 42 inches (4¾ lbs.) which the British manufacturer cannot touch in price, and which size he does not make. Scotch and Manchester are the favourites, followed close, however, by the Swiss, but the dye is not fast. In turkey red mulls and turkey red prints only a small trade is done. In other prints there has been a serious falling off in the 1895 sales amounting to 45 per cent., accounted for by the increase in price and Japan crepes taking its place. English turkey red chintz at about $3·50 are cutting into the Swiss trade, but it is in *batek* prints that the latter are strong, being blocked by hand, and the attempt of English manufacturers to print by machinery, while producing a much cheaper article, has failed, as yet, to touch the right shade.

The business in fancy cottons with special designs which has been almost monopolised by the Continent is now being met by a steadily increasing English import. China is attempting to make imitations of Shanghai cloth in turkey red and these are slowly coming in. Japan does a small trade in dyed woven goods. It is in this class of goods that the Continental manufacturer shows enterprise, and takes the utmost trouble with samples and designs, and is prepared to send small assorted orders in hopes of further business.

(*b*, *d*, and *e*) *Socks, Lace, and Hosiery.*—See Apparel, &c., No. 3.

(*c*) *Sewing Thread.*—In the 1894 returns hemp thread or twine from China and Hong Kong has not been inserted as sewing thread, and after applying this explanation it will be seen that not 5 per cent. of cotton thread is foreign, and in that class misrepresentation of lengths is the rule.

(*f*) *Sarongs, Slendangs, and Kains.*—The remarks on prints largely apply to *sarongs*. The Continent has got a grip of the trade, having been longer at the work,

and can produce the desired shades, but English woven sarongs are now showing well up as regards sales. Printed sarongs are largely English, imitation *batek* Dutch and German, and woven sarongs Swiss.

The real *bateks* are imported from Java, and *Pulicat* sarongs from Southern India. Cheap narrow cloth such as nankins are included under kains.

(*g*) *Cotton Blankets.*—The ordinary waste blankets at about 30 cents each are British, but the more expensive coloured designs are Continental, as well as cotton covers in which a large trade was formerly done. Japan has entered the market with cheap designs at $12 per 20 pieces blue, and $16 black. German coloured patterns sell at from $1·50 to $5 each, and Austrian from $1, 2 lbs. weight $1·75 up according to weight.

(*h*) *Handkerchiefs.*—The small business in plain white handkerchiefs is chiefly a retail one. The bordered and figured handkerchiefs from Glasgow suit the market and no foreign article comes near them for fancy designs, while they are as cheap as any of European manufacture. The returns include silk handkerchiefs from Japan and Hong Kong and when these are taken off it will be seen the imports are British. Lately, however, Japan has commenced sending down imitations of the Glasgow patterns in crape and cambrics size 12 by 12, 30 cents per dozen; larger sizes 35 to 40 cents.

(24.) EARTHEN AND CHINAWARE.—From China enormous quantities of cheap crockery ware are imported in junks which carry on a yearly trade with Singapore in cups, bowls, jars, spoons, &c. The Continent follows and does a large business in cups and plates mostly of Dutch and German make; these are slightly cheaper than Scotch plates, and are probably better packed, while freights are in their favour. The trade in cups and bowls has been cut into by the Chinese, and prices are far from remunerative. Toilet services and earthenware drain pipes are from England and a good proportion of the best class of tea sets and dinner sets. Hong Kong and Calcutta also supply drain pipes.

Prices:—Continental—Cups and saucers 54 to 62 cents per dozen rising to $1 according to quality. Plates 8½ inches, printed, 75 cents per dozen; 9½ inches, 86 cents; 8½ inches, white, 62 cents; 9½ inches, 72 cents; 7½ inches, 48 cents; and 6½ inches, 38 cents. Bowls white, 73 cents per dozen; assorted sizes printed, 85 cents to $1.

(26.) CABINETWARE.—Under this class has been included all furniture, not metal, and pictures, mirrors, boxes, toilet glasses, besides fancy goods and toys. In 1895 fancy goods and toys have been treated as a separate class and the total imports of such amount to about $180,000, of which Germany contributes about $40,000 and the United Kingdom about $47,000. Hong Kong and Japan have a very large trade in these articles. Furniture proper is largely of local manufacture and is sold much cheaper than it could be imported for. There are occasionally, however, consignments from Europe; and Austrian bentwood chairs have a large sale. Teak and seriah woods are manipulated here, and Chinese manufacture different kinds of rattan furniture, chiefly chairs in pretty designs.

Mirrors, with the exception of toilet glasses and panels, are imported from the Continent. Prices in gilt frames well finished 21 by 13, $36 per dozen; 30 by 18, $84 per dozen. Small hand mirrors wooden frames from Germany sell 6 by 4 for 60 cents per dozen and larger sizes in proportion. A large business is done in Continental mirror boxes in fancy designs which are used by natives for holding tobacco, pins, &c., they are of various sizes, round shaped, mirror topped, sizes from 1½ inches face, 2 inches, and 3 inches, at from $2 per gross to $2·50 and $3. Japan looking-glasses now sell largely and in small sizes are gaining ground. They are priced as follows:—In wooden frames 7 inches by 3½, 75 cents per dozen; 8 by 4, 85 cents; 10 by 4½, 90 cents; 12 by 5, $1·10; 14 by 5½, $1·50. In gilt prices are also very cheap.

Pictures are entirely Continental, as also are moldings, but prices would be of no value without samples. Toys are, as a matter of common knowledge, known to be Continental, though parts, such as dolls' eyes, are of English manufacture. Japanese toys are inferior, but the prices are absurdly low. Fine screens and wall ornaments are Japanese. Druggists' ware and fancy lines connected therewith are from the United Kingdom and France.

(27.) (*a*) GLASS AND GLASSWARE.—Bottles imported for aërated water factories are from the United Kingdom, as well as chemists' bottles, but a good deal of stoppered and druggists' bottles are from the Continent.

(*b*) A large trade is done in lamp chimneys of Belgian and German make. Small, table size about 1¼ inches diameter at base, sell from 24½ to 30 cents per dozen, according to quality, and larger sizes both for table and hanging lamps vary in prices from $1·20 to $2 according to size and quality. Glass lamps are entirely foreign. Hanging lamps 16 inches shade are quoted at $4·60 per dozen; other better qualities are, as a rule, declared under brassware. Japan is competing in glass table lamps at from $2·70 to $8 per dozen according to size.

(*c*) In tumblers, glasses, &c., Belgium is to the front. Thick coarse tumblers are quoted at 40 to 42½ cents per dozen; ½ pints better qualities, 70 and 85 cents per dozen; and good Austrian $1·30 and $1·50. Water bottles sell at $15 per hundred; sugar basins $9 to $12 per hundred; liqueur and wine glasses from 22 to 30 cents per dozen. In window glass Belgian quotes at $3·90 per 100 superficial feet, or about 60 cents cheaper than English. India is beginning to send water bottles and tumblers, but as yet the trade is small. Japan has exported to the Colony a little glassware, but the prices do not compare favourably with cheap Continental makes, and little business is being done.

(30.) HARDWARE AND CUTLERY:

(*a*) *Cutlery.*—German commercial travellers visit the market and push sales, especially in scissors and pocket knives, as well as hollow-ground razors. Household cutlery and solid razors are chiefly English and this is true of the very cheapest class of razor, the native purchaser preferring the Sheffield names. Native pruning knives are from Germany at from 90 cents to $1·10 per dozen of 4½ inch to 6 inch lengths, but native forges are now largely supplying the demand at killing prices. Pocket knives are quoted from 70 cents to $10 per dozen, according to quality, and the very dear priced are Sheffield. Scissors quote from 95 cents to $12·75 per dozen. The numerous sizes and descriptions prevent particular quotations being given.

(*b*) *Files.*—German files sell largely, and the following are the descriptions and quotations:—Flat with points, low qualities, per dozen 4 inch, 8*d.*; 8 inch, 1*s.* 8*d.*; 10 inch, 2*s.* 6*d.*; 12 inch, 3*s.* 9*d.*; 14 inch, 5*s.* 9*d.*; 16 inch, 8*s.* Medium qualities, 4 inch, 1*s.* 7*d.*; 8 inch, 3*s.* 7*d.*; 10 inch, 5*s.* 6*d.*; 12 inch, 10*s.* 6*d.*; 14 inch, 11*s.* 6*d.* Best qualities, 4 inch, 3*s.* 2*d.*; 8 inch, 7*s.* 3*d.*; 10 inch, 10*s.* 6*d.*; 12 inch 15*s.*; 14 inch, 23*s.* Rasps 1*s.* 2*d.* (round) of two qualities. Fair quality, 4 inch, 1*s.* 3*d.*; 8 inch, 2*d.* 11*d*; 10 inch 4*s.* 6*d.*; 12 inch 7*s.* 1*d.*; 14 inch, 10*s.* Good quality, 4 inch 1*s.* 5*d.*; 8 inch, 3*s.* 6*d.*; 10 inch, 4*s.* 9*d.*; 12 inch 7*s.* 3*d.*; 14 inch, 11*s.*

(*c*) *Saws.*—Carpenter's half square without handles, low qualities, 16 inch, 6*s.* per dozen; 20 inch, 7*s.* 10*d.*; 24 inch, 9*s.* Good qualities, 16 inch, 7*s.* 9*d.*; 20 inch 10*s.* and 24 inch 12*s.* 2*d.* There are even cheaper low qualities.

Web saws without frames in two qualities.

1	inch wide,	24	inch long,	1st quality	1*s.* 3*d.*;	2nd quality	1*s.* 1*d.*
1	do.	28	do.	do.	1*s.* 6*d.*	do.	1*s.* 4*d.*
1½	do.	24	do.	do.	1*s.* 7*d.*	do.	1*s.* 3½*d.*
1½	do.	28	do.	do.	1*s.* 11*d.*	do.	1*s.* 7½*d.*

Cross-cut web straight shaped 5 feet, 13*s.* 3*d.* per dozen, and the same, belly-shaped, 4 feet, 23*s.* 6*d.*; 5 feet, 29*s.*; 6 feet, 39*s.* per dozen; good qualities have no sale.

(*d*) *Edge Tools.*—Chisels in assorted packets of one dozen from Germany sell as follows:—2 (⅜ inch), 2 (½ inch), 2 (⅝ inch), 2 (¾ inch), 2 (1 inch) and 2 (1¼ inch), 4*s.* 1*d.* Good qualities not sold. Screw drivers, English shaped, with flat yellow polished handles, per dozen, 6 inch 4*s.* 1*d.*; 8 inch 5*s.* 3*d.*, and 10 inch 6*s.* 6*d.*

Screws augers in sets of 12 are quoted 3 (⅜ inch), 3 (½ inch), 3 (⅝ inch), 2 (¾ inch, and 1 (1 inch) at 3*s.* 10*d.* assorted. Nippers medium quality, black, per dozen 5 inch, 9*s.* 6*d.*; 6 inch, 12*s.*; 7 inch, 15*s.* 2*d.* Bright polished, 5 inch, 11*s.* 2*d.*; 6 inch. 14*s.* 4*d.*; 7 inch, 16*s.* 9*d.*

(*e*) *Hollow-ware and Enamelled ware.*—Enamelled goods and several kinds of hollow-ware are chiefly from the Continent, but the best class of enamelled ware is of Midland make.

For rice bowls and bail pots see Ironware No. 40 (*h*).

(*f*) *Parangs*, a kind of large knife for clearing purposes, are from Germany and sell at from $45 to $47 per 100.

(*g*) *Cycles* are nearly all English, but there is a small demand for those of German make.

This classification includes innumerable articles and Engineer's sundries such as packings, emery powder, sandpaper, brushes, asbestos, insertion cloth, hair felt, &c. &c.

(31.) HATS, MEN'S.—The best hard and soft felts are British. German hard felts though cheaper lack the finish and shape of English, and on the other hand, Japan is sending down hard felts without lining at prices sufficient to drive all inferior competing articles from the market. Germans are quoted at from $11 to $12 per dozen and Japanese $2·50 per dozen.

German soft felts cannot touch English for finish, which keep their hold firmly and as many are sold as ever.

Japan shows soft felts of bad shapes at $2·25 per dozen and tweed cloth caps at from 80 cents to $1 per dozen. Turkish caps sell from $2·35 (Continental) to $10 (Arabian) per dozen according to quality, and Japan imitates these in prints at prices ranging from $1·60 to $1·80 per dozen.

Pith helmets and sun hats are received from India, and cork helmets from the United Kingdom.

In straw hats Continental makes are quoted from $2·80 to $9 per dozen according to quality, but the inferior classes do not compare well with English hats at $3·50 per dozen.

Japan straw hats sell from $1·50 to $3·50 per dozen according to quality. These do not retain their shapes, and are soft and pliable, especially after getting wet.

(32.) IMPLEMENTS AND TOOLS OF INDUSTRY.—In 1894 and previous years, these have been inserted under Hardware or Ironware, for which see particulars, but in 1895 a new class "Tools, Instruments, and Implements" was provided, and a value of about $155,000 imported, of which Germany sent about $56,000, Belgium $10,000, and the United Kingdom about $75,000.

(34.) LEATHER. (*b*) *Boots and Shoes.*—For men's shoes English are preferred, but Austrian shoes are cheaper and ladies' shoes from that country are better shaped than English, and at least 25 per cent cheaper. Locally made shoes, however, are cheap, and men's walking shoes are well made. It is in ladies' and children's and in slippers and special shoes that the local artisan cannot offer good shapes. Foreign canvas shoes with rubber soles are quoted from 80 cents per pair. Japanese and Indian shoes are cheaper but not so good as local made, which at $2 to $2·50 per pair retail, are fairly good.

(*c*) There are small imports of boxes and trunks from the United Kingdom and Hong Kong.

(36.) LINEN.—Drills from Germany are in the market, and table linen from the Continent, but the United Kingdom has got the trade as a whole.

(37.) MACHINERY AND PARTS.—The Continental imports are mostly implements of industry and sewing machines, particulars of which are given under Hardware and Ironware. In the supplies of machinery proper the United Kingdom fully maintains its ground. In steam engines not 5 per cent. are of foreign origin. Japan has commenced to send cotton gins to be worked by hand. Sewing machines are mostly imported from the Continent—Holland and Germany. The former are quoted from $15 to $21, and German machines of good finish sell at from $18 to $20 hand only, and from $23½ to $27½ pedal, working table and fittings. These latter can be used by hand only if desired, and are complete with modern extras, &c.

Lawn mowers are obtained from the United States because of the designs.

Large quantities of hair and leather belting from the United Kingdom are included under Machinery.

(38.) MANURE.—Fish manure is imported into Penang from Germany for the use of estates in Sumatra and the Malay Peninsula, and guano is brought from America *vid* Germany and credited to the latter country. Bone manure from Indian ports finds favour with certain planters, and Indian oil cakes are used largely on sugar estates.

(39.) MEDICINES (EUROPEAN) AND DRUGS.—Patent medicines are from the United States and France to some extent, but come through the United Kingdom. There is no reason to suppose the United Kingdom is losing ground.

Drugs are almost entirely English.

(40.) METALS: (A) *Iron.*

(*c*) Belgian bar comes into the market, and Swedish iron largely, which is better and dearer than British, or about $4·75 to $5·50 per pikul. Angle, bolt, and rod iron are English.

Wire nails are now exclusively Belgian, and it is most likely that the imports of this article from the United Kingdom are of Belgian origin. The kegs in which they are sold vary from 92 lbs. to 99 lbs. and the prices accordingly from $3·50 to $3·70 according to gauge and assortment, at which English prices are unable to compete, being from

6*d.* to 10*d.* per cwt. more. A few Americans have lately come in about the same quotations, and I have heard of Japanese, but cannot trace the article in the market.

(*e*) Small imports of German screws sell at 12½ cents per gross assorted sizes, ⅝ inch, ¾ inch, 1 inch and 1¼ inches. Swedish screws, which are quite as good as English, are quoted at from 8 to 10 per cent. cheaper.

(*h*) Ironware includes a large number of separate articles, and it is probable that importers frequently declare hardware or ironware without much discrimination. Girders for bridges and materials for construction of works, besides heavy implements such as iron rollers, are comprised under this class unless they are of steel, also nuts and engineers' ironware. Iron pans and pots are doubtless inserted under hardware and ironware, and a better idea of the whole trade is got by taking both together. See hardware No. 30 and steel No. 40 (*k*).

Barbed fencing wire from the Continent is quoted at $7 per reel of 1 cwt.

An extensive business is done in cooking pots (bail pots) and pans (rice bowls); the former are almost exclusively British, and German imitations have failed to sell, because the metal is much lighter and easier dented and cracked, though cheaper in price. Pans are being brought from the Continent, but have not as yet met with much success against the English manufacture. Axe heads, wedge-shaped, from Germany, American patterns 3½ lbs., sell at $13·25 per dozen. American axes are preferred and are said to stand the work better than English, they are a little dearer, being quoted at $14 per dozen.

Spades for estate use, square, are sold at $9 per dozen, but the sale is not large.

Hoe or changkol heads 11 inch long by 9½ inch wide are sold at 150*s.* per 100, other quotations are 6¼ by 10¼, $7·20 per dozen; 7¼ by 10¼, $7·80; and 7¼ by 11, $8·25 per dozen, but there are low qualities from $2·75 to $3·50 per dozen, weights 3 to 6 lbs. Rakes small sales, six teeth, riveted, 162*s.* per 100 are quoted, but in axes, spades, and changkols the native forges turn out large supplies at one-fourth the price of good European.

Iron padlocks are English exclusively, but the prices are so low that it is said the Continental manufacturers do not care to incur the expense of new machinery to compete at such prices.

Iron safes show fairly large imports. The very best class are by well-known English makers, but the prices are very high and a considerable proportion of the sales are in second and third rate Continental makes. Japan, however, has entered very strongly into the business at prices beyond competition. While the low priced classes are inferior, a really good safe can be got of Japanese make at greatly reduced cost to that charged for European makes.

Prices.—French, No. 1, $75.

German and Austrian, No. 0, $60; No. ½, $65; No. 1, $73; No. 2, $100; No. 3, $125; No. 4, $150; No. 5, $200; and No. 6, $250.

Japanese 20 by 18 by 16¾, $20; 21 by 15½ by 14½, $20; 22 by 18 by 16¾, $21; 24 by 18 by 16¾, $23; 27½ by 19¼ by 18, $30; and 28 by 19½ by 19, $43.

Copying presses and weighing machines are also being imported from Japan, and the latter have been found with American marks imitating the Fairbank make and name. The Continental copying presses are about 20 per cent. cheaper than English. The imports from China and Hong Kong are chiefly in large iron pans for cooking purposes, rough and cheap.

(*i* and *k*) *Steel.*—The enormous difference between the 1889 and 1894 returns under this head arises from goods of steel having been classed as ironware. The following tables of Hardware, Ironware, and Steel will show the position:—

IMPORTS.

Year.	Hardware.	Ironware.	Steel.	Total.	From United Kingdom.	From the Continent only.
	$	$	$	$	$	$
1889	790,578	518,271	25,284	1,334,133	789,083	395,443
1890	865,638	470,516	39,882	1,376,036	—	—
1891	798,685	715,515	54,149	1,568,349	—	—
1892	665,953	854,701	77,465	1,598,119	—	—
1893	821,388	636,936	58,570	1,516,894	—	—
1894	845,898	518,904	108,400	1,473,202	759,090	523,099

It is known that where iron was formerly in use steel is now preferred, being frequently as cheap and more suitable for most purposes. Of the ironware imported in 1892, $141,757 was in connection with the Malacca water-works.

Belgian, and what is known as Milan unwrought steel (Bamboo), continues to hold the market, the prices are much the same as Scotch, and it is largely a question of make, brand, and packing. It is quoted at $3·50 per cask of 90 lbs. The native prefers the kegs or cases to be bound with wooden hoops in preference to iron, and having once conceived the notion that certain marks denote superior qualities, it is a matter of indifference to him from what country the goods come.

Steel joists and beams are also brought from Belgium at very low freights, and the price of these goods at Antwerp is about 15*s.* per ton less than at Glasgow.

(*k*) Not 5 per cent. of corrugated iron is of foreign origin, but it is to be noted that foreign manufacturers have commenced to give more sheets to the case on a gauge but English cannot yet be competed with.

(*l*) Carriage axles and springs are chiefly English, although German is in the market. The great bulk of the business is in native made springs, however, so far as hired carriages are concerned.

B. *Copper :*

(*a*) *Unwrought.*—Japanese ingots have so far taken the market owing to cheapness. They are quoted at $20·25 per cwt. (g.m.b.) or about 12 per cent. cheaper than English, but complaints are made as to the quality, and they tarnish quickly, although one or two Japan brands are fairly suited to the requirements of the market.

(*b*) *Copperware.*—Japan copper nails imported have the same objection as to easy tarnishing, as well as copper wire. This class of goods from Hong Kong and China comprise ornaments of religion (joss ornaments) teapots or kettles and a class of cooking pans. Japanese composition nails are sold in Singapore for $29·50 per pikul.

In yellow metal sheathing, Belgium has practically failed in her attempt to make a market. Foreign yellow metal is sold at about $2 less per pikul than English.

(*c*) *Brassware.*—Under this class are various goods of a special kind. The imports from China and Hong Kong are brass smoking pipes, cymbals, and small goods, that from Germany is almost entirely brass lamps. In 1895 a new class "Lamps and Lampware" was inserted in the returns, and Germany sent over $120,000 value in that year. The imports of brass fittings and padlocks (lever) are almost wholly English.

German imitations of the last-named are quoted 5 levers, 2 inch, at 20*s.* 5*d.* per dozen and 2½ inch, 26*s.* 6*d.* per dozen, and lowest qualities from $2 per dozen 1 lever, 1½ inch.

Japanese brass wire is sold at $25 per pikul, but it does not retain its colour.

Lamps are of so varied designs that quotations alone are of little use. There is a very substantial difference between the prices of English and German manufactures, and it has been found that British makers are not anxious to imitate designs, and when they do so the prices are considerably in excess of those charged by their foreign rivals. The very best, for which there is always a certain sale, are English. They are solid and heavy and lack taste in the get up. In table lamps Japan has made a beginning.

Prices:—Continental hanging lamps, glass bowls, 16 inch shade, $5·60 per dozen, $6·75, and $7·25. Hanging fancy, cast iron, 28 centimeter shade, glass bowls, superior, $28 per dozen, and in metal baskets, metal bowls, 13 inch shade, fancy designs, $30 per dozen. Large 10¼ inch 40 to 42 burners metal throughout $65 per dozen. Table glass lamps are sold from $6·40 per dozen.

Japanese prices for table lamps, 6½ inch shade, are $6·50 per dozen, but low qualities, small, sell from $2·75 per dozen and rise up to $8·50 per dozen according to quality.

(*f*) ZINC OF ALL KINDS.—Of zinc sheathing the greater portion is from the Continent quoted at $11·60 per pikul, 4 feet by 14 inches, and the price varies according to weight. Belgian zinc roll and zinc sheet, 7 by 3, 9 to 18 gauge, is sold at $11·50 per pikul. Boiler plates are mostly English. Belgian zinc nails sell at $16·50 per pikul. Galvanized zinc buckets from the Continent are quoted 8½—19—13 at $2·50 per dozen.

(41.) MUSICAL INSTRUMENTS.—With the exception of a fair share in the piano imports, the business done in musical instruments is with the Continent, and in organs with America. All the smaller instruments, such as accordions, violins, melodeons, guitars,

&c., are of German or Swiss make. Accordions which sell in the bazaar are quoted for very inferior qualities as low as $9 per dozen, and fairly good ones are sold from $14 up to $36 per dozen. Japanese organs of 2 octaves, 26 inches long by 12 inches deep, are quoted from $20 to $23.

(42.) Oil and Floor Cloths are inserted in the returns under Other Sorts of cloth, see No. 67 (*b*).

(44.) Paints, Varnishes, Dyes, and Enamels.—The United Kingdom fully maintains its share of this business, and almost monopolises the field in paints except in ultramarine. It is in aniline dyes that Germany and Belgium carry everything before them, and there are large imports of blue powder for washing clothes. There are also imported German anti-fouling compositions for preservation of ships. The price of aniline dyes in ¼-lb. tins assorted per lb of 4 tins are sold as low as 35½ cents, and good qualities at from 42½ cents to 56 cents rising to 60 cents.

Ultramarine blue is quoted at $14·75 per case of 200 lbs. From China and Hong Kong vermillion and varnishes are received, and the latter are also locally made.

(45.) Paper and Paperware.—The imports from Hong Kong and China comprise various kinds of paper, such as artificial paper flowers, an enormous amount of coarse packing paper, Chinese writing paper in book form, &c.

The best paper is from the United Kingdom, whether for writing, printing, or foolscap, and the prices are proportionally high. India has recently come into the market, but the prices of Austrian of all sorts, except printing, are considerably lower than any other. Japan sends printing paper at 9 cents per lb. of 50 lbs., a price which the United Kingdom cannot touch. Belgian paper is about equally priced with Austrian.

Prices: Continental, writing note paper per ream 90 cents, $1·20, $1·70, and $2·10 according to quality. Foolscap per ream 10 lbs. $1·30 and $1·45, white 12 lbs. $1·75, and 14 lbs. $1·85. Poorer qualities from $1·05. Envelopes $1·15 per 1,000, $2·10, $3·65, and $4.

Packing paper per ream of 500 sheets $1·05, $1·45, $1·50, and $1·65. Blotting paper $6·50 per ream.

Small exercise books sell from $1·10 per gross, and cash books 15 by 3 at 22*s.* 6*d.* per gross or a little over one-half English price.

(46.) Pickles, Vinegars, and Sauces.—These goods are included under oilman's stores and are either of British or Indian origin.

(47.) Pictures.—Pictures and mouldings are exclusively Continental and are included under Cabinetware, No. 26.

(48.) Plated Ware.—German travellers attempt to push this trade, which is a small one, but purchasers do not trust the foreign makes, which are very cheap and inferior.

(49.) Provisions, Oilman's Stores, &c.—Milk, condensed, is nearly all Anglo-Swiss brands, several shipments of American (Eagle brand) having turned out bad, while the average price is considerably higher than the Swiss, which is quoted at $9·75 per case of 4 dozen tins.

Tinned jams, sauces, fish (except salmon and sardines), potted meats, vegetables, cocoa, corn flour, soups, essences, bottled fruits, and dried pickles, vinegar, &c., are from the United Kingdom. Tinned meats from the United States and Australia; vegetables and pickles from Holland; sardines from France; salmon and tinned fruits from the United States; and chutneys, &c. from India.

German hams are cheaper than English, but lately cheaper English brands have come into the market, and are better for the money. Australia has made little headway in this trade. Germany sends tinned vegetables, sardines, sausages, &c.

(51.) Salt.—Salt is imported from the Malay Peninsula and French Indo-China, and at certain seasons from Aden. The average price is from 30 cents per pikul. Bottled salt from the United Kingdom is classed as Oilman's Stores.

(54.) Silk, Manufactured.—Broad pieces are imported from France and Switzerland, and satins from Germany. This is a business which England has not laid herself out for, and Eastern countries can produce so much cheaper that it is only in a special class that Europe can participate. Silk sarongs are included, and these come from both France and Switzerland.

(56.) Soap and Soda.—European soap is almost exclusively of British manufacture, but Japan toilet soaps from $8 per pikul, rising to $15, $17, $20, $23, $25, $30, and $35 are being imported. They are of brilliant colours and in paper boxes of one dozen cakes sold at 12 cents, 15 cents, 20 cents, 25 cents and 35 cents; one case containing 3 dozen

cakes. Soap is manufactured locally and has hitherto been of a very coarse description, but the make is improving, and brown Windsor, which sells largely here, is being imitated. Australian imports are now pretty large and increasing, bar soap selling at from $2·85 per 50 lbs. Caustic soda is about 60 per cent. English and the balance Continental and latterly soda crystals have been sold to a small extent.

(57.) SPIRITS.—The class of spirit tabulated will in each case denote the origin.

The imports of brandy and gin from the United Kingdom generally have been first brought from the Continent. German brandy is a cheap and nasty spirit priced from $1.80 per case of 12 quart bottles equal to 2 gallons, and seldom costing over $3. From France and the United Kingdom the principal brands are Jules Robin and Hennessey and Courvoisier in Penang.

(58.) STATIONERY.—Germany has for long had a grip of this business, and a deal of English imports is of Austrian or German origin. Small imports for office purposes declared as stationery probably include paper and account books. German pencils low grade are priced from $1·75 per gross and rise to $3·75. Japan sends inferior qualities only at 40 cents, 60 cents. 80 cents, and $1 per gross. Cardboard, school slates, erasers, &c. are given under this class. German ink in shoe-shaped bottles sells at $1·10 per dozen bottles, but the best and that largest sold is of English make.

(59.) STONES AND SLATES.—Very little roofing slates are imported, locally made tiles supplying their place. Granite is got locally, and marble from Italy. About 10 per cent. of the grindstones imported are American and the remainder of English make. There are fair imports of tiles glazed, the business in 1894 amounting to $66,523, of which China sent $29,902, Calcutta $5,606, and the United Kingdom $26,906. Indian patent stone is brought in. The imports from the United Kingdom include bath bricks, olive stones, sharpening stones, and grindstones.

(63.) UMBRELLAS AND PARASOLS.—Japan has completely driven Glasgow and Machester umbrellas from the market. She produces a strong, well shaped article at a very low price, but the cloth is of wretched quality and not, as a rule, waterproof, which defect has had the tendency to cause a feeling in the bazaar against Japan makes. She imports the cloth and the steels from Europe and that she can offer her goods at such prices points to cost of labour as the direct cause of cheapness. French umbrellas are of silk, and a fair trade continues to be done in these. It must not be forgot that paper umbrellas are largely used and Europe has no trade in this class. Thus in 1890, the last year when separate returns were given in the different classes of umbrellas, in a total import of nearly $450,000, paper umbrellas accounted for $274,000, cloth and alpaca umbrellas for $140,000, and silk for the balance.

PRICES: (1) Paper, Japan, 85 cents to $1·80 per dozen according to quality.
(2) Cloth, Japan, $3·50, $4, $4·50, $5 to $7·50, and $8 per dozen.
(3) Silk, Japan, $15 to $16 low qualities; good $20, $25, and $30 per dozen.

(64.) WOOD AND TIMBER, MANUFACTURED.—This trade is exclusively local.

(67.) WOOLLENS, &c.—Light wool broad cloths are mostly German and are sold cheaper than English.

In Spanish stripes of low quality an increasing trade is being done in cheap German makes for use in native decorations; these are quoted 48 to 62 inch from 45 cents to 60 cents per yard.

German lastings of low qualities and at cheaper rates are also doing a limited trade, quoted 25 to 31 inch black at 32 to 40 cents per yard, and assorted from 37½ to 45 cents.

In unions and tweeds there is always a certain sale, the latter at from $1·50 to $2·65 per yard of 54 inches wide, but the Japanese are now beginning to bring in cheap tweeds and other mixtures at very low prices.

The business in long ells is dwindling, cheap yarns having taken their place. Camlets are purchased in Hong Kong by the Chinese, which owing to larger sales there, they find cheaper than buying locally. Broadcloths, unions and tweeds are largely in the hands of Madras dealers, to whom long credits are the first consideration, hence German goods are in vogue. Unions are quoted as low as 45 cents and broadcloths from 90 cents per yard to $2·75.

Only a small English trade is done in worsted coatings, and flannels are brought in small assorted consignments, chiefly from Germany.

(*d*) *Blankets.*—Germany has done a fair proportion of the sales in woollen blankets of fancy designs, but Japanese import wool from China and Australia and are sending down these goods at from $5 to $7 per corge of 20 pieces less, or 15 per cent. below Continental prices. German are quoted from 1⅝ths to 6 lbs. at $18 to $60 per 20 pieces.

(*e*) There are large imports of Berlin wool from Germany at about 80 cents per 10 ozs. and 72½ cents per 9 ozs.

Carpets and druggets are nearly all English, but jute carpets from Japan are now being brought in, quoted 12 by 12 at $12 and 6 by 3 at $2·25, and lower prices have been taken.

A. STUART,
Registrar of Imports and Exports.

Singapore, 15th February 1896.

No. 20 (A).

SIR C. B. H. MITCHELL to MR. CHAMBERLAIN.
(Received July 7, 1896.)

Government House, Singapore,
June 10, 1896.

SIR,

REFERRING to my Despatch of the 30th March last, forwarding a report on foreign imports called for by your circular despatch of 28th November 1895, I have the honour to transmit herewith a letter and its enclosures from those members of British houses which are represented in the Chamber of Commerce, Singapore, expressing the result of a careful consideration which they have bestowed on the report above quoted.

It will no doubt afford you some satisfaction to note the conclusion arrived at by the Committee in the tenth paragraph of their letter.

2. From the abundant population and the ability and artistic ingenuity of the people of Japan, the great cheapness of labour, and the fact that they practically use silver standard, I confess that I view with very great apprehension the future concurrence of that country in the market of this Colony, more especially as Japanese merchants are devoting great attention to a line of subsidised steamers (the Nippon Yusen Kaisha) which plies between Bombay and Japan, whereby cheap freights to Singapore are available for Japanese manufactures.

3. Paragraph 4 (*c*) of your circular despatch expresses a wish for the transmission of specimens of goods preferred to English ones in this Colony, provided they are not bulky.

As your despatch of 28th November last does not repeat this wish, and as goods in the hardware, earthenware, and glass trade are bulky and not easy to send, I have not transmitted any pattern or specimens, but I shall be glad to do so, if you desire it.

I have, &c.,
C. B. H. MITCHELL.

Enclosure in No. 20 (A).

MR. SHELFORD to the COLONIAL SECRETARY.

SIR,

Singapore, 6th June 1896.

I BEG to enclose report of a committee formed amongst the English members of the Chamber of Commerce, on the report of the Registrar of Imports and Exports on foreign imports, especially with regard to those articles which compete with "British manufactures."

I am to express much regret on the part of the committee that so long time has been allowed to elapse in the compiling of the report, but where so many divergent opinions were held, it was difficult to arrive at a decision fairly representing the views of the committee as a whole, and which is now claimed for this report.

I have, &c.,
T. SHELFORD.

STRAITS SETTLEMENTS.

The undersigned committee, members of English Houses, have had under careful consideration the report of the Registrar of Imports and Exports relative to "Foreign "imports, especially with regard to those articles which compete with British "manufactures."

2. They desire to recognise the evident care and pains with which the report has been framed, involving much labour, research, and inquiry, and resulting in the getting together of valuable information.

3. They are unable, however, to take the desponding view of the Registrar as to the position of the British manufacturer in this market, nor are they prepared to admit that Continental competition has led to decrease in the British trade of the Colony.

4. The figures given in the table under paragraph 2 do not bear out the Registrar's theory as to the decline of British manufactures, much less when allowance is made for the falling off in exports of cotton goods from the Colony to Cochin China since the imposition, in January 1893, of the "Tariff général," these averaging—

	$	£
For 1888–92 - - - -	1,385,000 =	319,558
„ 1893 - - - -	350,000 =	45,846
„ 1894 - - - -	407,000 =	44,091

The increase shown in same table in imports from the Continent is but small, and has been reached very gradually. The dollar value has of course increased with the fall in exchange.

The only marked increase has been in the imports from Germany, and this may well be attributed to the natural expansion of trade, through increased facilities of communication, finance, and knowledge of Eastern markets.

While the figures do not, in the opinion of the committee, show displacement of British goods, it is not disputed that in some minor articles—more especially in hardware, hollow-ware, and glassware—German and Belgium manufacturers have, for a good many years past, met with preference, mainly owing to cheaper cost, and have in some instances ousted the superior British article.

5. Referring to the causes put forward in paragraph 3 of the report as "detrimental to British industries," the committee would remark with respect to the first of these—

(*a*) "increase in sales of second and third rate qualities owing to fall in exchange,"—that experience is proving that in textiles and other manufacturers dealers are returning to the better qualities, the advance in dollar value being largely counteracted by the reduction in first cost, thus—

(*a*) White shirting, which in 1889 cost 8*s*. 9*d*. at 3*s*. 1½*d*. = $2.80, is now procurable at 6*s*. 7*d*. at 2*s*. 2*d*. = $3.04.

Corrugated iron, 28-gauge, which in 1889 cost at 3*s*. 1½*d*. = $8 per picul, in 1894 cost at 2*s*. 2*d*. = $7.75 per picul, and generally it may be remarked that home prices ranged higher in the days of high exchange, thus far upsetting the theory of the Registrar.

In metals again, pig lead, L.B., roll zinc, V.M., Govan bar iron and Muntz sheathing, still hold the field in spite of persistent competition, the difficulty as to enhanced dollar value being met by reduced cost of production.

6. With regard to the allegation (*b*)—"want of enterprise on the part of British manufacturers,"—the committee are unable to follow the report.

It may represent with greater accuracy the state of affairs some 10 years ago, or even later.

With exception of some special articles, such as sarongs, the British manufacturer had the practical command of the market. Accustomed to deal in large lines of goods which met with favour, he was inclined to under-estimate the strength and importance of the competition from the Continent. There is no doubt that in this way foreign imports have, in some instances, forestalled British manufactures and obtained a hold of the market, but all remissness of that sort is a thing of the past, and as much attention is now paid to samples, suggestions, and questions—alluded to in paragraph 5 of the report—by the London, Manchester, and Glasgow agents as by the Continental.

One notable example will serve as a strange comment on the charge of want of enterprise in the British manufacturer:—

It has been already stated that sarongs were a speciality from the Continent, seven-tenths of the import being of Swiss manufacture; but within the past few years British woven have found favour with the native: they are being imported largely, and promise gradually to supplant the Swiss article, in support of which it may be mentioned

that one of the largest German houses here is importing these goods direct from England.

So with regard to dyed yarns. A large portion of those reputed Swiss are now dyed and brought from the neighbourhood of Manchester and Glasgow.

Thus the British manufacturer appears to be meeting the Swiss on his own special ground, and the committee desire to express their opinion, derived from practical business experience, that within the last few years German manufacturers have not succeeded in continuing to wrest business in textile goods from the British.

7. With the causes advanced in the same paragraph under (*c*)—"increased shipping facilities with the Continent and cheapness of freights,"—and (*d*)—"the large number of foreign import merchants and long credit to purchasers, &c.,"—the committee generally concur. Instances are common of goods being sent from Leith to Hamburg and thence to this port, to secure a cheaper freight than procurable direct from the United Kingdom, and several articles are shipped from Mediterranean ports, such as Genoa and Trieste, for same reason.

8. The competition from Japan has, so far as appears from Annexes II. and III. of the report, been chiefly confined to those minor articles of which the Continent had already taken hold.

Cheap apparel—singlets especially—may be instanced as one of the steadily increasing imports from Japan, competing with those of German manufacture.

The British article most affected, "driven out of the market," as the report correctly puts it, has been umbrellas, and although the quality of the Japanese article is becoming more and more inferior, the great difference in cost prevents any revival of the demand for those of British manufacture.

In dyed piece-goods and yarn the Japanese imitations have been too poor to find buyers.

A tendency towards lower quality is more or less noticeable in all Japanese goods. It is evident they have yet to learn the necessity of maintaining the quality of their manufactures if they would retain any hold of the new markets into which they are at present trying to force an entrance.

9. The conclusion arrived at by the committee from perusal of the report is that it is too exclusively confined to the consideration of the hardware trade, and to the many and miscellaneous articles which form the retail and, in the aggregate, important business of the bazaar in the hands of small dealers. This business always has been largely Continental.

The British manufacturer may not have been able to compete with much of the cheap and inferior stuff offered, nor has the British merchant, as a rule, in the earlier days cared to cultivate a business which required special knowledge and attention, occupied more time, and involved larger risks than in the sale of piece goods and leading metals, which continue of British import.

10. Reviewing the position, the committee are of opinion that whilst with the expansion of trade the demand for Continental goods has extended, there is at least no further appreciable displacement of British by Continental manufactures, excepting in the lines of hardware, earthenware, and glassware, while British textiles not only maintain their hold of the market, but threaten to compete successfully with the one or two specialities which for many years had been exclusively Continental.

11. Remarks on Annexes II. and III. will be found in Appendix.

A. J. Ross (Guthrie and Company).
St. V. B. Down (The Borneo Company, Limited).
J. M, Allinson, E. Bramall, A. Booth, F. Dennys (Barlow and Company).
F. W. Barker (Gilfillan, Wood, and Company).
J. R. Cuthbertson-Boustead and Company.
T. Shelford, J. Holloway, W. Shelford (Paterson, Simon, and Company).

Singapore, 5th June 1896.

APPENDIX.

Remarks on Annexes II and III.

(6.) *Beer and Ale.*—For many years past light German beers have driven English and other heavy beers almost out of the market.

(14.) *Cement.*—Only one firm (Foreign) imports in *iron drums*. Goes hence to Sumatra where the transport is difficult.

(19.) *Coal.*—The days when steamers remained on the China Coast waiting for the tea season are past, and Japan coal freights are now ruled entirely by the quantity of tonnage offering on the coast. $1.50 is an abnormally cheap figure and rates may be said to range from $2 to $2.75 per ton.

With respect to the various proportions of consumption assigned to the different descriptions, so much depends upon the quality and manipulation of the coal by engineers that any comparison must be accepted with great caution. The general meaning of the clause that Japan and country coal are gradually working out Cardiff and other descriptions brought from gold countries is correct.

(*a*) *Cotton Yarn*—(*b*) *Dyed Yarn.*—On the contrary English and Scotch Dyed Yarns are now holding their own againt Swiss and German, owing to the trouble at last being taken to match the shades required.

Cotton manufactures:

(*a*) *Piece goods, white and grey.*—*Japanese* competition not of much moment at present, principally because the goods are scarcely what they are represented to be.

English supers can of course be made of any quality but owing to the differential tariff, French makes can now be laid down in Saigon at about the equivalent of English and in time will probably oust the English makes.

(*b*) *Piece goods (dyed and printed).*—*Turkey Red Cambrics* can be dyed any shade in England and Scotland, and are made in any width required, including 42 inches.

Battick Prints is a long credit trade, mostly with Klings.

(24.) *Earthenware and Chinaware.*—All *cups* and *bowls* from Europe are of German and Dutch manufacture.

(27.) (*b*) Japan also competes in *lamp chimneys* at from 22 to 26 cents.

Lampware almost entirely Continental (German), common qualities entirely Continental.

(30.) *Hardware and Cutlery.*—Common sorts all Continental.

(*a*) *Cutlery* generally German.

(40.) *Metals, Iron:*

(*c*) Of the import of bar—

Belgian, not 10 per cent.
Swedish, some 300 to 400 tons per annum.
Other Continental, unsaleable.

(*h*) *Ironware.*—*Hoe or Changkol heads.*—The higher prices here quoted are excessive.

(1.) *Carriage Axles and Springs*—Cheap Birmingham are mostly used for hired carriages.

(63.) *Umbrellas and Parasols.*—Japan sacrifices everything to cheapness, cloth very inferior, no protection against rain, dye comes off, sticks cut in a wet state, and refuse to open.

(67.) *Woollens, &c.:*

(*d*) *Blankets.*—Fancy designs a small trade compared with scarlet.

Notes.

1. There is no mention of *Ceresene* in the report or annexes. Formerly a Continental product, now superseded by Japanese.

2. *Cotton yarn, grey and bleached,* appears at paragraph 15 of the report as "White Twist." This is a clerical error, originating in the Blue Book Statistics for 1889.

3. In the statistics attached to the report under "value of imports from Foreign Countries," some countries are credited which did not manufacture the goods in question.

The statistics are classified strictly according to the ports of shipment, all shipments from ports in Germany as from Germany and so on. Switzerland, for example, having no port of her own, does not appear; her goods being shipped from ports in France, Belgium, Italy, and Austria appear as from those countries.

No. 20 (B).

ACTING GOVERNOR SWETTENHAM to MR. CHAMBERLAIN.

(Received Oct. 3, 1896.)

Government House, Singapore,
8th September 1896.

SIR,

REFERRING to the Governor's despatch of the 10th June last on the subject of the importation into this Colony of foreign produce, I have the honour to transmit a memorandum by the Registrar of Imports and Exports on the subject of German competition in trade with England.

The figures given show a notable advance by Germany in each decennial period since 1875.

I have, &c,
J. A. SWETTENHAM,
Governor's Deputy.

Enclosure in No. 20 (B).

MEMORANDUM by the REGISTRAR of IMPORTS and EXPORTS on GERMAN TRADE with ENGLAND.

There has appeared recently in the pages of the "New Review" a series of articles under the title "Made in Germany" with the object of showing the decline of British industrial supremacy, and the figures there set forth give conclusive evidence that Britain no longer holds the position she once did in the markets of the world. With regard to Singapore, I have been led to drawing up a comparative statement of British and German trade for the years 1875, 1885, and 1895, from which it will be seen that Germany, in what may be designated as goods of secondary importance, is rapidly increasing her exports, and that even in the most important articles Great Britain has not kept pace with the demands arising from increased population, new markets, and new wants. In looking at values only, it has to be remembered that prices have greatly decreased, in some cases by 100 per cent., but on the other hand the sterling depreciation of the dollar tends to show larger values. These facts however bear equally on both countries and therefore do not interfere with the value of the comparison. The imports of merchandise into Singapore in 1875, 1885, and 1895 were thus (assuming $1,000 as a unit):—

—	1875.	1885.	1895.
	$	$	$
From United Kingdom	8,664	14,653	15,966
From Germany	595	1,015	2,146

Therefore it is seen that for the year 1885, the value of the imports from the United Kingdom and Germany had both risen by about 70 per cent. compared with the year 1875, and in the year 1895 British imports compared with 1885 had increased in value by about 9 per cent. only while the value of German imports increased by 111½ per cent. during the same period.

The following is the detailed list of the principal articles of import:—

—	Country.	000's omitted.		
		1875.	1885.	1895.
		$	$	$
Biscuits	United Kingdom	12	43	66
	Germany	2	13	116
Candles	United Kingdom	68	10	7
	Germany	—	10	44
Cement	United Kingdom	5	77	124
	Germany	—	7	31

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—	Country.	000's omitted.		
		1875.	1885.	1895.
		$	$	$
Clocks and Watches - -	United Kingdom -	10	7	8
	Germany - -	6	—	14
Cotton goods of all kinds (except Thread and Twist) - -	United Kingdom -	4,810	7,140	6,696
	Germany - -	65	17	35
Apparel, Hosiery, Millinery, Under Clothing, &c. - -	United Kingdom -	151	366	419
	Germany - -	57	86	309
Cotton Thread - - -	United Kingdom -	26	177	404
	Germany - -	—	—	7
Cotton Twist - - -	United Kingdom -	660	881	1,268
	Germany - -	2	1	—
Drugs and Chemicals - -	United Kingdom -	Not	28	109
	Germany - -	stated.	—	9
Earthenware - - -	United Kingdom -	54	69	65
	Germany - -	5	9	46
Glassware - - - -	United Kingdom -	31	84	56
	Germany - -	17	132	129
Hats and Caps - - -	United Kingdom -	15	46	96
	Germany - -	1	2	1
Linen - - - -	United Kingdom -	Not	18	38
	Germany - -	stated.	10	6
Machinery - -	United Kingdom -	26	235	284
	Germany - -	2	2	17
Malt Liquors - - -	United Kingdom -	83	119	187
	Germany - -	11	139	151
Brassware - -	United Kingdom -	43	43	101
	Germany - -	1	2	4
Copper Sheathing - -	United Kingdom -	128	7	20
	Germany - -	—	—	7
Corrugated Iron - -	United Kingdom -	Not	34	106
	Germany - -	stated.	—	2
Hardware, Ironware and Tools -	United Kingdom -	250	331	584
	Germany - -	95	65	267
Iron Nails, Rod, Bar, &c. -	United Kingdom -	76	176	268
	Germany -	7	7	61
Steel - - - -	United Kingdom -	16	7	166
	Germany - -	14	6	3
Tinware - - -	United Kingdom -	Not	31	56
	Germany - -	stated.	11	14
Zinc and Zincware - -	United Kingdom -	8	6	53
	Germany - -	—	1	15
Musical Instruments - -	United Kingdom -	2	3	6
	Germany - -	5	4	12
Oilman's Stores (*See* Provisions) -	United Kingdom -	66	78	222
	Germany - -	6	8	24
Paints and Dyes - -	United Kingdom -	30	126	139
	Germany - -	2	15	44
Paper and Stationery - -	United Kingdom -	54	109	123
	Germany - -	9	9	28

—	Country.	000's omitted.		
		1875.	1885.	1895.
		$	$	$
Provisions (*See* Oilman's Stores) -	United Kingdom -	128	393	110
	Germany - -	24	30	118
Silk Piece Goods - -	United Kingdom -	1	12	20
	Germany - -	1	9	33
Soap - - - -	United Kingdom -	7	21	89
	Germany - -	8	—	—
Umbrellas - - -	United Kingdom -	89	132	9
	Germany - -	38	18	2
Woollens of all sorts - -	United Kingdom -	328	254	313
	Germany - -	59	179	172

It may be contended that the value of the above statements is greatly minimised by the fact that it is a comparatively easy matter to double a small and trifling trade, but it is something different doing so in the case of a large trade, such as that with the United Kingdom. That is, the doubling of a trade of $1,000 gives 100 per cent. increase, yet it is a different thing to double a trade of a million dollars. Admitting the truth of this, it is still an easy matter to show to what extent Germany is going ahead by seeing what proportion of the total trade she contributes in each of the years taken. Thus in 1875 the United Kingdom had 83 per cent. of the total European import trade, and in 1885 she still held 83 per cent., while in 1895 she only contributed 71 per cent. Germany in 1875 contributed over 5½ per cent. of the total European imports, in 1885 also about 5½ per cent., while in 1895 she contributed 9½ per cent.

It may be presumption on my part to indicate what I believe will be found to largely lie at the root of the whole question, viz., the direct control of railways and docks by Government to be worked primarily in the interests of British trade, the making it impossible for British Shipping Syndicates to carry foreign goods at lower rates than British, and the extension of systematic and liberal support to schemes for technical education and the advancement of chemical science. These are questions which, I think, must first be satisfactorily solved before any attempts are made to establish preferential tariffs or to interfere with the freedom of trade.

As showing the immediate importance of the question, it is only necessary to note the total tonnage of Liverpool, Hamburg, Antwerp and Rotterdam, in 1885 and 1895.

—	1885.	1895.
	Tons.	Tons.
Liverpool - - - - -	4,278,881	5,965,959
Hamburg - - - -	3,704,312	6,256,000
Antwerp - - - - -	3,422,172	5,340,247
Rotterdam - - - -	2,120,347	4,038,017

This increase in Continental tonnage is chiefly attributable to the high dock dues and local charges at Liverpool.

A. STUART,
Registrar of Imports and Exports.

Singapore, 2nd September, 1896.

STRAITS SETTLEMENTS.

No. 20 (c).

SIR C. B. H. MITCHELL to MR. CHAMBERLAIN.

(Received October 12, 1896.)

Government House, Singapore,
September 16, 1896.

SIR,

REFERRING to Mr. Swettenham's despatch of the 8th instant, on the subject of the importation into this Colony of foreign produce, I have the honour to transmit, for your information, memoranda on Mr. Stuart's paper by members of the committee who wrote the report enclosed in my despatch of 10th June last.

I have, &c.,
C. B. H. MITCHELL.

Enclosure 1 in No. 20 (c).

If Mr. Stuart had been able to refer to an article in the "Economist" of 1st August, he would have seen that the figures set forth in the articles "made in Germany" are based upon imperfect knowledge and largely overdrawn.

It would appear that the Hanse towns were not included in the Zollverein until 1889, and until then German goods intended for export were not returned as for the countries of destination, but to the ports of shipment (the Hanse towns) only. As a proof of this the exports to the Hanse towns for 1888 amounted to 39,547,000*l.*, and in 1894 they had fallen to 1,872,000*l.*

It is probably not disputed that the foreign trade of Great Britain has received a check, but so also has that to some extent of other countries.

EXPORTS FROM GREAT BRITAIN.		EXPORTS FROM GERMANY.	
1889.	1894.	1889.	1894.
£ 248,935,000	£ 215,824,000	£ 158,335,000	£ 148,130,000

The "Economist" adds that exports in Great Britain averaged in 1886 5*l.* 17*s.* per head, in 1894 5*l.* 11*s.*, against, in Germany, 3*l.* 4*s.* and 2*l.* 18*s.* respectively, "and "taking the statistics as a whole" (some tell more against Great Britain than the "above), "whilst German competition is a formidable factor, they do not justify the "dolorous dirges of departed greatness in which it is too much the fashion to "indulge."

Turning next to Mr. Stuart's figures, it was admitted in our previous memorandum, and the reasons given, that in such *outré* articles as biscuits, candles, glassware, hardware, miscellaneous, and inferior hosiery, German goods had forged ahead of British manufactures; but the returns do not show any falling off as against Germany of cotton yarns, linen, and the leading metals, nor is the competition in cotton goods of appreciable amount. English brewers are apparently content to divide the wish-wash manufacture with German competitors.

With respect to direct control of railways and docks by Government, advocated by Mr. Stuart, I have no faith in resort to such devices, and believe that the freer the action the less likely are the several interests concerned to clash. I take leave to question whether the increase in tonnage to continental ports is not rather due to natural extension of direct shipments to the Continent, which after opening of the Suez Canal first became practicable, than to excess charges in London and Liverpool, although these, doubtless, may have stimulated the divergence.

As an instance of the manner in which British shipowners are handicapping trade, it may be pointed out that, whereas under conference agreement Foochows teas pay a freight of 36*s.* per ton of 40 cubic feet, the same steamers, calling at Colombo to fill up, carry Ceylon teas at 10*s.* per ton.

T. SHELFORD.

12th September 1896.

Enclosure 2 in No. 20 (c).

As Mr. Selford points out, the figures set forth in the articles "made in Germany" have been shown by the "Economist" to be based upon imperfect knowledge and largely overdrawn. Mr. Stuart, in our opinion, further errs in that, in addition to accepting the "made in Germany" figures as "conclusive evidence," he adds in support of them figures from the local returns of imports which are incorrect and misleading. For instance, imports of steel from the United Kingdom are stated by him as 166, against 6 from Germany, whereas practically no steel comes from the United Kingdom, all the imports being of continental origin. In the same way zinc and zinc-ware and several other articles, which, being shipped viâ London, appear in the local statistics as from the United Kingdom, are of continental origin. *Vice versâ*, many articles appearing in the local returns as of continental origin, really come from the United Kingdom. Under the heading "cotton twist" we note Mr. Stuart's figures give no imports from Germany in 1895. We question this. The figures therefore on which Mr. Stuart bases his views must not be implicitly relied on. We may here mention that milk and other sundries, always of continental origin, which used to appear as shipped from London, are now, owing to increased facilities at continental ports, shipped direct, and now appear under their proper heading, thus upsetting the comparison of the figures of former years with those of the present time. We would also point out that a large proportion of the goods shipped from German ports, though of continental, are not of German origin.

While admitting that, in what may be called the minor articles, the Continent holds most of the trade, we take leave to doubt the Registrar's statement that she is rapidly increasing her exports; and in the more important articles we are of opinion that Great Britain is at least holding her own, if not improving her position.

As regards the direct control of railways and docks by Government, there is no doubt that the policy followed by the railway companies in the United Kingdom, the existence of freight conferences, and the excessive dock charges, both in London and Liverpool, affect prejudicially British trade; but we doubt the soundness of the cure proposed by Mr. Stuart. That the direct trade to the Continent received a great stimulus owing to the high dock and port charges in London, admits of no doubt; especially is this the case in the export trade of Singapore, which formerly was chiefly worked through London, but now goes direct. As a consequence there is a large increase in the number of steamers calling at continental ports, but we do not think that this has to any extent affected detrimentally the import into Singapore of British manufactures.

F. W. BARKER.
A. J. ROSS (Guthrie & Co.).
St. V. B. DOWN (Borneo Company, Limited).

14th September 1896.

No. 20 (d).

SIR C. B. H. MITCHELL to MR. CHAMBERLAIN.

(Received October 30, 1896.)

Government House, Singapore,
October 6, 1896.

SIR,

IN continuation of my despatch of the 8th ultimo, on the subject of foreign competition with manufactures of Great Britain intended for export, I have the

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honour to give cover to a memorandum by the Registrar of Imports and Exports on Belgian competition with Great Britian in this Colony.

2. The enclosure demonstrates that of late years Belgian exports for this Colony have slightly fallen off on the whole, in spite of a considerable increase under the heads of crockery, glassware, and paints.

I have, &c.,

C. B. H. MITCHELL.

Enclosure in No. 20 (D).

MEMORANDUM by the REGISTRAR of IMPORTS and EXPORTS on BELGIAN COMPETITION with GREAT BRITAIN in TRADE in this COLONY.

It was not till 1883 that Belgium had direct dealings with Singapore. In 1888 imports from thence reached 800,000 dols. and then fell gradually till 1894, when they valued 784,000 dols.—much the same as in 1895. Her export trade suffers, like that of Britain, though to a smaller extent, from German competition, and it is in certain articles only, such as arms, crockery, candles, glassware, wire-nails, paints, and zinc sheeting that she offers any serious competition to the United Kingdom. I submit a list of the principal articles sent to Singapore in which Belgium successfully competes with Britain for the quinquennial periods ended 1890 and 1895:—

IMPORT (the Unit taken is 1,000 dollars).

—	Country.	000's omitted.	
		1886–1890.	1891–1895.
		$	$
Apparel	United Kingdom	1,975	2,266
	Belgium	262	117
Arms	United Kingdom	72	56
	Belgium	195	137
Candles	United Kingdom	43	32
	Belgium	234	156
Crockery	United Kingdom	400	457
	Belgium	234	420
Glassware	United Kingdom	323	272
	Belgium	300	354
Hardware, Ironware, and Steel	United Kingdom	2,170	3,177
	Belgium	455	448
Sarongs	United Kingdom	537	490
	Belgium	192	121
Paints	United Kingdom	439	544
	Belgium	96	188
Zinc Sheeting	United Kingdom	92	152
	Belgium	80	125
†Nails	United Kingdom	536	81
	Belgium	165	179
Gin	United Kingdom	255	151
	Belgium	184	148

† The first period contains nail and rod iron, but the second period nails only.

A list of European countries, with their total exports to Singapore will show the position of Belgium in its relation to other countries as a competitor in the Singapore market. These are given on the same five yearly bases, and are therefore not subject to the fallacious inferences which are so often drawn—(1) when comparing any two years' trade, in one of which there may be an exceptional disturbing influence; and (2) when attempting to prove anything by the export value per head of the populations of two countries, such as Britain and Germany, the one with a population of 38 millions and the other with 51 millions, so that the annual increase is not the same.

—	000's omitted.		Approximate percentage of	
	1886-1890.	1891-1895.	Increase.	Decrease.
	$	$		
United Kingdom	74,794	69,589	—	7
Germany	6,201	8,300	34	—
France	4,892	5,023	2¾	—
Belgium	3,436	3,316	—	3¼
Austria	2,302	1,872	—	21⅓
Italy	932	1,369	47	—
Holland	850	2,220	161	—
Spain	124	136	9¾	—
Total	93,621	91,831	—	—

France and Italy are credited with the productions of Switzerland, including yarn and turkey-red cottons, the latter country especially having of recent years shipped largely of Swiss goods from Genoa. As regards Holland, the increase between the two periods of sarongs, yarn, and gin alone accounts for over a million dollars of the total increase. It would thus appear as if the import of European goods had fallen off, but on the other hand Japan imports have risen from 2⅓ millions in the first quinquennial period to nearly 11 millions in the second, coal imports alone having increased in value from less than 1½ millions to 4¾ millions, and these results are arrived at without taking into consideration the large amount of Japan goods bought in Hong Kong for Singapore, so that even the progress of Germany shrinks into comparative insignificance when placed beside that of Japan.

The largely increased tonnage entering and clearing at Antwerp, while it is no doubt partly due to increased trade, may be largely caused owing to the cheapness of port dues, with the proximity of Dutch and German ports, so that vessels may be tempted to call *en route* even for small shipments. Just as vessels frequently clear from Glasgow calling at Liverpool to fill up, so it may be that ships from Hamburg, Amsterdam, and Rotterdam call at Antwerp. I have, however, no authority for such a supposition.

A. STUART,
Registrar of Imports and Exports.

Singapore, 30th September 1896.

HONG KONG.

No. 21.

Sir WILLIAM ROBINSON to Mr. CHAMBERLAIN.

(Received August 18, 1896.)

Government House, Hong Kong,
July 15, 1896.

[Extract,]

With reference to your despatch of 28th November 1895, I have the honour to forward the enclosed report of a Committee which I appointed to inquire into the extent to which foreign imports have displaced, or are displacing, similar British goods in this Colony, and the causes of such displacement, as well as the question of the transit trade of Hong Kong, as affecting British or foreign products.

In spite of the difficulties which such an inquiry necessarily presented, owing to Hong Kong being a free port, the Committee has succeeded in collecting and arranging a mass of useful and suggestive information, from which it appears that a steady, though not strikingly large, displacement of British goods has been taking place for some years, but that not many great staples have been seriously affected. The competition of Japan, however, threatens to assume serious proportions in the not far distant future.

The causes to which the waning popularity of certain British goods is attributed are enumerated in Paragraph 9 of the report, and I would invite your special attention to the remarks of the Committee contained in that and the succeeding paragraph regarding the action of the shipping conference.

Enclosure in No. 21.

Report.

1. The Committee, appointed by his Excellency the Governor, in response to an inquiry from the Secretary of State asking whether there had been any, and what, displacement of British goods in this market, held their first sitting on the 29th February, and have since met 13 times and taken the evidence of 14 witnesses, which evidence has been supplemented by information gathered by the Secretary. A careful consideration of the whole has enabled the Committee to arrive at the conclusions given hereunder.

2. At the outset the Committee were confronted with the difficulty that, Hong Kong being a free port, precise returns of trade cannot be made up in this Colony, owing to the absence of any statistics of imports and exports (with the single exception of opium). The Committee have therefore limited their investigations to ascertaining where there has been displacement of British goods in this market by foreign manufactures, to what extent this displacement has been effected, and to what causes it has been due.

3. It is apparent from the evidence that the displacement of British goods has been going on steadily for some years, but it has not been on a strikingly large scale, nor have many great staples been very seriously affected. There are instances, however, in which the British manufacture has been entirely ousted by foreign goods, as in the cases of llama braids and aniline dyes, while others, such as Spanish stripes and broad cloths, have been in great measure replaced by similar goods imported from Germany.

4. In other cases, again, there have been attempts to cut into British trade in smaller wares, sometimes by foreign imitations, with, however, often only a qualified or temporary success. These articles were represented by hosiery, lamps, paper, umbrellas, rubber shoes, soaps, biscuits, beer, locks, files, needles, cutlery, &c., in which Germany and Japan are the principal competitors with England.

5. There has been a serious falling off in the imports of metals from Great Britain, notably in that of yellow metal, which formerly was exclusively imported from thence. It is estimated that only about half the import of this metal now comes from British makers, the inferior German metal being greatly aided by the lower rate of freight payable from German ports. The same remarks apply to the trade in bar iron, nail, rod, and scrap iron, most of which is now imported from Belgium, the productions of which country are helped by cheaper cost of production and lower freights from Antwerp. Pig lead, which formerly was imported from England and Germany, now comes almost exclusively from Australia on account of lower cost of production.

The Committee are conscious it may be objected to the foregoing paragraph that a portion of the evidence does not bear out the statement that dead weight cargo shipped direct from Great Britain arrives here at a disadvantage in freight compared with that

shipped from continental ports. The Committee were constrained, nevertheless, to accept the balance of evidence, which unmistakeably points to the conclusion arrived at; and, to more clearly elucidate the point, some tabulated examples of actual shipments have been obtained.

6. The trade in arms and ammunition and gunpowder is monopolised by continental manufacturers, owing to the much cheaper prices at which they can lay them down on this market.

7. Certain branches of trade, such as those in wire nails and window glass, have always been in Belgian hands, the prices charged being apparently beyond the competition of all other producers. Not so, however, the trade in candles, which has been completely wrested from England by Belgian makers, this being to a great extent due to superior packing.

8. The competition of Japan is only just commencing, but it promises to prove serious later on. Already the Japanese have secured almost a monopoly of the trade in cotton waste, washing soda, and sulphuric acid; they are competing in cotton goods, paper, ships' lamps, and cheap substitutes for cretonnes, blankets, towels, soaps, &c. Among other items, they are exporting really well-made cotton half hose, 50 per cent. below the cost of similar goods from Germany; and their cement, though inferior in quality, is cheaper than any European cement than can be imported, competing even with the local product, which has the advantage of paying no freight or marine insurance.

9. The causes to which the displacement of British goods in this market are to be assigned may be briefly stated:—

1. Lower cost of production of rival foreign goods.
2. Disinclination of British manufacturers to study taste of consumer.
3. The steadily falling value of silver since 1873.
4. Lower freights outwards from foreign as compared with British ports.
5. Cheaper railway transit to foreign ports of shipment.

The last two named causes apply more especially to metals and heavy goods, and No. 4, the Committee regret to say, is due to the action of the Shipping Conference (consisting chiefly of British steamship owners) which, while maintaining freights from British ports, carry cargo at a much lower rate from continental and American ports, thus giving foreign manufactures a virtual subsidy in their competition with British products.

In this connection the Committee wish to make special reference to the advantages conferred on American cotton piece goods in the China market by the rates of freight charged by the Conference steamers from New York to Hong Kong and Shanghai, which average from 25*s.* to 30*s.* per ton, as compared with 57*s.* 6*d.* from London and Liverpool outwards. The same remarks apply to the shipment of machinery from the United States to China, the freight for which is about 40 per cent. lower than that from British ports.

In considering this phase of the subject the question seems to arise how far the Imperial Government would be justified in requiring of the Conference a modification of their tariff before continuing a subsidy or other support to any shipping company which is a party to a compact that places British manufacturers at a disadvantage with foreign rivals.

10. The Committee, moreover, feel bound to record their conviction that several of the witnesses were indisposed to speak freely on this subject of the Shipping Conference; and they are of opinion that it is a question of such paramount importance to British trade that it might fittingly form the subject of a searching investigation on the part of the Home Government.

11. The Committee are satisfied that, apart from this preference to foreign cargo, shown by Conference steamers, the competition encountered by British goods is for the most part a fair business competition. There are occasional infringements of British trade marks and more frequent imitations of British goods by continental makers, but in the majority of cases the imitation is sold as such on its merits, and in some instances the foreign producers strike out new lines for themselves, and from small beginnings evolve a considerable trade. While the British merchant or agent in Hong Kong appears to be well on the alert, and to very efficiently represent the home manufacturer, the latter seems too often reluctant to alter his styles and methods, does not care to make a present sacrifice for future profit, and is apt to neglect small openings for a new trade. This is in marked contrast to the untiring efforts of foreign makers to study the market and adapt their goods to the requirements of the consumer.

HONG KONG.

12. Turning to a consideration of the transit trade of the Colony, which the Committee take to mean the transhipment of goods here for the neighbouring countries, Japan, Siam, Indo-China, the Philippines, Netherlands Indies, &c., this trade exhibits a tendency to increase on the whole, with the present exception of that with Indo-China, which has latterly shown a decline. This decline is due to the high preferential duties recently imposed by our French neighbours, the effects of which are visible in the falling off in the export of yarns and British manufactured goods to Saigon and Tonkin.

13. When the provisions of the new treaty with Japan come into force a most serious decline is expected to ensue in the export hence of refined sugar to that country under the revised tariff, and it is feared that this, the chief industry of the Colony, which has already been very adversely affected, may perhaps be permanently injured. Had the Hong Kong Government been consulted before the alteration of the tariff was decided upon, it is probable some adjustment of the duties less unfavourable to this Colony might have been arrived at, and this important industry saved the check it must presently meet.

14. Whilst the words "The Transit Trade of Hong Kong" are perhaps not intended to directly include the conduct of trade with the *interior* of China, yet the Committee feel it within the scope of their inquiry to point out here that this transit trade would be largely benefited and increased, were the transit pass system allowed by the native authorities in South China to work in accordance with the treaty requirements. Unfortunately, ever since the signature of the Treaty of Tientsin, Article XXVIII. of which confers this transit pass privilege on British subjects, the officials in South China have steadfastly and persistently sought to render it a dead letter, and so far their success has been most complete. If the transit pass system be enforced, and the inland waterways of the Two Kwang provinces be opened to foreign trade and steamer navigation, as the result of negotiations now proceeding, there is every reason to believe that a marked increase in British trade will soon be apparent.

15. Another subject not perhaps strictly within the scope of the present inquiry, but which has come before the Committee incidentally, and is closely associated with the British shipping trade, is that of the impediments placed in the way of British ships obtaining their fair share of the Chinese passenger traffic at certain of the neighbouring outports. This is due to their having to conform strictly to the regulations of the Chinese Passengers' Act, 1855, whereas foreign steamers are subject to no such regulations, and can, in consequence, carry double or treble the number of passengers permitted under the Act to a British vessel. Much lucrative trade is thus completely closed to British ships. The Committee therefore deprecate further legislation in the direction of making these passenger regulations more stringent, as the effect can only be to still more heavily handicap British tonnage on the China Coast and lead to its supersession by continental steamers.

J. H. STEWART LOCKHART,
Chairman.
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N. J. EDE.
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Hong Kong, 22nd June, 1896.

Appendix to No. 21.

MEMORANDUM based on the EVIDENCE on which the COMMITTEE reported.

1. ALKALI.—German goods are preferred to British goods, because they are frequently lower in price, and packed much better. The foreign article is equally suitable and equally adapted to the importer's taste and requirements, as the goods it has displaced. It is impossible to tell the exact proportion by which the foreign has superseded the British article. There are no statistics here, but the people at home can find that out best from their own and continental statistics. There is still a large proportion brought from England. The foreign alkali is rather better packed than the British. Price for price the importer is in favour of the German article.

4. ARMS AND AMMUNITIONS:

(*a*) *Fire-arms.*—The Belgians monopolise the whole of this trade, which consists mainly of inferior revolvers of 7, 9, and 12 millimetre. Many years ago some old Government rifles came from England, but that trade has entirely ceased.

(*b*) *Gunpowder.*—Gunpowder comes almost entirely from Germany; English gunpowder is much too dear for the Chinese. The English gunpowder is supplied to

some extent for the manufacture of cartridges, the best known brands being Pigou, Wilkes and Curtis, and Harvey. The German keg of 25 lbs. costs $2.50, or thereabout, whereas the English is double the price.

6. BEER AND ALE.—Three-quarters of the trade here is in Continental beer. It is light and of excellent quality, and is of a different class altogether from the English beers. It is very cheap; it varies in price, but the great bulk of it may be put down as saleable here at from $7 to $9 a case of four dozen quarts or six dozen pints. The English brewers do not make a beer suitable to the taste of the generality of people out here. The foreign beer is equally suitable and equally adapted to the importer's taste and requirements as the goods it has displaced. In the case of beers the Germans would not seek to imitate British trade marks. They are very particular about their own trade marks. One of the things which make the British article dearer, and therefore having a smaller sale, is the continued high rate of freight from England, as compared with the rate of freight from the Continent.

7. BISCUIT AND BREAD.—Bread is not imported, but continental biscuits are imported in considerable quantities on account of the cheapness and packing in fancy tins. The biscuits are frequently bought for the sake of acquiring the tin. The tins are nominally ½-lb. tins, and are fancily decorated. The cost at the present moment laid down in Hong Kong is $2.20 per dozen tins. That is for foreign biscuits. These tins are bought up for the purpose of using as brush and comb boxes by the Chinese. There is no comparison between the quality and finish of the German and British biscuits. The foreign biscuit is very inferior. It suits the taste of the consumer to take the foreign biscuit because he gets for $2.20 per dozen these handsomely decorated tins with beautiful pictures, in permanent colours, for less than 20 cents per tin. He does not care about the taste or quality of the biscuit, but practically buys the tin. It cannot be said that the foreign biscuit has wholly displaced the British article. The foreign manufacturers have created their own trade, and these biscuits are made to meet a special demand. The English decorated tin is a very costly affair altogether, and is not able to compete with the German article. The English biscuits cost double the price of the German. The German manufacturer makes a common biscuit; it is not baked well, it is made of cheap flour; but he packs it in fancy tins which suit the Chinaman's taste. No attempt is made to imitate British trade marks. Biscuits are an article upon which freight comes very hard from England—42*s.* 6*d.* per ton measurement—and they are very bulky, while the German article comes for 35*s.* per ton.

10. BUTTER.—It is only recently that Australian and Canadian butter has been placed upon the market here. It has a very small sale at present. Almost the entire import is Continental. The reasons why Continental butter is most in demand are cheapness and good keeping qualities. Excellent butter is made in Ireland, and it is packed very well, but for some reason or other it does not keep out here, and the small quantity imported is used chiefly by bakers. On the Continent every manufacturer of butter makes it on a very large scale, whereas in England and Ireland each dairyman manufactures his own butter, and it is not done under a proper scientific system. When it arrives here the British butter is sound and good, but after being here some little time it turns bad, whereas the Continental butter keeps for a very long time. The price of British butter compares very favourably with the Continental butter.

The market formerly was held by Americans, when the American sailing ships brought Sill's Goshen butter in kegs. Then tinned butter came in, and now the market for butter is mostly supplied by Continental manufacturers. The article is mostly margarine; it is not pure butter.

11. CANDLES.—On the score of cheapness Continental candles are sold almost entirely here. The prices vary considerably—from 20 to 40 per cent. The price at the present time for 8½-ounce candles is $2.50 per box containing 25 packages, each package containing six candles. That is the selling price. The laying-down price would be about $2.35 for foreign candles. There are British articles of the same kind to compare with this. It is almost entirely a Belgian trade, although some come from France and Germany. The German candle is much cheaper. The Germans give 15 ounces instead of 16 ounces. Some Chinese dealers order thousands of boxes of candles at a time, and they ask for 15 ounces because they are a fraction cheaper. The trade in candles is prodigious. It is a season trade. For example, when the Chinese students are being examined at Canton there is a large demand for cheap German candles, which are used in the examination halls for the three days the students have to remain there. The cheapest British candle to compare with these would cost 10 cents per box more, and the makers absolutely decline to alter their

system of packing to that adopted by the Continental makers. The better class of English candles still hold their own.

12. Caoutchouc, manufactures of.—The trade in india-rubber shoes was entirely British a few years ago, but now it is about half German and half British. The British manufactures hold their own only on account of the trade mark or "chop." They established a reputation for a certain mark in the beginning, and they are now bought chiefly on account of that mark. The Continental-made shoes are about 10 to 12 cents a pair cheaper than the British. They are almost as good and durable and quite as suitable for the market. Were it not for the trade mark the British goods would be knocked out altogether. The cost of Continental shoes laid down here at the present time is about 70 cents a pair and British about 80 cents per pair. The British rubber shoes are manufactured chiefly by the North British Rubber Company of Edinburgh. The American shoes are too dear. There is a small trade.

14. Cement.—At one time the trade in cements was all English. Latterly, with the exception of that imported for the Government's use, three-quarters of the trade is German, principally and chiefly owing to its being lower in cost, being ground finer than the British, and consequently better suited for use, a smaller quantity being necessary on account of finer grinding, compared with the work to be done, than the British cement. That is to say, it is more economical than the British article of ordinary make. At the present moment the Germans have so flooded the markets with their cements that it is difficult to sell even German cement, and this is due to the German Mail making a reduction to all shippers from Hamburg of 2*s.* 6*d.* per ton if the cement is of *bonâ fide* German manufacture. But the local manufacture is likely to knock out all foreign importation. The Green Island Cement Company is getting a good grip of the market. There is no imitation of trade marks in this case; the Chinaman asks for German trade marks. The term "Portland cement" is a generic name. Some cement comes from Belgium and some from France. The cement that comes from these countries compares favourably with the British for ordinary rough purposes.

Japanese cements come in here now in large quantities. Japanese importers and the Green Island Cement Company save a good deal in freight, and with all these bulky articles the freight has a very important bearing upon the question.

16. Chemical Products and Dye Stuffs.—The Germans have now got the aniline dye trade to themselves. The British manufacturers have lost their trade, at all events with the East. It is in consequence of the Germans being well ahead in chemistry that their manufacturers have secured the trade. One of the principal reasons why they can manufacture aniline dyes cheaper is the cheapness and facility with which alcohol can be produced for chemical purposes in Germany. The English at one time controlled the market with water blue, which was famous in Hong Kong, and was used by the Chinese, but that has entirely disappeared from the market. Fifteen years ago the English water blues always brought higher prices than the substitutes sent out from Germany.

18. Clocks and Watches.—Quantities of German clocks are imported here. Watches come chiefly from France and Switzerland. There may have been a few English clocks in the olden times, but not now. Hong Kong has now a clock factory. It is situated at Wanchai, and is a branch establishment of a German manufactory.

19. Coal.—This is passing into the hands of the Japanese. Very little Cardiff coal is sold out here now.

The Australian coal trade is at a very low ebb; that was spoilt by the strikes in Newcastle (N.S.W.) about five or six years ago. Up till then there was always a tolerable trade, the coal being used by the Chinese in Canton, and elsewhere, for smelting purposes. They believed it was the only coal that suited their purpose, but, during the strikes in Australia, the Chinese were driven to use Japanese coal; and now they have found it is good enough for their purpose they will not take anything else. Besides, the Japanese coal is very much cheaper.

23. Cotton Manufactures:—

(*a*) *Piece-goods.*—As regards printed goods, there are a good many French kinds imported. French goods are of a better class. In low-priced articles the French cannot touch the Manchester goods; in higher-priced goods the French goods certainly do affect the Manchester trade. The French designs are superior to the Manchester, and they make up a finer quality, occasionally, than the Manchester goods. They are more expensive.

Piece-goods Dyed.—With the English manufacturers there is always a great deal of trouble as to shades of colours. It is a very important matter, and the English manufacturers always maintain that their shade is better than the samples sent home

to them. They will not see that the shade of colour that is more beautiful to the European eye may be quite different to the Asiatic, therefore they will often return goods stating that they consider their particular manufacture better dyed and of a better shade than the samples, instead of trying to make what the natives want. It is, of course, a very irritating thing to manufacturers at home, because the taste in colours is continually changing, but if the English manufacturers are not willing to follow the requirements of the market they must allow themselves to be cut out by the continental makers.

(*b*) *Stockings and Socks.*—(*c*) *Hosiery and small wares.*—More than nine-tenths of the whole of the socks imported into the Colony are of German make. There is no British article of the same sort brought out here. It is one of those trades the British manufacturer does not dream of entering. There are hundreds of qualities, and it comes down to this that quality for quality there is no use asking British manufacturers to quote prices.

English goods are being packed the same as the German, in boxes. Formerly, the English way of packing was in paper, one dozen to the paper. German goods generally come out in half or one dozen paper boxes, and the English goods are now coming out in the same way. The Chinese demand a special article, and the English manufacturers in Nottingham have their business for Europeans principally. The Chinese demand a slightly different article, and the Germans adapt themselves to it, and have the whole trade in their hands.

[Between 25 and 26.] FLOUR.—There has been lately more of the Canadian article coming in, and there is no reason why Canadian flour should not entirely replace the Californian article. It can produce better flour from a baker's point of view.

27. GLASS.—There is an enormous trade in window glass. That is the most important section of the trade, and the Belgians have it entirely.

Even if the British had the same freights they could not put down window glass here of the same quality as comes from Belgium. It is fourth-quality glass. Nobody makes this quality; it is the result of imperfect manufacture, what we call "Wasters." The exporters find it cheaper to pack it up and send it out to China, than to melt it up again. It would not pay any manufacturer to make it. That is why the Hong Kong manufactory failed. They knew there was an enormous trade in glass and they sought to meet it, but they had to compete with this "Waster" glass, and found it impossible to sell their first and second quality.

Glassware, particularly tumblers, used to come largely from England. The English article was about the same price as the continental, but the difference in freight favours the continental article.

Ship lamps are also ousting British goods on the Hong Kong market, both side-lights and mast-head lights. These are things which every ship must be found with, and it seems a great many ships in this part of the world are now supplied with lamps made in Japan instead of with lamps imported from England, as formerly. It would not be out of place in this connection to raise the question whether many of the collisions at sea amongst Japanese ships are not brought about by the inferiority of the coloured lenses used in these lamps.

29. HABERDASHERY AND MILLINERY.—Under this heading would come llama braids, which are used for decorating Chinese ladies' dresses. It is a plain braid. The bulk of it, almost without exception, comes from the continent, principally Germany. It is rather lower in quality than is used by foreign countries, and the British manufacturers were in the habit of making good qualities of braid for the continental and American markets, and they did not care to go into this Chinese trade. The German manufacturers put up special machinery for the Indian and Eastern markets, and the consequence is that the trade has gone to them and remains with them, and it is not thought that any British manufacturer could compete against them. It is a very large trade.

There are a great many German needles imported here, and sold at from $3 to $6 per tin of ten thousand, whereas Kirby's needles are sold at $28 for the same quantity. From 1881 the German article began to appear. The German article was made up exactly like the English. It was packed like the English and had a label, a colourable imitation. They are called "Ne Plus Ultra" needles. Ever since 1881 there must have been a progressive importation of German needles. Now it is a very large trade.

Kirby's needles are the most popular and the most largely used. The Chinese have tried the German needles, and have found out that they have not the strength of Kirby's needles, and they find that in the long run the English needle is the better article.

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32. Implements and Tools of Labour.—The trade in spades is three-quarters American and one-quarter British. The American spade is better and cheaper, and the English cannot compete with it.

40. Metals:—

(*a.*) *Iron:*

(*a.*) *Old, for remanufacture.*—There is a very large trade in old iron which comes mostly from Germany. Some of it, old horse shoes, comes from Sweden. Thousands of tons of old horse shoes are shipped to Hong Kong in one consignment. The English horse shoes are not sorted properly. There are certain firms in Hamburg which collect these old horse shoes all over the country, then sort them and ship them out in bulk. When a Chinaman now gives an order it is always set out in the beginning of the contract that they are to be Hamburg horse shoes.

It is the best kind of iron. It is very fine, in fact, it is beautiful iron, because it has been hammered over and over again. The Chinese make all sorts of instruments from it, including sickles for cutting grass and sugar-cane. They also manufacture knives. It is difficult to give the exact figure of the total trade, but it cannot be less than $125,000 a year in Hong Kong.

(*c*) *Bar, Angle, Bolt and Rod.*—In 1893 the British export to this part of the world of bar, angle, bolt and rod iron was 5,153 tons. In bar iron, nearly the whole import is Belgian. The chief and only reason for this is the price laid down here, and the chief reason why the price of British exceeds that of the Belgian is the higher freight. Goods have come from Belgium at 12*s.* 6*d.* freight per ton, while at the same time the lowest freight obtainable from any British port to this in bar iron was 18*s.* per ton. As a rule, the freights of iron from Continental ports are from 2*s.* 6*d.* to 5*s.* per ton lower than from British ports.

Until about eight years ago rolled rod iron came entirely from England, and was principally of Staffordshire make. About that time Continental makers adopted the Thomas and Gilchrist process of making basic steel, and were able to turn out basic steel at prices lower than the equivalent quality in English iron. The consequence is that one-half of the rod trade has become German or French. In iron, it is the simple question almost of price alone. We actually pay more for basic steel rods than the equivalent quality of iron of English make, but we know of no English maker in England who makes basic steel rods at all.

(*e.*) *Wire.*—About 25 years ago the wire trade was nearly all of English origin. About 20 years ago it began to shift to the Continent, and now it is almost entirely of German production. The wire they send out here is of excellent quality, fully equal to the best English in finish, of slightly finer gauge than the equivalent size in English. Gauges differ. The Continental gauge of any particular size runs an infinitesimal fraction smaller than the English gauge, and that pleases the Chinaman.

(*i.*) *Steel, unwrought.*—Bamboo steel is almost all Continental, German. The Scottish manufacturers a few years ago introduced their make, but have been hampered in a great measure by the higher freights charged, otherwise there is no reason whatever why Scottish manufacturers should not successfully compete.

(*k*) *Manufactures of steel, &c.*

Adzes.—There is an enormous trade in these in China, but the English manufacturers will not adapt themselves to the American pattern, which holds the market. There is no patent about it. It is merely a matter of shape.

Door Locks.—The business cannot be less than $100,000 a year. The British have a very small share of the trade, and the same remark applies to door locks. The smallness of the trade done by the British manufacturers is not due to the inferiority of the article. It is merely a question of pattern and weight of article.

Plane Irons.—Hundreds of thousands of plane irons come out here for carpenters' use, and the English article is finding a keen competition with the French. The French produce a lighter make, which suits the Chinese labourer better.

(*b*) *Copper:*

(*b*) *Wrought or partly wrought.—Mixed or yellow metal.*—Until 10 years ago the whole import was of British make without exception. The import now of Continental make runs from one-third to one-half of the total import. Yellow metal is used, and has been used for nearly 20 years past, chiefly for braziery purposes, and is sold in sheets of certain thicknesses. They are denominated weight in ounces per square foot, the ordinary assortments being from 10 up to 32 ozs., all of which is beaten by hand with hammers into brass utensils. On the sizes 10, 12, and 14 ozs. the English manufacturers used to charge heavy extras on account of the difficulty of rolling such

thin sheets. The Continental makers saw their chance, put down special rolling mills to roll these thin sizes particularly, and were able to roll them at a price below the English manufacturer's. They have gradually got all the trade in those sizes. The continental article up to as high as 20 ozs. can always be had below the price of any fairly good English make, and according to some opinions is better in quality than the cheapest English make. The Continental makers will adapt themselves to any new size required, while it is almost impossible to get an English maker to do so. The dock and shipping people know the difference between British and foreign metal, and are willing to pay the trifling difference of cost, but the bulk of it is used in Canton, and there is a large demand for the cheaper article which comes from Germany. Others state that English manufacturers have suffered from the competition with the German article chiefly because of the difference in freight; 2½ per cent. is quite enough to turn the scale in favour of the German article.

There is no copper trade here worth speaking about, it is all yellow metal. Yellow metal is probably one of the most valuable articles that come to China.

The yellow metal runs from 10 to 32 ozs. weight per sheet, and the English makers want an extra farthing per lb. below 16 ozs., and ¾*d.* for 10 ozs. From 16 to 32 there is a basis price. The Germans throw in the 14 ozs. into the basis, a farthing per lb. just now is equal to a cent—that means $1.33 a picul cheaper for 14 oz. That is an enormous profit. The Germans give more sheets to the weight. Metal cannot be got out of England at less than 25*s.* per ton, whereas the German freight is 17*s.* 6*d.* per ton net, or 17*s.* 6*d.* for a thousand kilos, which is a ton. The German, who is actually charged ⅛*d.* per lb. more for his metal, can put it down cheaper than the British merchant. That is a question of freight absolutely. The only reason why the Germans have not the monopoly is that that their works are not large enough to overtake the volume of trade. If their works were large enough they would supply the whole of India, which is an immense field for yellow metal, beside Hong Kong, Shanghai, and Japan. They cannot keep pace with the demand, and that is how the English manufacturers still manage to get orders.

"The steamship owners' conference" handicap the British article very much, as out of London or Liverpool dead-weight freight will possibly be 22*s.* 6*d.* and 10 per cent. per ton, whereas the same owners will send their steamers to Antwerp, &c., and take the very same goods at 17*s.* 6*d.* per ton net.

(*d*) *Lead—pig, sheet, and pipe.*—Pig lead is nearly all Australian. Sheet and pipe lead is all British. The Australian pig lead is fully as good as the English. Zinc is almost entirely continental, and there is no tin here except that which comes from the Straits Settlements.

54. Silk Manufactures.—The imported article is very small in Hong Kong. The chief business in silk is done in exporting. The Chinese use a certain quantity of French silks.

There is a large business done for umbrella covering, but it is mixed, half silk, half cotton, and the covers are manufactured chiefly in Japan. The Japan manufacture will cut out the French in that particular instance.

67. Woollen and Worsted Manufactures:

(*a*) *Woollen Cloths.*—In woollen cloths the Germans have knocked the British goods out entirely. The Germans have become adepts in working in cotton with wool. Some samples have been sent home of what is sold here as broad cloths, sold as all wool, and the Yorkshire firms have discovered that they contained a large proportion of cotton, and they have replied that they could not make these cloths at the price.

(*b*) *Tweeds and Fancies.*—Half of this is British and half continental. The British used to have it all, but they have been ousted by the continental tweeds, which are more suitable for the climate. Twenty-five years ago flannel goods were worn, but now a tweed which is all continental has taken their place.

(*c*) *Flannels.*—The British have three-quarters of the flannel trade still, but a good deal of the crape flannel comes from Germany and Japan.

The German flannels affected the trade for a considerable time, but English manufactured goods were superior and much more in favour than the German, both here and in Japan. The Japanese use low-priced flannels. The Japanese cotton crepe, to a certain extent, has taken the place of flannels for underwear, and they make it up for themselves.

(*d*) *Blankets.*—The British still have the trade for woollen blankets, but the Germans have a good trade for cotton blankets which have never been taken up by the British manufacturers. It is a medium trade, whereas the woollen blanket trade is very large, although not so large as it used to be, on account of exchange.

(*e*) *Worsted Stuffs, &c., mixed.*—The German goods were originally put on the market at a very much lower price than the English manufactured goods, and the consequence was that they got a great deal of business at first. Latterly, the weights they have been giving for this broadcloth are not so good as formerly, whereas the British manufacturer has kept his weights and the same goods, and now the business is coming back to him. The same remark applies to meltons. The Germans borrow the terms "unions" and "meltons" from the British.

The Germans have a particular cloth in which they have almost a monopoly. It is the Spanish stripes, in which several foreign houses have their own "chops." The particular finish the Germans have got cannot be obtained in Great Britain, just as the Germans do not seem to be able to get the finish we have in unions and meltons. Llama braids is absolutely a German trade, but it was not always German. Many years ago it was only imported in very small quantities from England. It was first introduced by the British, but now it is solely taken from Germany.

The Germans will say that their cloth is identical with the English cloth—say broadcloth. If a Chinaman takes an English sample to them they will say they will get the same cloth, but when the samples arrive the German article is found to be inferior to the British. Britain was in the position of being a monopolist at one time, and monopolists are very difficult to move. It is only when they begin to feel the opposition seriously affecting their business that the British manufacturers will move.

56. Soaps.—There used to be a very good imitation of Pears' soap on this market. Pears' soap is very largely advertised, and nearly every Chinese dealer keeps German imitations of this soap, and the fraud is so like the original that it is difficult to discriminate.

The labels and packages are identical. It is shipped from Antwerp, and comes straight to Hong Kong.

57. Spirits.—There is probably about half a score or a score of imitations of Scotch whisky. There are scores of them put under a fictitious name, such as Donald McAlpine, which can be got for $2.50 a case of one dozen quarts. There is no imitation of gin.

63. Umbrellas and Parasols.—This is an important trade. The French and Germans have got about one-half of it. It used to be entirely British, but the British have now only about a quarter of the trade, and Japan and other countries the other quarter. The English umbrella is very rough and ungainly in comparison with the continental article. The umbrellas that used to be bought for 130*s.* a dozen in England can now be laid down in Hong Kong for something like $30 per dozen, and they are beautiful, good-looking articles, with patent catches, and all the latest improvements. The Japanese send some rubbish down to the market, but they are improving as time goes on, and Japan in time will probably take over the bulk of the trade.

General Remarks.

The Germans are always bringing things forward for which there is a demand. They appear simple things, but there is a considerable amount of business done in them. Balloons, for instance, and beads, and such like articles. They do a business in that class of goods. The Chinese will order two or three thousand gross of squeaking balloons at a time, and that means a big business. They are a French manufacture, but the Germans do the business. The beads are Austrian, and there is nothing British to compare with them. The British do a small trade in beads.

Relative to the growth of the trade done, the foreigners here get a larger share compared with the trade done now than that done 20 years ago. It is chiefly in exports that it tells, and it is chiefly owing to their very great intelligence, great painstaking and care, and general information. Nearly the whole growth in exports from the East, so far as regards new articles, is owing practically to the German. He has been the first to see the value of any new article, the first to experiment, the first to send it home, the first to find out what it was worth.

With regard to imports he will take up an article that is entirely unknown to the Chinese, and begin to make a market for it. It may be infinitesimal at first, but he pushes and pushes it until it is quite a respectable article to handle. He will take up articles that British merchants would cast aside as too small to trouble with.

The British manufacturer has not shown an adaptability to the requirements of the market. He sticks to the old sizes, the old colours, old weights, old qualities, and old styles.

As regards prices Germans will invariably almost give a quotation for an article c. i. f. to Hong Kong. A British manufacturer will give the price of an article in Sheffield, and the agent here will probably come to grief in charges.

British trade is suffering and will go on suffering by excessive freights. The British manufacturers do not seem to be able to control the shipping companies. The rate of the measurement goods from London is 42*s.* 6*d.* per ton, which is not to be compared with continental rates.

All steamers will take a cheaper freight from Antwerp than from London. Frequently they will go to Antwerp and then back to London to fill up; girders are shipped from Antwerp at 19*s.* a ton, against 25*s.* at least from London.

Freights from England have had much effect upon British trade, more particularly in recent years; they have had an effect in favour of American shippers. A ton of 40 cubic feet from New York is brought through the canal for 30*s.*, whereas the freight on British goods from Liverpool alone is 57*s.* 6*d.*, or almost double. That is handicapping the Lancashire trade.

For cotton goods—outwards—the freight by a Conference steamer from Manchester to China *viâ* Liverpool is 57*s.* 6*d.* per ton of 40 cubic feet. The rail costs 10*s.*; these are the approximate figures. The steamer therefore gets 47*s.* 6*d.* per ton. *Viâ* London the total freight is also 57*s.* 6*d.*, but the cost of rail is 25*s.*, so that the steamer receives only 32*s.* 6*d.* per ton. *Viâ* the Manchester Canal, that is shipped in the docks on the Canal, the freight is 56*s.* 9*d.*; cartage amounts to 4*s.* 9*d.*, so that the steamer earns 52*s.* In this case, however, the steamer has to pay the expenses of going to Manchester, and is therefore entitled to a little more for loading there. *Viâ* Bremen (this is not Conference) the freight is 50*s.* 3*d.*, rail costs 20*s.* 3*d.*, and that leaves 30*s.* for the steamer. In comparison with the above:—Direct steamers from New York to Shanghai charge from 25*s.* to 30*s.*; Conference steamers carry American cotton goods from New York to Shanghai at 25*s.* to 26*s.* 6*d.*, and out of this they pay the Atlantic steamer about 7*s.* 6*d.*, leaving only 17*s.* 6*d.*, to 19*s.* for the steamer from Liverpool to Shanghai. This is the same class of goods competing with the goods shipped from Liverpool and paying the conference steamer from Liverpool 47*s.* 6*d.* The White Star line of steamers from New York (*viâ* Liverpool) to Shanghai will take cargo at 26*s.* 6*d.*, with transhipment at Liverpool into the China steamers; deduct 7*s.* 6*d.* from that for the Atlantic steamer, and these American goods have to pay very much less for the cost of transport from England to China than the Manchester goods. There is another route for these American cotton goods. The Canadian Pacific line is carrying a great deal, and is getting a very fair rate. From the mills in the Eastern States, U.S.A., to Shanghai the freight is $12\frac{1}{2}$ (gold) or equal to 51*s.* 6*d.* The Canadian Pacific send cars to the mill, and by loading the bales from the manufactory save the cost of transit from the mill to New York, which would amount to about 8*s.* 3*d.* per ton. That, of course, is very much better for the manufacturer. The Northern Pacific line carries American cotton goods from the mills in the Eastern and Southern States for $14 (gold), or, say, 57*s.* 9*d.*; and the mill-owners save on the Eastern mills 8*s.* 3*d.* and on the Southern mills 14*s.* 6*d.* by not having to send their goods to New York. In any case, by sending their goods over this very quick route, with 3,000 miles of rail, it is cheaper than to send direct from Manchester to Shanghai *viâ* Suez; but, of course, nothing like so cheap as from New York to Liverpool with trans-shipment to China, or from New York to Shanghai direct.

Rates for machinery.—At present the rates charged by the Conference from Liverpool to Shanghai are—light, 35*s.* per ton of 40 feet measurement; heavy, under five tons, 40*s.* per ton; heavy, over five tons, 42*s.* 6*d.* per ton. Special arrangement is made for anything above ten tons. Boilers pay about 6*l.* per ton. There is a lot of machinery out just now for the cotton mills lately started in Shanghai and the other industries being started throughout China. Direct steamers from New York are quoting to Shanghai 27*s.* 6*d.* to 28*s* 6*d.* for light machinery, and 32*s.* 6*d.* for heavy; and probably they will take lower rates for any larger quantity. The Americans manufacture cotton mill machinery, but they cannot manufacture it so cheaply as the British manufacturer can. These lower freights give the Americans the pull. Machinery takes up a lot of space, and freight is a very important item in the laying down price.

There is no cheaper dead-weight freight from the Continent than from London; 15*s.* per ton is the cheapest dead-weight freight, and you get that from London always.

NEW SOUTH WALES.

No. 22.

VISCOUNT HAMPDEN to Mr. CHAMBERLAIN.

(Received July 27, 1896.)

Government House, Sydney,
June 22, 1896.

Sir,

Adverting to your Despatch of the 28th November last, in which you express your desire to investigate the extent to which, in each of the Colonies, foreign imports of any kind have displaced, or are displacing, similar British goods, and the causes of such displacement, and asking to be furnished with a return showing the necessary information so far as this Colony is concerned, I have now the honour to transmit herewith, in original, reports that have been received from the Collector of Customs and the Sydney Chamber of Commerce.

Upon the receipt of these documents, I inquired of the Premier and Colonial Treasurer whether he desired to make any comments on your despatch, but Mr. Reid has now informed me that he does not propose to add anything to the reports obtained in compliance with your wishes.

I have, &c.,
HAMPDEN.

Enclosure 1 in No. 22.

Custom House, Sydney,
February 18, 1896.

Sir,

The accompanying Despatch, dated 28th November 1895, addressed to his Excellency the Governor by the Secretary of State for the Colonies, expresses a desire to investigate thoroughly the extent to which, in each of the Colonies, foreign imports of any kind have displaced, or are displacing, similar British goods, and the causes of such displacement.

Following the minute of the Premier requesting me to furnish a preliminary report as to the best means of obtaining the information sought, I have prepared a return of imports in the form required by Annexe 1 and Annexe 3, which is now submitted.

In preparing this return, I have followed as closely as possible the list of commodities given in the despatch and contained in Annexe 1, and the suggestions in Annexe 2; but in doing so I have experienced the difficulty mentioned in paragraph 6 of the letter, the classification of goods being in some respects different to that in use in this Colony. For all practical purposes, however, I believe that the object in view has not been lost sight of, viz., the desire to ascertain the extent to which foreign imports have displaced, or are displacing, similar British goods in New South Wales.

The concluding paragraph in clause 4 of Mr. Chamberlain's letter, refers to a difficulty which has been felt here for many years, and has created some confusion in the endeavour to locate the origin of manufactured goods exported to the Colony.

This has been to a large extent brought about by the subsidies paid by the Governments of European countries, to ocean steam vessels trading with the Australasian Colonies.

The competition in freights has transferred British goods to French and German ports for transhipment to Australia. This has been more observable in the shipments of goods required to meet the seasons here, and applies principally to articles of apparel or the materials for the making of dress. The heavy goods produced in other countries find cheaper freights by sailing vessels from Great Britain to the Colonies, and the transhipments are, I think, balanced as between England and the Continent, the more expensive articles sent from English ports by way of the Continent, being placed against the goods transhipped by way of Great Britain in sailing vessels, at lower freights than can be elsewhere obtained.

But apart from the possibility of such a balance of values as that I have referred to, I may state that every effort has been made by the officers of this Department in charge of the statistics of imports to ascertain the origin of goods received from ports in Europe. The consignees have been communicated with, and, in a majority of instances,

Great Britain has been properly credited with the trade origin of goods arriving at Sydney *viâ* foreign ports in foreign vessels.

Before entering upon the details of the return prepared and furnished herewith, I desire to state my opinion that in New South Wales foreign imports have not displaced British manufactured goods of a similar character to any great extent, and in support of that opinion I beg to call attention to a comparison of the value of all the imports into the Colony for the years 1884, 1889, and 1894, being the years named in the despatch addressed to his Excellency the Governor.

The figures upon which this comparison is based will be found in the return following that giving the value of commodities imported into New South Wales, and furnished as directed by Annexe 1 :—

Year.	Colonial and British Trade.	Foreign Trade.
	Value per Cent.	Value per Cent.
1884	90·280	9·720
1889	88·345	11·655
1894	91·040	8·960

I think an examination of this return will show that the Colonies of Australasia are gradually increasing their manufactures, and that any falling off in the importation of British manufactured goods is to be accounted for by the development of Colonial industries, and not by the importation of similar goods from foreign sources of supply.

Value of Imports into New South Wales from—

Year.	Australasia.	Great Britain.	British Possessions.
	£	£	£
1884	35,805	50,042	4,433
1889	46,570	38,212	3,563
1894	49,324	37,866	3,850

Year.	Europe.	United States.	Other Foreign Countries.
	£	£	£
1884	2,967	4,182	2,571
1889	3,776	4,788	3,091
1894	3,707	3,433	1,820

The trade with the other Colonies appears to be steadily increasing, and British trade has decreased in proportion only to the increase of Inter-Colonial trade, but foreign trade shows little change, and certainly no increase.

Referring to the return prepared to supply the information requested by the Secretary of State for the Colonies, I beg to inform you that the particulars have been compiled carefully for each item, and the instructions have been followed as closely as possible.

Commencing with commodity No. 3 in the return. I believe the figures are unreliable as given for the trade with Germany. The causes are accurately shown in the final paragraph of clause 4 of the despatch of 28th November, that these goods are mainly the manufactures of Great Britain forwarded to New South Wales *viâ* German ports by subsidised steamers carrying the German flag. But I am also compelled to admit that

NEW SOUTH WALES.

the return is unreliable as to the statistics of printing paper, preserved milk, sparkling wines, and other lines transhipped in London and entered by merchants as of British origin.

Item 11.—Candles. The great falling off in the importation from Great Britain, and also from foreign ports, is due to the establishment of candle factories in the Colony.

Item 30.—Nails. British trade in nails shows shrinkage, and foreign trade appears to be increasing.

Item 32.—Tools of trade. Prior to 1889 tools of trade were included under the heading "hardware" and no separate record was kept, but there is reason to believe that tools manufactured in the United States are much more in demand in this Colony than in the past, and that there is a steady increase in this trade.

Item 33.—Surgical instruments. In this branch of trade also American goods are taking a prominent place.

Item 34.—Leather unwrought. The imports from the United States were for:—

	Value
	£
1884 - - - - -	13,966
1889 - - - - -	22,716
1894 - - - - -	27,662

The trade from Great Britain has remained for 15 years without increase.

Item 40.—Wire. The importations from Belgium and Germany are increasing, nearly half the value of the imports for 1894 were entered from foreign ports.

Item 41.—Musical instruments. The cheaper kinds are mainly imported from Europe; this has been the case for the whole period under notice, viz. 1884 to 1894. The foreign trade value is about half the value of the total importations.

Item 43.—Printing paper. Although the total imports for 1894 are entered for value as 113,872*l.*, and 21,683*l.* was entered as of foreign manufacture, I have reason to believe that a very much larger value should have been entered as of foreign manufacture; and that the entries have been made as for British goods because the packages arrived from Great Britain in British vessels.

Item 49.—Milk preserved. In this item I am also of opinion that the bulk of the importations are indirectly from foreign ports, and of foreign manufacture.

Item 57.—Tinctures. The trade with the United States is increasing considerably.

Item 64.—Wines sparkling. The values given as representing the place of origin are doubtless erroneous, and show that goods are frequently entered as the produce of the place of shipment.

I have commented upon each item of the return in which the interests of British trade appear to be specially concerned, and, in conclusion, I beg to recommend that the despatch to his Excellency the Governor, and the accompanying papers, be referred to the Chairman of the Sydney Chamber of Commerce, with a request that the Chamber will be good enough to furnish reasons based upon the mercantile experience of its members, which will account for the increasing importations from foreign countries of the following articles, viz.:—

Nails,	Tools of trade,	Wire,
Surgical instruments,	Tinctures.	Leather unwrought,
Musical instruments.		Printing paper.

Also information (and if possible a return) affording particulars of products of the Colony which might advantageously be exported to the United Kingdom, and the desirability or otherwise of sending patterns of goods, samples of tools, &c. to London, either in relation to the import or export trade of the Colony, as suggested by Clause 7 of the despatch, and Clause 6 of Annexe 2 thereof.

I have, &c.

JAMES POWELL,
Collector of Customs.

The Under-Secretary Finance and Trade.

Return showing the VALUE of GOODS IMPORTED into the Colony of NEW SOUTH WALES for the years 1884, 1889, 1894—separating Foreign and British Trade.*

Commodity.	Total Value of Importation.			Country.	Value of Importation from Foreign Countries.		
	1884.	1889.	1894.		1884.	1889.	1894.
	£	£	£		£	£	£
1. Alkali	8,938	20,008	36,933	Foreign countries	Nil.	—	—
2. Animals, horses	114,260	126,839	90,487	United States	2,000	—	—
3. Apparel and slops :—							
Apparel	838,591	1,046,146	755,370	United States	1,020	3,628	6,507
				China	2,022	2,064	614
				France	7,700	5,073	4,856
				Germany	3,917	9,913	31,373
				Belgium	—	1,010	1,827
				Total	14,659	21,688	45,277
Drapery	3,217,159	2,164,906	1,544,144	China	7,743	608	1,820
				Belgium	7,157	984	608
				France	84,076	21,167	9,160
				Germany	17,758	30,441	15,268
				Japan	—	—	659
				United States	2,500	2,495	2,794
				Total	119,234	55,695	30,309
Gloves	—	93,422	71,393	France	—	6,806	2,364
				Germany	—	2,495	1,675
				Total	—	9,301	4,039
Millinery	—	—	21,156	Germany	—	—	640
Woollen manufactures :—							
Blankets	—	47,729	31,458	From foreign countries	Nil.	—	—
Rugs	—	—	6,617	From foreign countries	Nil.	—	—
Other sorts	—	—	22,668	France	—	—	1,563
				Belgium	—	—	1,202
				Germany	—	—	8,109
				Total	—	—	10,874
Silks	—	134,643	63,498	China	—	8,988	6,886
				France	—	10,430	5,299
				Japan	—	582	1,566
				United States	—	—	1,051
				Germany	—	2,537	—
				Total	—	22,537	14,802
4. Arms and ammunitions :—							
Firearms	32,927	86,484	10,560	United States	1,368	8,093	1,273
				Belgium	1,320	837	1,129
				Germany	1,964	2,808	2,835
				Total	4,652	11,738	5,237
Gunpowder	23,845	24,881	5,706	From foreign countries	Nil.	—	—
All other kinds	111,632	94,369	75,891	Germany	10,628	8,173	1,652
				United States	—	5,199	3,081
				Belgium	—	831	—
				Total	10,628	14,203	4,733
5. Bags (empty)	28,309	46,900	88,055	India	11,824	32,812	66,942
Woolpacks	61,102	53,618	98,441	India†	25,988	28,320	72,550
6. Beer and ale	322,965	488,094	260,126	United States	10,693	8,647	—
				Germany	19,441	11,144	6,411
				Total	30,134	19,791	6,411
7. Biscuits and bread	11,592	4,084	1,513	From foreign countries	Nil.	—	—
8. Bleaching materials	—	—	—	—	—	—	—
9. Books printed	218,640	182,369	129,750	United States	16,353	3,778	4,831
				France	—	577	1,200
				Germany	—	826	850
				Total	16,353	5,181	6,881

* This Return refers only to goods named in the letter from the Secretary of State for the Colonies, dated 28th November 1895.
† Apparently there is a slip here in including British India as a foreign country. *See also* under sugar, "Mauritius."

Commodity.	Total Value of Importation. 1884.	1889.	1894.	Country.	Value of Importation from Foreign Countries. 1884.	1889.	1894.
	£	£	£		£	£	£
9a. Brushware	44,580	32,825	29,433	United States	11,930	5,839	2,943
				China	—	516	608
				Germany	—	2,699	3,099
				Italy	—	1,088	1,203
				Total	11,930	9,542	7,853
10. Butter	147,148	82,116	14,314	From foreign countries	Nil.	—	—
11. Candles	169,865	55,565	44,075	France	4,835	—	—
				Belgium	23,625	7,689	19,921
				Germany	18,246	10,560	4,949
				Total	46,706	18,249	24,870
12. Caoutchouc, manufactured	19,540	24,594	18,170	United States	1,005	939	1,778
				Germany	1,317	3,115	616
				Total	2,322	4,054	2,394
13. Carriages and waggons (railway):— (Railway and tramway plant)	526,754	98,257	94,738	United States	30,600	2,938	2,494
14. Cement	216,353	118,712	72,223	Germany	44,020	5,917	1,463
				Belgium	—	928	592
				Norway	1,890	—	—
				Total	45,910	6,845	2,055
15. Cheese	22,688	118,712	2,485	Germany	—	5,917	517
				Belgium	—	928	—
				Total	—	6,845	517
16. Chemical products and dye stuffs:— (a.) Dye stuffs	*	8,256	5,189	United States	*	713	1,223
				Germany	—	—	585
				Total	—	713	1,808
(b.) Acids	17,994	17,729	17,455	Germany	—	1,277	1,066
				Belgium	—	1,266	1,615
				Total	—	2,548	2,681
(c.) Sulphur	3,242	8,706	8,668	Japan	—	—	3,555
				France	—	510	—
				Total	—	510	3,555
(d.) Other chemical products.	†	30,999	62,580	United States	—	2,481	2,665
				Germany	—	2,864	2,597
				France	—	—	4,247
				Belgium	—	—	2,808
				Total	—	4,845	12,317
17. Clay, unmanufactured	Not imported.						
18. Clocks and watches	129,019	24,881	28,569	United States	40,057	9,756	6,216
				France	6,142	7,319	1,577
				Germany	—	1,609	—
				Italy	—	3,975	—
				Total	46,199	22,659	7,793
19. Coals	Not imported.						
20. Cordage and twine	62,365	43,103	23,845	United States	916	—	—
				China	—	2,380	1,258
				Total	916	2,380	1,258
21. Corn:— (a.) Wheat	86,466	637,549	28,351	United States	—	142,397	—
(b.) Wheat-flour:	519,656	741,189	214,259	United States	—	54,490	—
Bran and pollard	65,916	53,429	10,351	United States	—	829	—
(c.) Maize	24,950	85,482	6,601	United States	4,550	4,602	1,774
				New Caledonia	5,157	8,853	—
				Total	9,707	13,455	1,774

* In 1884 dyestuffs were included under head "Drugs, &c."
† In 1884 chemical products are included under heading "Drugs, medicine, &c"

Commodity.	Total Value of Importation.			Country.	Value of Importation from Foreign Countries.		
	1884.	1889.	1894.		1884.	1889.	1894.
21. Corn—*cont.*	£	£	£		£	£	£
(*d.*) Oats	241,850	156,776	71,012	United States	—	12,076	—
(*e.*) Barley	18,985	23,462	4,815	United States	5,900	7,537	—
(*f.*) Beans	2,065	1,317	1,186	New Caledonia	—	868	—
(*g.*) Peas	1,979	8,869	5,784	——	—	—	—
22. Cotton yarn	Included under heading No. 3.			} Apparel, &c.			
23. Cotton manufactures	Included under heading No. 3.						
24. Earthenware and Chinaware (including manufactures of clay).	163,526	144,942	31,192	Germany	2,723	6,095	2,231
				Belgium	930	1,294	—
				France	2,102	886	1,756
				China	1,465	—	892
				Japan	—	—	726
				Total	7,220	8,275	5,605
25. Fish, salt, dried, and preserved	184,443	129,426	53,303	France	1,038	—	—
				United States	80,499	56,555	14,754
				China	3,847	6,559	1,682
				Germany	—	558	—
				Total	85,384	63,672	16,436
26. Furniture, cabinet and upholstery.	305,114	218,337	45,468	Germany	20,843	36,783	3,272
				France	881	—	—
				United States	22,771	20,760	5,272
				China	1,692	6,958	2,582
				Japan	—	—	760
				Total	46,187	64,501	11,893
27. Glass:—							
(*a.*) Plate, rough or silvered	40,465	22,384	7,608	Germany	2,335	521	732
				Belgium	942	—	1,272
				Total	3,277	521	2,004
(*b.*) Window	45,581	18,788	6,754	Germany	761	718	1,945
				Belgium	3,698	6,524	2,313
				Total	4,459	7,242	4,258
(*c.*) Glassware	81,927	57,553	25,199	Germany	4,939	11,010	7,276
				United States	3,838	2,017	2,095
				France	—	503	—
				Belgium	—	6,079	1,021
				Total	8,777	19,609	10,392
(*d.*) Bottles, empty	*	24,964	5,800	Germany	—	—	879
28. Grease, tallow and animal fats:—							
(*a.*) Grease	2,874	3,205	3,807	United States	1,787	1,831	2,831
(*b.*) Tallow	56,056	35,002	250,010	New Caledonia	—	974	—
29. Haberdashery and millinery	Included under heading No. 3, Apparel, &c.						
30. Hardware	716,892	476,441	178,407	Germany	5,314	12,801	12,509
				Belgium	2,369	1,740	2,487
				France	1,426	1,827	—
				United States	90,597	79,396	21,981
				China	—	845	—
				Total	99,706	96,609	36,977
(*a.*) Cutlery	33,590	43,363	30,775	Germany	681	3,336	1,904
				United States	—	786	—
				Total	681	4,122	1,904
(*b.*) Brassware	†	25,285	19,953	France	—	—	626
(*c.*) Bedsteads	†	60,995	12,095	Germany	—	896	—
(*d.*) Bolts, screws, &c.	†	20,526	18,333	United States	—	—	1,316
(*e.*) Cycles	—	5,015	17,169	United States	—	524	554

* Included this year under heading "Glassware."

† Included under heading "Hardware."

§ 94700.

Commodity.	Total Value of Importation. 1884.	1889.	1894.	Country.	Value of Importation from Foreign Countries. 1884.	1889.	1894.
	£	£	£		£	£	£
30. Hardware—*cont.*							
(*f.*) Chains	3,732	4,509	3,121	From foreign countries	Nil.	Nil.	Nil.
(*g.*) Gas fittings	22,524	45,285	15,904	Germany	—	984	1,204
(*h.*) Nails	46,460	28,388	25,058	Germany	2,854	4,365	7,840
				Belgium	1,407	3,816	4,660
				United States	2,991	2,131	1,787
				Total	6,752	10,312	14,287
(*i.*) Tinware	24,219	15,845	8,672	United States	856	1,262	878
31. Hats	*	158,550	151,524	Belgium	*	778	1,232
				Germany	—	4,184	3,032
				France	—	2,190	636
				Total	—	7,152	4,900
32. Implements and tools of industry:—							
(*a.*) Agricultural implements.	86,434	66,769	39,098	Germany	1,874	—	—
				United States	15,696	5,703	7,414
				Total	17,070	5,703	7,414
Tools of trade	†	†	85,547	United States	†	†	36,879
				Germany	—	—	1,904
				France	—	—	548
				Total	—	—	39,331
33. Instruments and apparatus:—							
(*a.*) Optical	5,613	8,579	5,477	France	767	762	743
(*b.*) Scientific	14,937	4,665	2,545	From foreign countries	Nil.	Nil.	Nil.
(*c.*) Surgical	6,522	7,671	7,586	United States	—	2,533	2,786
				Germany	—	831	1,059
				Total	—	3,364	3,845
34. Leather:—							
(*a.*) Unwrought	74,543	65,031	74,406	United States	13,966	22,716	27,662
				China	—	590	—
				Germany	—	1,186	1,888
				France	—	1,136	2,253
				Total	13,966	25,628	31,803
(*b.*) Saddlery and harness	76,123	42,315	17,296	United States	5,299	3,655	2,325
(*c.*) Saddlers' ware	36,006	40,185	31,411	United States	1,081	1,077	2,015
(*d.*) Boots and shoes	581,820	584,518	297,847	Germany	15,866	63,917	26,035
				France	16,165	28,474	2,471
				United States	706	1,097	3,756
				China	590	1,595	—
				Austria	—	—	787
				Total	33,327	95,183	33,049
35. Linen and jute yarn	Not imported.						
36. Linen and jute manufactures	Linen manufactured under heading apparel, drapery, &c. For jute manufactures *see* item No. 5, bags and woolpacks.						
37. Machinery	581,210	466,118	—	United States	65,479	53,104	—
				Germany	3,848	13,103	—
				Belgium	3,155	1,107	—
				China	500	—	—
				France	—	734	—
				Total	72,982	68,048	—
(*a.*) Agricultural	‡	‡	35,373	United States	—	—	1,877
(*b.*) Electric	‡	‡	974				
(*c.*) Sewing	64,259	49,322	29,249	Belgium	11,140	—	—
				United States	12,742	23,032	21,120
				Germany	—	16,808	2,700
				Total	23,882	39,940	23,820

* Included for this year under heading "Apparel," &c.
† In 1884 and 1889 tools of trade were included under general heading "Hardware."
‡ Included for 1884 and 1889 under general heading of "Machinery."

Commodity.	Total Value of Importation.			Country.	Value of Importation from Foreign Countries.		
	1884.	1889.	1894.		1884.	1889.	1894.
37. Machinery—*cont.*	£	£	£		£	£	£
(*d.*) Engines	*	*	10,092		—	—	—
(*e.*) Other machinery	*	*	144,566	Belgium	—	—	641
				Germany	—	—	3,292
				United States	—	—	12,717
				Total	—	—	16,650
38. Manure	†	2,718	3,651	Belgium	—	—	732
39. Medicines, drugs, and apothecaries' ware.	277,570	202,566	126,054	United States	28,183	17,032	9,844
				Japan	—	—	550
				Germany	4,261	6,263	5,956
				France	1,523	1,188	895
				China	2,504	3,803	1,170
				Italy	—	2,087	—
				Belgium	579	—	—
				Total	37,050	30,273	18,355
40. Metals:—							
(*a.*) Iron and steel	327,445	—	—	Germany	12,354	—	—
				France	503	—	—
				Norway	1,000	—	—
				Total	13,857	—	—
(*b.*) Old iron	2,501	1,634	3,293	From foreign countries	Nil.		
(*c.*) Pig	‡	29,454	11,976	From foreign countries	Nil.		
(*d.*) Bar, angle, and rod	‡	141,297	45,960	Belgium	—	3,964	1,093
				Germany	—	3,070	588
				Total	—	7,034	1,681
(*e.*) Railroads	Included under heading Railway and tramway plant.						
(*f.*) Sheet and plate	‡	§	16,436	Germany	—	—	2,797
				Belgium	—	—	1,783
				Total	—	—	4,580
(*g.*) Pipes	70,931	119,311	54,265	Germany	—	530	—
(*h.*) Wire	100,859	112,628	119,536	Belgium	3,914	4,110	26,760
				United States	1,045	—	3,426
				Germany	—	23,441	25,886
				Holland	—	733	—
				Total	4,959	27,284	56,072
(*i.*) Sheets galvanised	379,804	230,652	202,311	Belgium	—	2,468	1,693
				Germany	—	3,971	755
				Total	—	6,439	2,448
(*j.*) Castings	50,612	13,195	12,432	United States	2,327	—	—
(*k.*) Tinplates	34,921	29,463	59,933	From foreign countries	Nil.		
(*l.*) Tanks	6,128	15,589	12,903	From foreign countries	Nil.		
Iron:—							
Other manufactures	18,957	167,099	20,347	Belgium	—	15,146	1,827
				Germany	—	2,964	4,331
				United States	—	2,643	—
				Total	—	20,753	6,148
Copper, unwrought	Not imported.						
„ wrought	—	5,514	2,464	From foreign countries	Nil.		
„ yellow metal	27,168	19,431	12,784	From foreign countries	Nil.		
Lead, pig	—	7,888	66,909	From foreign countries	Nil.		
„ sheet	42,890	33,020	809	From foreign countries	Nil.		
„ pipe	3,106	1,933	—	From foreign countries	Nil.		
Tin, unwrought	No importation beyond Australian Colonies.						
Zinc, unwrought	—	3,149	11,522	Belgium	—	—	2,154
„ wrought	4,782	3,927	5,813	Belgium	—	981	1,670
				Germany	—	—	642
				Total	—	981	2,312
41. Musical instruments	179,294	139,951	44,724	Germany	57,768	64,094	23,820
				Belgium	1,186	973	1,085
				France	1,823	3,167	1,090
				United States	15,429	8,336	2,636
				Total	76,206	75,570	28,631

* Included under general heading "Machinery." † No records for 1884.
‡ Included under heading "Iron and steel." § Included for 1889 under heading "Bar and angle rod."

Commodity.	Total Value of Importation.			Country.	Value of Importation from Foreign Countries.		
	1884.	1889.	1894.		1884.	1889.	1894.
	£	£	£		£	£	£
42. Oil and floorcloth - -	45,074	55,745	46,915	Germany - -	—	—	2,045
				Belgium - -	—	—	5,179
				Total - -	—	—	7,224
43. Oil:—							
(a.) Animal - -	35,041	20,602	9,756	United States - -	10,006	1,110	1,481
				China - -	21,378	17,735	4,546
				South Sea Islands -	—	—	783
				Total - -	31,384	18,845	6,810
(b.) Vegetable - -	137,924	97,233	67,907	New Caledonia -	1,236	712	—
				France - -	2,122	1,775	1,474
				Germany - -	—	—	722
				Seychelles - -	—	—	604
				United States - -	—	—	2,399
				Italy - -	—	—	512
				Total - -	3,358	2,487	5,711
(c.) Mineral - -	38,657	68,585	65,410	United States - -	25,556	58,251	55,167
(d.) Other oils - -	25,393	23,739	36,158	United States - -	6,488	7,676	8,849
				China - - -	5,817	—	3,027
				Germany - - -	—	884	1,044
				Japan - - -	—	—	1,150
				Total - -	12,305	8,560	14,070
44. Painters' colours and materials:—							
(a.) Paints - -	93,731	70,782	59,716	Germany - - -	1,194	1,052	1,490
				United States - -	7,848	3,142	3,802
				China - - -	—	—	529
				Total - -	9,042	4,194	5,821
(b.) Painters' materials -	6,118	1,954	3,462	United States - -	1,616	—	607
45. Paper:—							
(a.) Printing - - -	157,785	128,643	113,872	United States - -	—	1,416	18,084
				Germany - - -	4,679	1,224	2,879
				Belgium - - -	—	—	720
				Total - - -	4,679	2,640	21,683
(b.) Writing, including envelopes.	11,239	23,460	42,118	From foreign countries -	Nil.		
(c.) Wrapping, including paper bags.	39,243	35,461	38,129	United States - -	—	3,870	3,607
				Germany - -	—	—	6,474
				Belgium - - -	—	—	2,458
				Norway - - -	—	730	—
				Total - -	—	4,600	12,539
(d.) Hangings - -	17,061	22,450	11,551	China - - -	—	560	—
(e.) Printing material -	6,118	40,400	17,133	United States - -	1,616	3,311	3,962
				Germany - -	—	1,395	752
				Total - - -	1,616	4,706	4,714
46. Pickles and sauces - -	72,197	48,713	41,401	China - - -	2,170	2,636	1,356
(a.) Vinegar - -	15,870	9,658	11,889	Germany - -	722	—	—
47. Pictures, including mouldings	43,835	68,494	11,227	Germany - - -	—	5,873	1,340
				United States - -	1,749	1,894	778
				Total - - -	1,749	7,767	2,118
48. Plate and plated ware -	85,619	80,527	38,883	France - - -	804	—	—
				United States - -	10,804	7,970	3,138
				Germany - - -	—	883	—
				Total - -	11,608	8,853	3,138
(a.) Jewellery and precious stones.	178,623	78,273	51,105	United States - -	820	985	—
				Germany - - -	—	913	—
				Total - -	820	1,898	—

Commodity.	Total Value of Importation.			Country.	Value of Importation from Foreign Countries.		
	1884.	1889.	1894.		1884.	1889.	1894.
	£	£	£		£	£	£
49. Provisions:—							
(a.) Chicory	4,859	1,533	—				
(b.) Chocolate and cocoa	29,171	29,797	35,132	France	777	—	—
				Germany	—	—	1,674
				Total	777	—	1,674
(c.) Coffee	34,624	31,290	30,942	Aden	—	—	634
				United States	7,658	6,065	7,025
				New Hebrides	—	—	1,068
				China	—	2,600	—
				New Caledonia	—	1,522	3,822
				Germany	—	901	—
				Total	7,658	11,089	12,549
(d.) Confectionery	28,462	28,755	17,684	France	908	—	—
				United States	—	1,258	1,316
				China	—	3,833	—
				Total	908	5,091	1,316
(e.) Cordials, &c., non-spirituous.	20,102	10,151	4,164	United States	905	—	—
(f.) Cornflour and Maizena	4,938	1,787	2,520	United States	1,795	—	—
(g.) Fruits, dried and preserved.	174,294	128,361	61,204	France	584	—	1,664
				Egypt	1,949	9,180	3,656
				China	8,180	6,596	5,806
				United States	28,676	29,978	8,229
				Germany	—	593	—
				Turkey	—	561	730
				Italy	—	—	1,090
				Greece	—	—	3,894
				Total	34,389	46,908	25,069
(h.) Farinaceous and milk foods.	—	7,795	14,687	United States	—	—	536
(i.) Jams and jellies	101,702	59,044	10,474	From foreign countries	Nil.		
(j.) Gelatine and isinglass	—	4,882	6,283	From foreign countries	Nil.		
(k.) Vermicelli and macaroni.	2,188	2,933	2,281	France	—	1,369	—
				Italy	—	—	714
				Total	—	1,369	714
(l.) Meats	210,544	97,662	44,554	United States	3,243	10,324	5,732
				Germany	570	—	—
				China	2,334	618	—
				France	1,189	—	—
				New Caledonia	—	4,583	—
				Total	7,336	15,520	5,732
(m.) Milk, preserved	—	76,501	48,294	Italy	—	—	7,083
				United States	—	—	504
				Total	—	—	7,587
(n.) Mustard	16,619	12,825	24,561	From foreign countries	Nil.		
(o.) Oilmen's stores other than sauces and pickles.	25,559	34,872	12,002	United States	4,580	7,710	—
				France	—	997	—
				Total	4,580	8,707	—
(p.) Vegetables, preserved, &c.	7,960	9,301	3,223	China	937	2,413	—
				United States	1,629	2,093	—
				France	—	526	—
				Total	2,566	5,032	—
50. Rags and other material for paper making.	None imported.						
51. Salt:—							
(a.) Rock	5,110	8,217	7,049	Germany	588	2,746	2,603
(b.) Other	31,994	20,224	46,009	France	17	6	465
52. Seeds of all sorts	17,714*	12,521	15,532	Germany	—	660	—
				United States	1,211	—	—
				Total	1,211	660	—

* In 1884 plants and seeds were classed together.

Commodity.	Total Value of Importation. 1884.	1889.	1894.	Country.	Value of Importation from Foreign Countries. 1884.	1889.	1894.
					£	£	£
53. Silk, thrown, twist, and yarn -	Included in amount under heading Drapery, &c.						
54. Silk manufactures - -	Included under heading Silks, item No. 8.						
55. Skins and furs :— British - - - Foreign, British dressed -	No importations from foreign countries.						
	£	£	£				
56. Soap - - - - -	22,802	28,041	34,685	Germany - -	—	971	—
				United States - -	—	1,090	2,827
				Total - -	—	2,061	2,827
57. Spirits :—							
(a.) Brandy - -	364,146	175,730	76,741	France - - -	51,824	11,864	2,388
				Italy - - -	1,000	—	—
				Germany - -	—	764	1,846
				Total - - -	52,824	12,628	4,234
(b.) Rum - - -	71,216	43,002	29,867	France - - -	—	1,057	1,093
				Fiji - - -	—	—	5,161
				Total - - -	—	1,057	6,254
(c.) Geneva - -	59,502	51,848	29,850	Belgium - - -	519	3,438	—
				Germany - -	8,440	37,699	12,956
				Holland - - -	—	800	—
				Total - -	8,959	41,937	12,956
(d.) Gin - - -	21,336	6,584	5,022	Belgium - - -	1,002	—	—
				Germany - - -	3,214	—	—
				Total - -	4,216	—	—
(e.) Whiskey - - -	145,461	171,607	177,577	United States - -	510	—	—
				Germany - -	—	—	501
				Total - - -	510	—	501
(f.) Liqueurs - -	8,763	10,091	8,753	Germany - -	559	—	—
				France - - - -	714	661	702
				China - - -	3,038	6,765	2,015
				Total - - -	4,311	7,426	2,717
(g.) Perfumed - -	18,573	18,391	11,030	United States - -	—	2,588	1,513
				France - - - -	—	1,205	953
				Germany - - -	—	2,282	828
				Total - - -	—	6,075	3,094
(h.) Methylated - -	3,181	1,701	756	Germany - -	936	1,171	619
(i.) All other, includes tinctures, essences, and spirituous compounds.	14,008	7,524	27,047	United States - -	6,310	3,521	7,687
				Germany - -	2,327	2,053	770
				China - - - -	—	—	733
				Total - -	8,637	5,574	9,190
58. Stationery, other than paper -	183,546	148,370	101,308	Germany - - -	3,013	5,877	1,885
				United States - -	2,732	13,736	4,368
				Belgium - - -	—	571	—
				France - - -	639	623	—
				China - - - -	588	578	—
				Total - -	6,972	21,385	6,248
59. Stones and slates :—							
(a.) Stones - -	31,163	12,369	1,743	From foreign countries -	Nil.		
(b.) Statuary and monuments.	*	1,558	4,132	Germany - - -	—	—	1,468
				Italy - - -	—	2,586	—
				Total - - -	—	2,586	1,468
(c.) Marble, wrought -	23,246†	2,784	7,558	Belgium - - -	1,620	1,435	3,981
				Germany - - -	687	—	1,886
				Italy - - -	—	—	527
				United States - -	748	—	—
				Total - -	3,055	1,435	6,394

* Included under heading "Marble, wrought."

† In 1884 wrought and unwrought marble were classed together.

Commodity.	Total Value of Importation.			Country.	Value of Importation from Foreign Countries.		
	1884.	1889.	1894.		1884.	1889.	1894.
59. Stones and Slates—*cont.*	£	£	£		£	£	£
(*d.*) Marble, unwrought -	—	25,776	2,411	Italy - - - -	—	3,307	555
				Belgium - - -	—	3,235	609
				Germany - - -	—	1,232	—
				France - - -	—	2,321	—
				Total - - -	—	10,095	1,164
(*e.*) Slates, roofing -	32,203	26,587	8,311	United States -	8,925	8,296	962
(*f.*) Slates, slabs - -	2,862	2,624	1,105	From foreign countries -	Nil.		
60. Grindstones - - -	948	610	542	From foreign countries -	Nil.		
61. Sugar - - - -	857,911	941,872	659,487	Germany - - -	1,366	1,034	—
				France - - -	7,701	—	—
				China - - -	156,514	149,445	11,699
				Mauritius - -	110,636	10,000	25,274
				Java - - - -	56,500	290,200	37,062
				United States - -	3,012	—	—
				Belgium - - -	—	—	1,190
				Total - -	335,729	450,679	75,225
Sugar, molasses - -	29,490	6,817	3,850	United States - - -	2,043	—	—
62. Telegraphic wire and apparatus, including telephone materials.	30,194	85,980	30,558	Belgium - - -	1,020	1,269	—
				Germany - - -	—	844	4,500
				United States - -	—	4,168	—
				Total - - -	1,020	6,281	4,500
63. Umbrellas and parasols -	Included under heading drapery, &c.						
64. Wood and timber, manufactured :—							
(*a.*) Doors, sashes, and shutters.	30,196	19,175	5,973	United States - -	20,803	16,182	4,503
(*b.*) Shooks and staves -	6,833	6,577	9,298	United States - -	—	2,240	919
				New Caledonia - -	689	—	—
				Germany - - -	—	1,312	—
				Total - -	21,492	19,784	5,422
(*c.*) Woodenware and turnery.	24,466	19,350	6,918	United States - -	13,150	14,219	4,556
				Germany - -	2,319	—	—
				China - - -	1,029	—	—
				Total - -	16,498	14,219	4,556
64*a*. Wines :—							
Sparkling - - -	47,286	50,789	23,835	Belgium - - -	—	1,783	4,020
				France - - -	1,815	22,176	3,387
				Germany -	—	—	1,557
				Total - - -	1,815	23,959	8,964
Other - - - - -	77,963	65,877	23,585	France - - -	2,654	2,589	1,300
				Germany - - -	—	737	802
				United States - -	—	542	—
				Belgium - - -	—	—	1,035
				Total - -	2,654	3,859	3,137
65. Wool - - - -	Not imported.						
66. Woollen and worsted yarn -	Not imported.						
67. Woollen and worsted manufactures.	Included under heading drapery, &c.						
Carpets and druggets - -	—	63,166	23,620	From foreign countries -	Nil.		
68. Yarn, alpaca, and mohair, and other sorts unenumerated.	Included under heading drapery, &c.						
69. Toys and fancy goods - -	195,035	156,185	129,655	Germany - - -	8,271	21,140	18,424
				France - - -	5,627	8,303	3,803
				United States - -	5,476	16,317	2,112
				China - - -	10,176	10,962	2,433
				Japan - - -	—	2,654	3,637
				Belgium - - -	—	—	681
				Total - - -	29,550	59,376	31,090

Total Value per cent. of all Imports into New South Wales.

1884.

Countries.		Total Value of Imports.	Per Cent.	Value per Cent.
		£		£ s. d.
Australasia		8,173,208	35·805	35 16 1
United Kingdom		11,423,047	50·042	50 0 10
Other British Possessions		1,012,008	4·433	4 8 8
Europe:—				
Belgium	74,904			
France	218,755			
Germany	337,881			
Italy	2,406			
Norway	43,208			
		677,154	2·967	2 19 4
United States		954,665	4·182	4 3 8
Other foreign countries		586,843	2·571	2 11 6
		22,826,985	100·	100 0 0

1889.

Countries.		Total Value of Imports.	Per Cent.	Value per Cent.
		£		£ s. d.
Australasia		10,647,312	46·570	46 11 5
United Kingdom		8,736,478	38·212	38 4 3
Other British Possessions		814,718	3·563	3 11 3
Europe:—				
Belgium	88,843			
France	179,900			
Germany	533,082			
Holland	1,879			
Italy	17,483			
Norway	25,196			
Sweden	16,831			
		863,214	3·776	3 15 6
United States		1,094,697	4·788	4 15 9
Other foreign countries		706,538	3·091	3 1 10
		22,863,057	100·	100 0 0

1894.

Countries.		Total Value of Imports.	Per Cent.	Value per Cent.
		£		£ s. d.
Australasia		7,794,168	49·324	49 6 5¾
United Kingdom		5,983,489	37·866	37 17 4
Other British Possessions		608,356	3·850	3 17 0
Europe:—				
Austria	1,304			
Belgium	115,119			
France	70,649			
Germany	345,364			
Italy	24,124			
Norway	29,193			
		585,753	3·707	3 14 2
United States		542,427	3·433	3 8 7¼
Other foreign countries		287,748	1·820	1 16 4½
		15,801,941	100·	100 0 0

Enclosure 2 in No. 22. NEW SOUTH WALES.

Sydney Chamber of Commerce,
Sydney, New South Wales, June 5, 1896.

SIR,

REFERRING to your letter of 26th February last, requesting the Chamber to favour you with the reason, based upon the experience of members of the Chamber, which will account for the increasing importation into New South Wales from foreign countries of certain articles named therein, I have now the honour, by direction of the Committee, to report as follows:—

(*a.*) *Nails.* } The low cost of these articles of Continental manufacture have led to
(*f.*) *Wire.* } their extensive use, but while generally inferior to those of British manufacture, they are good enough for all requirements.

(*b.*) *Surgical instruments.*—The American and German articles are considered to be better finished than the English goods, and are about the same price. The demand is not large.

(*c.*) *Musical instruments.*—The Continental makes are much cheaper than those from England.

(*d.*) *Tools of trade.*—Orders appear to be divided about equally between the United Kingdom, America, and Germany. One firm states: "We think agricultural "implements and tools of trade from England more than hold their own against "those of Continental manufacture owing to their better quality."

(*e.*) *Tinctures.*—One firm writes: "From the experience gained we believe that in "consequence of many European States producing, in fact over-producing, "spirits of wine from grain cereals, and from bye-products of the sugar industry, "against which production England seems unable to compete, the United "Kingdom is not in as favourable a position to produce tinctures, of which "spirit is an integral and most important part, as the Continent.

"The import of drugs for tinctures, &c. from Transatlantic countries to "Germany, the largest producer of tinctures on the Continent, has assumed "large proportions during the last 10 to 15 years, favoured by direct subsidised "steamship lines. The traffic in these drugs prior to this period took almost "exclusively its route by way of England."

(*f.*) See answer (*a*) and (*f*).

(*g.*) *Leather, unwrought.*—America sends chiefly heavy sole leather, the quantity of heavy hides procurable here being less than the demand. The price of the American is higher than our own, the quality also in the estimation of many being better.

America sends cow-hide—splits—worked as satin leather, better turned out than we do here. She also sends glacé skins and kid—none of which is produced here.

America also sends cowhide harness leather, which is dearer than our own, but better.

The Continent sends chiefly calf, kid, and levant skins, but no English leather of these grades worth mentioning comes here.

Of English make there is some little Persian and sheepskin imitation kid.

The general reason for the importation of foreign leather is better tanning and working. While price is a certain element, it is shown that higher prices are paid for leathers from America than for similar grades of colonial. As regards calf skins, we kill calves too early or too late, hence we have to import calf to so large an extent, and Continental calf is best.

(*h.*) *Printing paper.*—Germany, Austria, and America are all well timbered, and the lower grades of paper, such as printing paper, are made from cellulose, or wood pulp.

Low wages on the Continent have also much to do with the successful competition against the United Kingdom in paper.

The primary cause of this success is "cheap raw material."

A careful study of the numerous replies received by the Committee discloses the main fact of the increased importation of Continental and American manufactures to be "cheapness."

Other causes appear to be the readiness with which American and Continental manufacturers accede to the wishes of their customers in endeavouring to supply "what the customers ask for," whereas the British manufacturers as a rule will not depart from

the designs which may suit one trade, and which they try to make another community take; they will not cater for the wants of their customers, but endeavour to persuade all their customers to use one pattern.

The Committee have pleasure in stating that an almost unanimous opinion exists "that British goods are best in quality."

It is a moot question, which the Committee cannot fathom, whether, after all, the so-called increase in the quantity of foreign imports is an increase over the increasing population, or whether it is only an increase in proportion thereto.

Undoubtedly in some special lines Germany has made marked strides, but there are others in which the imports show an actual falling off.

I have, &c.,
HENRY CHARLES MITCHELL,
Secretary.

The Honourable the Colonial Treasurer,
Sydney, New South Wales.

Supplement to No. 22.

THE EXTENT OF FOREIGN COMPETITION WITH BRITISH MANUFACTURERS IN SUPPLYING NEW SOUTH WALES WITH IRON AND STEEL, HARDWARE, AND MACHINERY.

REPORT to HIS EXCELLENCY THE GOVERNOR.

There are very few of the import trades into New South Wales in which of late years the encroachments of foreign (mostly German and American) manufacturers have been more persistent than in those represented by iron and steel. In musical instruments, clocks and watches, and various descriptions of fancy goods, they have possibly succeeded better in withdrawing business from British manufacturers; but in many descriptions of iron and steel goods the German canvasser lays himself out to study the requirements of buyers; he finds out not only in Sydney, but up country, the classes of wares which have the most ready sale, and he at once offers to supply such goods in fac-simile and at a reduction upon the English price. Moreover, he will place any buyer's name upon articles supplied, or for that matter any marks the buyer may prefer; and there is no doubt that if an English saucepan, or other English-made article, costs 3*s.*, and the German supplies what appears to be the same, even though the wares may be inferior, for 2*s.* 6*d.*, he obtains the orders. Cheapness is now a first essential, and has especially been so since the crisis; and these foreign manufacturers have laid themselves out to meet this essential to an extent his British rival has certainly not done. In nails, wire (whether galvanised, or ungalvanised, or barbed), in sheet iron, girders, tools, sewing machines, and in lampware, the trade has already in the main passed into foreign hands, and in hoop iron, hardware and hollow-ware, bridge-work, and in agricultural and general machinery, as well as in other directions, they have obtained a considerable footing in these markets. Even in the manufacture of iron pipes, hitherto wholly in British hands, strong efforts are now being made here to underbid the home manufacturer.

That the import returns of this Colony to some extent show this progress on the part of the foreign rival to the British manufacturer, is apparent from a comparison of returns over a series of years. Take the following in evidence:—

NEW SOUTH WALES IMPORTS (as per Customs Returns)

	From United Kingdom.	From British Possessions.	From Foreign Countries.
Nails:	£	£	£
1889	15,043	2,833	10,512
1894	8,834	1,909	14,415
Wire (not galvanised):			
1889	54,459	20,648	27,440
1894	31,358	16,254	40,822
Do. (galvanised):			
1889	6,598	186	140
1894	2,935	736	6,160

There is a difficulty in extending this comparison to the trades in which foreign makers mostly compete owing to the different classifications introduced here since 1889. But in most instances similar results would be shown.

Still, such a comparison would not tell the whole truth. Much Continental-made iron is shipped from English ports, and is therefore credited to the United Kingdom, the orders being forwarded to London agents who keep the required makes in stock. Then again, almost all the trade "from British possessions" is represented by the sorting of stocks between the different Australasian ports, the goods so sorted being manufactured elsewhere. Under these circumstances the returns published of New South Wales imports are very far from affording a true guide to the country of manufacture, and we have therefore made careful inquiry amongst the importing merchants here as to the proportion and extent of the different classes of goods received from the principal manufacturing countries. This will permit of a much closer approximation to the true dimensions of the trade in British, Continental and American manufacturers' hands. The year 1894 is that selected for the inquiry; but we are assured that 1895 would in certain directions show a still larger proportion of these trades in foreign hands.

Taking, first of all, the import returns as supplied officially by the Custom-House, the following table is compiled:—

Imports of Iron, Steel, &c., into New South Wales in 1894 (according to Customs Returns).

——	From United Kingdom.	From British Possessions.	From Europe.	From United States.
	£	£	£	£
Pig iron	11,197	779	—	—
Scrap iron	3,008	215	—	—
Bars, angles, &c.	37,880	6,399	1,681	—
Sheets	9,658	2,198	14,238	—
Bolts, spikes, screws, &c.	14,896	2,632	125	1,316
Girders	771	200	2,363	—
Nails	8,834	1,909	12,628	1,787
Hoops	18,013	66	464	—
Pipes	50,369	3,896	—	—
Castings (other)	8,784	3,489	159	—
Chains	2,906	211	4	—
Tanks	10,991	1,912	—	—
Rivets	2,018	314	—	—
Anchors	616	—	—	—
Wire (not galvanised)	31,358	16,254	49,822	—
Do. (galvanised)	722	204	1,850	113
Do. (barbed)	2,213	532	974	3,223
Galvanised netting	3,615	8,566	—	90
Do. sheets and bars	180,946	18,700	2,465	—
Do. other	2,283	1,732	9	116
Wrought iron	516	948	—	—
Safes	2,761	845	—	—
Bedsteads	11,733	362	—	—
Stair material	—	—	3,312	—
Telegraphic	562	—	—	—
Hardware	94,505	33,958	7,904	21,967
Hollow-ware	12,075	437	7,547	14
Tools	30,897	14,852	2,919	36,879
Lampware	5,974	1,170	849	4,274
Machinery (agricultural)	15,018	18,478	—	1,877
Do. (sewing machines)	2,530	2,638	2,961	21,120
Do. (miscellaneous)	72,396	55,286	4,167	12,717
Cutlery	26,201	2,232	2,262	80
	675,746	201,414	118,703	105,573

A few of these entries we have been enabled to trace completely. For instance, the small item of telegraphic iron, entered as coming from the United Kingdom, was manufactured wholly in Germany and sent to England for shipment. There are a considerable number of entries in the foregoing in connection with which it may at once be said that the British manufacturers as yet supply the whole of them; although this should not be taken to imply immunity for the future, as there are foreign agents even now in Sydney endeavouring to secure participation in certain lines. English manufacturers' agents candidly admit that the metal imports of Australia are steadily, if quietly, drifting in larger proportions to other countries, especially to Germany. In bulk, too, these foreign-made goods make a still larger display than in value, as they are almost wholly cheap wares.

NEW SOUTH WALES.

A careful inquiry in each case amongst the importing houses permits of the following comparison being formed between the published returns for 1894, and the supplies derived from the actual countries of manufacture :—

IMPORTS of IRON and STEEL, &c.

	As in the foregoing Return.	Approximate Countries of Manufacture.
	£	£
United Kingdom	675,746	699,700
British Possessions (Victoria principally)	201,414	5,000
Europe (mainly Germany)	118,703	257,300
United States	105,573	139,400
	1,101,436	1,101,400

The adjustments indicated in the second column are made as follows :—

PROBABLE contribution of IMPORTS, as in the PRECEDING TABLE, from BRITISH and FOREIGN MANUFACTURING COUNTRIES.

	From United Kingdom.	From Europe.	From United States.
	£	£	£
Pig iron	12,000	—	—
Scrap iron	3,200	—	—
Bars, angles, &c.	39,000	7,000	—
Sheets	7,700	18,400	—
Bolts, spikes, screws, &c.	14,400	1,400	2,600
Girders	800	2,500	—
Nails	4,000	18,500	2,500
Hoops	11,800	6,700	—
Pipes	54,000	—	—
Castings (other)	11,300	1,200	—
Chains	3,100	—	—
Tanks	12,900	—	—
Rivets	2,300	—	—
Anchors	600	—	—
Wire (not galvanised)	10,000	87,400	—
Do. (galvanised)	700	2,100	100
Do. (barbed)	1,700	2,000	3,200
Galvanised netting	12,200	—	100
Do. sheets and bars	190,300	11,800	—
Do. (other)	4,000	—	100
Wrought iron	1,400	—	—
Safes	3,600	—	—
Bedsteads	12,100	—	—
Stair material	—	3,300	—
Telegraphic	—	600	—
Hardware	91,400	42,000	25,000
Hollow-ware	12,000	7,500	500
Tools	35,500	5,000	45,000
Lampware	3,600	2,400	6,300
*Machinery (agricultural)	23,500	—	10,500
Do. (sewing machines)	2,700	3,200	23,400
* Do. (miscellaneous)	95,000	26,500	20,000
Cutlery	22,900	7,800	100
	699,700	257,300	139,400

* In addition, about 5,000*l.* machinery manufactured in Victoria.

A number of special features may be noted in connection with this table.

Bars, Angles, and Sheets.—It is generally admitted that English manufacturers are holding their own in the supply of bar iron ; but the supply of plates and sheets is distinctly tending towards Germany upon the question of price.

Bolts, Spikes, Screws, &c.—Both the Continent and America have obtained a footing. It is also asserted that Japan is likely to enter into competition in the supply of small goods.

Girders.—Continental manufacturers have taken the principal share of the trade in rolled girders and joists, and the convenient weights and lengths, combined with

comparatively low prices, have caused their consignments to be much sought after for local constructive purposes.

Nails.—Germany and America have flooded the Colonies with nails of almost every kind. A quantity of American and other nails are sent to London and transhipped apparently as English goods. Consumers still express a preference for horse nails of English make, but this is about the only line which has not been annexed by the foreigner. A number of American and German brands are putting in their appearance, and there is a doubt whether the entire nail trade will not in the future be annexed by those countries. The Germans have a very strong hold upon the wire nail trade, and these are undoubtedly the most useful and popular in this market. Trade is steadily expanding with Germany in all classes of goods made from wire, both black and galvanised.

Pipes.—So far the trade has almost exclusively been in British hands; but at this time Germans have entered bids for the local trade at rates which promise to demoralise the market for English goods. From Sydney, too, we supply large contracts for Queensland, and the business is sufficiently important to make German manufacturers keen. The recent drought has given a strong impetus to the demand, and in galvanised pipes Germany is now pressing for business in tubes threaded to the English screw pitch.

Chains, Tanks, Rivets, and Anchors.—The supply of these articles is in English hands but since the depression the trade has been small.

Hoops.—The demand for black hoops has been so considerable for baling and general purposes, and the supply of German hoops so cheap that nearly the whole of our bulk trade has gone to the Continent. In galvanised hoops there is a difference of 3*l.* to 4*l.* a ton in laid-down cost in favour of the German article. English hoops are only used for a few branches of manufacture, chiefly in the sheet metal and tinware trades, where the demand is necessarily small.

Wire.—This is one of the most important items in the schedule of manufactured iron. The Customs returns do not indicate the extent to which the trade has passed into German hands. So great has been the transfer of black fencing wire to foreign factories that English manufacturers have endeavoured to supply "rolled" instead of "annealed steel drawn," and the difference in quality is so marked that it has called forth speedy condemnation, and there would be a difficulty in removing the prejudice in favour of Continental wire. Out of the 31,000*l.* of wire set down by the Custom House as coming from Great Britain probably not 20 per cent. was of English make. Much of the black wire imported for the manufacture of wire netting is sent across from Antwerp to London for transhipment. The same remark applies to galvanised wire as to galvanised hoops, and consequently at the much cheaper figure Germany secures the business. As regards barbed wire, the Americans have now introduced an article so superior that it commands the first place, and current quotations always refer to it. Indeed, the imports from America increased considerably in 1895. English barbed wire has now ceased to be quoted here.

Galvanized Sheets, Bars, and Nettings.—These very important imports still reach us mainly from the mother country, although the value of the trade is attracting attention in Germany, and efforts are likely to be made to secure a portion.

Bedsteads, Safes, &c.—These trades remain in English hands.

Hardware Tools, &c.—A good deal of the trade in cheap ironmongery and general hardware, as well as horseshoes and kindred lines has gone to the Continent of late, while that with America has been very considerable. The variety of goods classed under this heading affords a selection of articles which has rendered trade piracy easy, and notwithstanding the manufacture of a large number of lines by English manufacturers, Continental manufacturers have swelled the list of exports from London by stamping their wares with the names of English manufacturing centres, and these goods being transhipped through London for the Colonies makes it appear as if the proportion of English exports under this heading is larger than is really the case. An interesting feature has asserted itself in connection with the manufacture and export of tools of trade from foreign countries for this port. Until quite recently America was rapidly gaining ground in the supply of tools of trade. Germany appears to have turned the tables on the Western world, however, by closely imitating American goods, which are already finding favour in this Colony, so that exports from the Continent seem likely to shortly show larger proportions. America and Germany between them have also severely undermined the trade of British manufacturers in the matter of domestic ironmongery and utensils.

Hollow-ware.—So far as regards the heavier lines of castware, foreign trade has not seriously interfered with that of the United Kingdom, but in the items of enamel-ware

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and agate-ware Germany and America have made a strong set at the Colonies, and the volume of business in these lines is finding rapid expansion. Light enamelled goods are so admirably adapted to the requirements of the Colonies, that it is no wonder they should have found much favour, and in this particular at least foreign manufacturers may almost be regarded as public benefactors in having provided a class of goods so well suited to our climate and surroundings. There is every reason to believe that the trade in pressed and enamelled ware will assume large proportions.

Machinery.—In the item of agricultural machinery about 2,000*l.* worth must be credited to Victoria, and probably 3,000*l.* in the way of boilers and gold-mining machinery. America has furnished a large variety of implements, which are doing excellent service among those engaged in rural pursuits, and both Germany and America are striving to open out in the matter of light machinery for wood and metal working, and that offering has the advantages of being portable and inexpensive as well as effective enough to make it a dangerous competitor against British goods. These items are too diversified in character to enumerate in detail, but it is sufficient to say that both German and American manufacturers are straining every possible point to monopolise our trade, and their methods are so ingenious that they are rewarded with a fair amount of success.

Cutlery.—About 20 per cent. of the imports come from Germany. They are all of the very cheap description, and therefore the small value represents a comparatively large quantity. On the other hand, a large proportion of the English-made cutlery is high-priced, and in that description there is no material rivalry. Still, the German manufacturer has no intention of resting where he is in this market, and as there is no need to brand his goods as German, the purchaser here may readily be deceived.

SUMMARY.

The result of this inquiry is that for the year 1894 it may generally be estimated that out of a total import trade in these metals and metal wares, amounting to 1,101,000*l.*—

63·5	per cent.	is supplied from	Great Britain.
23·4	„	„	Germany.
12·7	„	„	United States.
0·4	„	„	Victoria.
100·0			

and that the supply of foreign manufactures is upon the increase, most of all from Germany, German agents being prepared to supply small orders to up-country dealers with their own names upon them at a rebate on English prices.

In forwarding to you the foregoing comments upon the metal and machinery imports of New South Wales we desire to lay special stress upon the fact that the import trades of these Colonies are to a very important extent financed from the United Kingdom, and that British-owned vessels carry the bulk of the goods received for consumption. These are admittedly great advantages to the mother country. Yet they have not been powerful enough to stay, though they still check, the encroachments of foreign (principally German and American) competition; and already foreign countries, by heavy subsidies to their shipping lines, are seeking to compete in the carrying trade, and do so to the manifest advantage of their manufacturers.

If it should ever came to pass, as it might do, that Germany, or France, or possibly the United States, entered into serious competition in financing our import markets they would strike a yet more serious blow at the supremacy of the British manufacturer. At the present time, it rests with the British manufacturer himself whether he will win back a portion of the ground recently lost by turning his attention to the output of those cheap, handy, and often serviceable goods upon which his rivals are building up their connections with these markets, and have done so all the more in these times of depression when cheapness is more than ever an essential.

We are, &c.

R. L. NASH, Financial Editor,
Sydney "Daily Telegraph."

W. G. RENDALL, Commercial Editor,
Sydney "Daily Telegraph."

VICTORIA.

No. 23.

LORD BRASSEY to Mr. CHAMBERLAIN.

(Received July 27, 1896.)

Government House, Melbourne,
June 23, 1896.

Sir,

With reference to your despatch of the 28th November with regard to the importance of securing as large a share as possible of the mutual trade between the United Kingdom and the Colonies for British producers and manufacturers, whether located in the Colonies or in the United Kingdom, I have the honour to transmit for your information a copy of a memorandum by the Honourable the Premier, enclosing a return which has been specially prepared by the Minister of Customs, affording as full information as possible upon the subject, together with a return prepared by the Geelong Chamber of Commerce and a letter addressed by that body to the Customs authorities.

I have, &c.,
BRASSEY.

Enclosure in No. 23.

Memorandum for His Excellency the Governor.

Premier's Department, Melbourne, June 15, 1896.

The Premier presents his duty to your Excellency and begs to refer to the despatches from the Right Honourable the Secretary of State for the Colonies of the 28th November and 31st December 1895, on the subject of trade, both of which were returned to your Excellency on the 6th March last, with an intimation that steps were being taken to comply with the wishes of the Colonial Office as regards the matters referred to in those despatches.

Mr. Turner now begs to forward herewith a memorandum on the subject, which has been prepared by Mr. F. H. Bruford, of the Department of Trade and Customs, under the direction of the Minister of that Department; and the Premier asks that your Excellency will be pleased to transmit that memorandum to Mr. Chamberlain.

The collection of samples mentioned in the document is being forwarded per Tate's Express to the Secretary of the London Chamber of Commerce, in cases and packages, marked (L.C.C), as desired by the Colonial Office. These samples need not be returned, but are presented unreservedly to the Imperial Government.

The Premier also forwards herewith, for transmission to the Colonial Office, a return prepared by the Geelong Chamber of Commerce, and a letter addressed to the Customs authorities. While this return is of some value, as generally confirming the information given in the Government memorandum, it should be borne in mind that Geelong, which is the second port of the Colony and an important centre, has only a small fraction of the direct importing trade, which is centred in Melbourne, and that the information supplied relates only to Geelong.

George Turner,
Premier.

Department of Trade and Customs,
Melbourne, June 8, 1896.

The return asked for by the Right Honourable the Secretary of State for the Colonies, in his despatch of the 28th November 1885, is attached hereunto.

This return without some explanation would be not only useless for the purpose for which it is intended but also misleading to anyone unacquainted with the trade of the colony of Victoria.

In the despatch quoted above, Mr. Chamberlain expresses his desire to ascertain the value of the goods enumerated therein "imported from any foreign country," but, recognising that some foreign goods pass through Great Britain, he has requested that where this is a matter of common knowledge they should be included in the return.

It is a matter of common knowledge that by far the greater part of the foreign goods shipped to Victoria are received from British ports, and are entered in the statistical returns of the colony as from Great Britain; the statistical returns do not pretend to show the country of origin, and the return of direct importations from each country does not give even approximately the trade in the produce of that country.

According to the return the percentage of importations from foreign ports on the total trade on those goods listed in the despatch was as follows:—

	Per Cent.
In 1884	7·86
In 1889	11·17
In 1894	12·58

An estimate, made after careful inquiry amongst the importers, and by one who has a knowledge of the goods passing through the Custom House, shows that the foreign trade in the same goods in 1894 was 33·06 per cent. of the total. Of this only 12·58 per cent. was received direct from foreign countries. This estimate applies to the articles included in the return only, and it must not be mistaken for a correct statement of the percentage of the total foreign trade of Victoria. Tobacco, timber, wine, and many other goods which are not British products have been omitted, as also have all goods of which the foreign importations do not amount to 5 per cent. of the total importations.

It is therefore evident that the return is no indication of the actual importation of foreign goods, and that any argument founded upon the apparent increases would be fallacious; the return is, in fact, only valuable as a correct statement of the trade routes by which goods arrive in Victoria and of the total quantities imported.

The failure of the Victorian statistics to present the importations of British and foreign manufactures separately is owing to the course of trade. The wholesale importers here buy the greater part of their foreign goods in London. Their buyers have their head-quarters there, and it is in Great Britain, rather than in Victoria, that the competition between British and foreign sellers takes place. The Victorian merchants do not always specify in their orders either British or foreign goods; they leave it to the discretion of their buyers in London to purchase whichever may be cheapest at the time; and, further, they do not in all instances know whether the goods they import are of British or foreign manufacture. London is the emporium of trade for foreign as well as for British goods, and the catalogues of British factors, and of not a few manufacturers, contain quotations for quantities of foreign articles. Foreign trade is in fact fostered in Great Britain.

Under these circumstances goods, before their arrival here, lose their identity, and it would be very difficult, if not impossible, to trace them to their place of origin. Further, even when such goods are purchased direct from continental merchants they are commonly sent to England for shipment, in order that advantage may be taken of the cheap freights by British sailing ships, and for other reasons.

It is not only continental goods which come from Great Britain; American goods are sent by way of London, to take advantage of the freight facilities offered by the regular trade lines of vessels, and they are also purchased in England for this market.

There are also other factors which tend to increase the total of British trade, as shown in the statistics. The whole of the intercolonial trade ranks as British, and much of this trade is simply the sending backwards and forwards of merchandise to suit market requirements. British goods shipped to Sydney, and thence to Melbourne, would appear twice as British trade to Australia—once in New South Wales and once in Victoria. Foreign goods shipped by the same route would appear in New South Wales as foreign, and in Victoria as British. This interchange is carried on to a considerable extent; American, Japanese, and Chinese goods commonly arrive by way of the neighbouring colonies, thus being included in the statistics of this colony as British.

There is a small contra reduction. A few Canadian goods come through the United States, and are ranked as foreign.

With a view of increasing, as far as possible, the small comparative value of the actual figures of the return, an estimate has been made of the foreign trade of Victoria for 1894 in each separate item enumerated in Mr. Secretary Chamberlain's despatch. It is regretted that a similar estimate cannot now be made for any previous years, but when the foreign trade in any article has been increasing or decreasing it is so stated in the return under the proper heading.

Whether foreign trade, in proportion to the total commerce, has increased or decreased since 1884 or 1889 cannot be definitely stated, but it is the opinion of a majority of those best able to judge that there is no greater proportion of foreign trade transacted in Victoria than there was in 1884. In fabrics for women's wear, and some other articles

the continental countries have improved their position; in hardware and heavy fabrics the British trade has advanced, whilst in wooden goods the United States now, as heretofore, maintains supremacy in the markets of Victoria. Lately the trade in iron and steel has been threatened by the competition of Germany.

The selection of the years 1889 and 1894 for comparison has rendered the return to some extent valueless as an indication of the increase or decrease of foreign trade in this colony. In the year 1889 Victoria was at the climax of a commercial and speculating mania, and the imports were larger than at any previous period; in the year 1894, on the other hand, the colony was at the lowest depths of a time of depression, and the imports had fallen to a minimum. The total value of the goods included in the return was—

	£
In 1889	9,379,679
In 1894	4,111,459

Whether British and foreign trade were affected to an equal extent is doubtful. On the one hand, the importation of the many articles which are not necessaries of life—such as pianos, pictures, fancy goods, which are foreign manufactures—almost entirely ceased, whilst on the other hand the diminished incomes of the masses of the people led to the use of the cheaper Continental manufactures in place of the better English goods.

There are some remarks which apply generally to large classes of goods imported which it will be more convenient to place here than to repeat under each separate heading. These remarks deal with—

1. Freights and subsidies to shipping.
2. Terms of credit.
3. Exchange.
4. Marking of goods.
5. Packing.
6. Methods of transacting business.
7. Price.
8. Cataloguing and advertising.

1. Freights and Subsidies to Shipping.

The following lines of steamers trading to Victoria are subsidized :—

The Peninsular and Oriental Steam Navigation Company's line and the Orient Company's line each receive a mail subsidy of 85,000*l.* per year from Great Britain and the Colonies.

The Nord Deutscher Lloyd Imperial German line from Bremen to Melbourne, *viâ* Southampton, Genoa, Naples, Suez and Colombo, receives a subsidy of 200,000*l.* per year from the German Government. This is called a mail subsidy, but from its magnitude it may fairly be looked upon as a bonus to foster trade or a naval retainer. This line is doing a large and increasing business.

The Messageries Maritimes line from Marseilles to Melbourne, *viâ* Colombo, Suez, Mahé, &c., receives a so-called mail subsidy of 120,000*l.* per year from the French Government, which sum may also be looked upon to some extent as a trade bonus or a naval retainer.

An American line from San Francisco to New Zealand, joining with Victorian lines, also receives some small mail subsidies

These are the known subsidies, but it is possible that further assistance unknown to this Government is given to some of the lines trading to Victoria.

In addition to these subsidized lines there are a line of German steamers and several British lines of cargo boats running from Europe to Melbourne.

The subsidies given to the German and French lines undoubtedly assist foreign trade. Without the subsidies, steamships of the class which form these lines could not be run to Germany or France at a profit, and the subsidies enable the vessels to carry goods at a lower rate of freight than they could otherwise do; but it must be remembered that British merchants probably participate in the benefits of the lower freights caused by the subsidies. They can ship goods by the German line at a cheaper rate than if that line were not subsidized. The German and French lines carry quantities of British goods to Victoria.

The following is a comparison of the freight by the different lines on drapery, as paid by a large firm of importers:—

1. From London, *vid* Marseilles to Melbourne, by the Messagerics Maritimes subsidized French line, 35*s*. per ton for all goods.
2. From London to Melbourne by the Orient mail line (subsidized), 40*s*. per ton for heavy goods, 60*s*. per ton for light goods.
3. From London to Melbourne by the Peninsular and Oriental Steam Navigation Company's line (subsidized), 45*s*. per ton for heavy goods, 65*s*. per ton for light goods.
4. From London to Melbourne by the Aberdeen line, 30*s*. per ton for heavy goods, 40*s*. per ton for light goods.
5. From London to Melbourne by the Port line, 35*s*. per ton for heavy goods, 42*s*. 6*d*. per ton for light goods.
6. From London to Melbourne by Lund's line, 30*s*. per ton for heavy goods, 40*s*. per ton for light goods.
7. From Bremen to Melbourne by the Nord Deutscher Lloyd's Imperial Service (subsidized), 35*s*. per ton.

Taking into consideration the duration and regularity of the voyages, the subsidized German and French lines may be considered to be the cheapest, especially as the freight by the latter includes carriage from London to Marseilles—the port of departure.

The rates quoted are for the stock of a drapery warehouse, but may be considered as applicable to all valuable goods requiring quick despatch.

The freights from Great Britain and Europe vary so greatly, however, with the seasons of the year that it is almost impossible to give anything like a fair average. When the vessels required to take away our produce are sailing from England, Germany, or France to load in Victoria, freights are very low, and for dead weight or bulky goods are sometimes merely nominal. Heavy materials have been brought both from Germany and Great Britain for as little as 6*s*. per ton in sailing vessels, and at a very slightly greater freight in steamships. On the other hand, when there is little return cargo, freights on the same class of goods are as high as 30*s*. per ton in sailing ships, and considerably more in steamers.

The quantity of heavy and bulky goods coming from Germany to Victoria is limited, and it has been freely stated here that if Great Britain could secure a monopoly of the trade in a few descriptions of such goods the steamers from Germany could only be kept running by the payment of very much larger subsidies. The dead weight and filling-up cargo from Germany, upon which the German steamships depend, consists mainly of fencing wire, cement, salt, sewing machines, and pianos.

The freights from the Continent to Victoria and from Great Britain to Victoria by steamships are about equal, but Great Britain has an advantage not possessed by her competitors of being able to send goods by sailing ships at cheap rates. The cargo suitable for sailing ships, with the exception of Baltic timber, is not sufficient in any European country to keep a regular fleet of sailing ships employed, whilst the British trade is sufficient to maintain a large number of ships bringing goods at little more than half the freight required by the steamers,

The United States are not so well situated as Great Britain in regard to freights to Victoria. The direct trade with the East Coast is by sailing ships, and the rate of freight is from 20*s*. to 27*s*. per ton—an average of 4*s*. or 5*s*. more than from Great Britain. A considerable quantity of goods is sent to England for transhipment to Victoria by British steamers to avoid the long and uncertain voyages of the sailing ships from America.

2. Terms of Credit.

The competition between British and foreign commerce in Victoria is very little affected by the terms of credit. As a rule a buyer is able to dictate his own terms to foreigners, and very often to arrange them satisfactorily with British houses. Generally speaking, there is not much difference between the length of credit given by foreign and British firms, but in special lines it is sometimes the custom for British houses to give the longer credit and sometimes the reverse.

Notwithstanding this similarity of terms the custom of British and foreign houses in dealing with their customers differs greatly. A British manufacturer very often acts by a fixed rule in granting credit. If the customer be unknown to him he sends his bills of lading to a bank to be delivered on payment of cash only, and he makes few concessions from his fixed rules to any class of buyers. The Germans, and to some extent the French, manufacturers pursue an exactly opposite course. They are ready to offer

special terms to secure business. If a buyer be unknown to them they will take the trouble to make inquiries respecting his financial standing, instead of requiring cash payment as a matter of course.

As a rule, more, trust is given by foreigners than by the British, and this method of doing business must necessarily secure to them some trade which might otherwise be held by British manufacturers.

It is not amongst the wealthy firms that any advantage is gained in this manner by foreigners, but the foreign agent selling to the small retail shops must, by granting special easy terms, be able to largely increase his trade.

3. EXCHANGE.

A general opinion is held by Victorian merchants that exchange has no effect whatever on the price of foreign, as compared with British, goods. Nearly all payments, whether to foreign or British firms, are made by bills payable in, or by drafts on, London, and there is therefore no direct advantage or disadvantage to a Victorian importer in dealing with foreign countries.

Whether the foreign exporter derives any advantage from the receipt of documents negotiable in London instead of in his own country is a difficult question to answer here, depending, as it does, upon the rate of exchange ruling between his country and Great Britain. It would seem to be probable that he does receive some benefit, otherwise he would prefer payment in his own country. In some instances it is known that bills and drafts on London are at a premium in Continental countries and the United States. Whether this is a general rule, and whether the amount of premium is a material advantage to the possessors of such bills and drafts, can be better ascertained in London than here. The benefit must, under any circumstances, be a very small factor in determining the price of goods, but it would extend over nearly all foreign merchandise imported.

4. MARKING OF GOODS.

The enactment of the Merchandise Marks Act by Great Britain and its adoption by this colony has, to a very great extent, stopped the sale in Victoria of foreign goods as British. The effect of the Statute is held by Victorian merchants to have been wholly beneficial to British trade. (The Act which was formerly known as the Merchandise Marks Act is now Part II. of the Victorian Trade Marks Act, 1890.)

The Act, however, is evaded in several ways, and in spite of the law some foreign goods are sold in Victoria as British. Many articles partly made in Germany, France, and Belgium are sent over to Great Britain, where they are finished and branded with the name of a British firm. This is known to be the case in regard to brass musical instruments, and to guns and pistols. Probably the custom prevails to a considerable extent, but it is too difficult of detection to enable any definite statement to be made in regard to it. The guns and pistols partly made in Germany and Belgium are stamped with the British test mark. The silver mountings of purses, ladies' bags, &c., made in Germany sometimes bear the British silversmiths' hall mark, which is taken by the public as an indication that the goods are of British manufacture.

A still more important evasion of the Trade Marks Statute takes place in regard to small boxed or carded goods. There is evidence here that such articles as pocket knives are sent to Great Britain, probably correctly marked on the box or card—"Made in Germany," but in Great Britain they are re-boxed or re-carded and marked with a British firm's name. These articles cannot legally be imported under the Victorian Trade Marks Act, but it will be at once seen how difficult it is to detect or prove a fraud of this description. It is obviously much easier to administer the Trade Marks Act in regard to goods coming direct from foreign countries than it is in regard to foreign goods arriving from Great Britain. These evasions of the Trade Marks Act are distinctly detrimental to British trade, as the words "Made in Germany" are not in this colony any recommendation; whilst an indication that goods are made in Great Britain is generally looked upon as a guarantee of honest workmanship.

In reference to this subject it should be remembered that neither in Great Britain nor in Victoria is it requisite that the country of origin should be stated on goods. This obligation only applies when the goods bear on them marks which would otherwise mislead.

The Trade Marks Act of Victoria is in its main provisions similar to that of Great Britain, and it is administered as strictly as possible, but a difficulty exists in this matter which it is necessary to state here. Some of the Australian colonies have not adopted

similar Acts, and this colony experiences a distinct disadvantage by carrying out the law. When the importation of wrongly marked goods is stopped in Victoria, the trade in such goods is transferred to a neighbouring colony which becomes the distributing centre, and the commerce is lost to Victoria. If the same law applied to all Australia each colony would enjoy its legitimate share of the advantages of such commerce, and British manufacturers would receive the advantages derivable from their renown.

5. PACKING.

British exporters to Victoria generally attain the one object they appear to aim at in packing, viz., the transmission of their goods to their destination without damage. The cases of such goods as are cased are superior to Continental ones, which are often too large and too weak, but in many other respects there is need for other methods than those followed.

Firstly, sufficient attention is not given to the necessity of packing in a small compass. For transmission to a distant colony this is important, because the smaller the cubic measurement in which goods can be packed the less is the freight, the storage, the cartage, the wharfage rates, and sometimes the duty. American goods, and sometimes German goods, are more closely packed than British goods without in any way increasing the risk of breakage or damage. Whenever a duty by measurement has been placed on any article in this colony it has been found that the Americans and sometimes the Germans have proved themselves able to place a greater quantity in a cubic foot than the British. The trade in lamp glasses, bottles, and some other items has been seriously affected by the difference in the closeness of the packing.

A feature of United States packing is the more general practice of making up articles into trade packages—that is, into packages which can be bought and sold in the cases in which they are imported. Clocks, lamps, and many such articles are sent in cases of unvarying size, and containing a suitable number of articles for sale to retail shopkeepers, when similar goods from the Continent or from Great Britain would be sent in larger cases of irregular size, designed for no other purpose than to convey the goods to Melbourne.

Further, the United States use largely specially prepared pitch-paper for lining cases, where the British use metal. The experience in this colony is that the pitch-paper is as effectual in preserving goods as metal, and that it is lighter and more convenient.

In the boxing or "get up" of small goods the United States manufacturers excel. They use cardboard boxes in numerous instances where the British pack in brown paper parcels, and the United States practice is held to be preferable, for the reason that the box is suitable for placing on the shelves of a shop. As regards the goods which are packed in boxes both in Great Britain and the United States, the boxing is nearly always better done in the latter country, the boxes being stronger and more sightly. British goods can commonly be picked out in the stock of a hardware store by the greater number of broken boxes. The excellence of the Manilla paper and cardboard boxes used in the United States has been a considerable factor in advancing American trade.

6. METHODS OF TRANSACTING BUSINESS.

Victorian merchants say that "the Germans bring their goods to the buyers whilst the British wait for the buyers to come to them," and undoubtedly this is the experience in this colony. Large numbers of German manufacturers are represented here by travelling agents who display the greatest energy in transacting business; an energy which amounts to pertinacity. These agents live on less than the British, and they are not put to the expense of a large establishment or warehouse. Their only requirement for business is a sample room. They sell direct to retailers, and are content to take small orders, and to offer special terms for the purpose of making sales. As many houses buy in London only, the travelling agents make it their business to study the requirements of these houses in Victoria, and find out the buyers in London in order that samples may be submitted there. They are constantly bringing forward close imitations of the saleable goods in the market a little lower in quality and in price than the articles copied. In all this their methods are in direct contrast to those of the British. There are travelling agents from Great Britain, the United States, and from other countries, but they do not equal those from Germany in energy or in pertinacity.

The foreign countries which trade largely in Victoria have established many resident agents, who ably represent individual manufacturers. This is not the case to so great an extent with the British. Many British manufacturers whose goods are in common

demand here are not represented at all, whilst others give their agencies to Victorian merchants who have many other interests, sometimes, perhaps, conflicting with those of their principals.

The effect of these differences in the method of establishing agencies is that many foreign goods are in Victoria on consignment by the manufacturers, whilst British goods are mainly those which have been bought from the manufacturers in Great Britain, and which it is no one's interest to specially push forward. A warehouseman in the colony with British and foreign goods for sale gains nothing by selling one instead of the other. This must be prejudicial to British industry.

An opinion is almost universally held by Victorian buyers that British manufacturers are "too conservative;" that they will not vary their patterns or styles, their manner of packing, their terms, or make any concessions in their inflexible rules to suit even their best customers. They make for the British market only, and if the goods are not suitable to Victoria the supply must be sought elsewhere. Instances of the loss to British trade by the failure of the British manufacturers to realise the requirements of this market have been met with frequently in making the necessary inquiries for the attached return, amongst which the following may be quoted as examples of many more:—The British lost the trade of Victoria in tacks by failing to pack them in card-board boxes instead of paper packages. They were, to a large extent, cut out in the market for cartridges by declining to pack them in packages of 25 instead of 100. Both these defects have now been remedied, but the trade has to be regained. In very many cases the shape of British articles is unsuitable to Victoria; the hammer, for instance, is not, in the opinion of Victorian carpenters, nearly so well shaped as the American hammer, but the British pattern seems inalterable; the same may be said of many tools and articles in common use.

With regard to tools and implements, the well-known talent of the United States manufacturers in producing the best shapes for utility gives them a strong position in a market the requirements of which are somewhat similar to those of America. The British do not attempt to assail that position, but the Germans copy American inventions, and compete with the Americans in this market whenever the patent laws do not prevent it. Speaking very generally, it may be said that foreign nations find it worth their while to vary their manufactures to suit the requirements of Victoria and other colonies similarly situated, whilst the British manufacturers keep to a beaten track. They are said to disregard suggestions for alterations or improvements, whilst foreigners are more willing to comply with the wishes of even comparatively small buyers.

Another great divergence in the methods of transacting business pursued by the British and foreign nations, consists in the different amount of assistance in certain directions given by the Governments of the one and of the other. All foreign nations which trade with the colony have consulates in Melbourne, and the consuls are to a great extent trade agents. Their principal business is to foster trade, and they keep their Governments well informed in all matters by which this end can be attained. This information is disseminated in their respective countries, and it must be of great value both to manufacturers and Governments. The consuls, or at least some of them, can be applied to by persons seeking to extend their business, and many of them are known to supply information direct to applicants of their own nationality. The British have no corresponding institution. Their governors or administrators are not always business men, and they are not in a position to send such minute information to the Government or to private inquirers as are foreign consuls; whilst in many foreign countries, where the merely commercial interests are not nearly so large as they are here, the British nation has a consular representative, who makes the trade of the place a special study.

The result of this difference of practice is two-fold: first, the British Government is not so well informed of the trade of Victoria as it is of that of foreign countries; and, second, foreign nations are better acquainted with the trade of Victoria than is the British nation. As has been shown before, the bare statistics sent to the British Government are of limited value to traders and without explanation are misleading. What is necessary is more practical and exact regular commercial news in regard to such matters as price, demand, freight and fashion, and this can only be obtained by the establishment of a business agency.

7. PRICE.

A great deal of difficulty is experienced in this colony in complying with the directions in regard to price contained in the despatch to which this is a reply, and a certain amount of reserve must be observed in accepting the prices given as exactly those at

which British manufacturers could sell their goods in Victoria. In this colony there is no wholesale price for many goods in the sense in which a British manufacturer would understand the term, owing to the fact that the conditions of business are entirely different. Firstly, a large number of retail houses import direct from Great Britain and from foreign countries, buying often direct from manufacturers. With this competition existing, there can scarcely be an established wholesale price. Secondly, a large number of good houses are both wholesale and retail. The hardware, stationery, and many other trades are principally in the hands of firms and companies who sell both wholesale and retail. In these trades, the largest firms in Melbourne will supply any quantities down to pennyworths. Under these circumstances it will easily be understood that price lists are not published, and that each firm sells at a variety of prices, according to the size of orders, the standing of customers, and other conditions. There is in fact no standard price as in Great Britain, and those given in the return are, except where the contrary is stated, the prices at which the importers sell to shopkeepers, it being always remembered that the largest shopkeepers import some or all of their own goods.

Prices also vary much more in a small market like that of Victoria than in a large one like that of Great Britain. With a limited and irregular demand, and situated very far from the seat of supply, the market of Victoria is liable to gluts and scarcities. This is more particularly the case with regard to heavy goods. A deficient supply at a time when ships to carry wool are not leaving Europe in the usual numbers sometimes leads to great increases of price, and the averages which have been attempted must not be considered as a constant or even generally constant statement of value. In goods subject to demand caused by seasons or by fashion great fluctuations in price take place very rapidly. There is little outlet here for surplus stock, and material which goes out of fashion becomes unsaleable; further, dress stuffs and many other such goods are commonly worth less than half as much at the end of a season as when new in market.

A considerable portion of the large transactions in Victoria are subject to special terms, the particulars of which the persons interested are unwilling to divulge, and which cannot well be demanded from them. Special and secret terms are so much a feature of business that wholesale prices are in some instances unobtainable, and it has been occasionally necessary to give the prices at which goods can be landed in Victoria instead of the rates at which they are sold. It is thought that this information will be almost as valuable to British manufacturers as that sought by Mr. Chamberlain.

8. Cataloguing and Advertising.

It has before been stated that very few British manufacturers have special agents in Victoria, and, therefore, it will be easily understood that only a limited number appeal directly to the public by advertisement. The local importers of British goods—no doubt partly at the expense of manufacturers—advertise their stock to a considerable extent, and in this way they are placed before the public, but only those goods which are already for sale in the market and out of the hands of the makers are advertised in this way. Many importers here are of opinion that there are large quantities of goods made in Great Britain which would be saleable here if they were known, and that sufficient effort is not made to display them. This opinion seems to be justified by the results obtained by the few British makers who have established special agents in Victoria and have advertised largely. Some British manufacturers of soap, plated ware, and a few other articles have succeeded by advertising in securing the market for their wares, and these few have done much to conserve to Great Britain the trade in their products. It is the energy of a British firm which has to a great extent stopped the importation of American and other plated ware, and foreign toilet soaps would undoubtedly have obtained a secure footing but for the efforts of a British manufacturer. There are some articles, such as patent medicines, which owe their sale almost entirely to advertising, and in these the British have a very large portion of the trade, owing to their extensive expenditure in bringing their goods before the public. In these and some other goods merit is quite a secondary consideration in securing trade.

Foreign goods are much more largely advertised by the manufacturers than by local dealers, and this description of advertising is undoubtedly the best for trade. An appeal to the public to buy a certain make of articles generally results in retail dealers being compelled to keep that make in stock, whereas an advertisement by a retailer that he has such goods for sale is far less wide-reaching. Foreign manufacturers undoubtedly advertise more largely in their own interests than do the British.

An effort has been made to ascertain the extent of British as compared with foreign advertising, but no definite decision on the point can be arrived at. In the warehouse

of a stationer about 20 per cent. of whose stock was foreign, only about 50 per cent. of the catalogues and printed advertising matter received was British. A similar proportion was found to be maintained in many other businesses. Foreigners advertise in this particular manner more extensively than do the British, but it is by no means clear that their goods are on the whole more largely advertised in proportion to the business done.

It must not be considered that more extensive advertising is advocated. On the other hand, too extensive advertising is directly disadvantageous to the consumer, who eventually has to pay all expenses incurred in fostering trade. Already the tax on this community is enormous as may be shown by a few instances. Sewing machines which cost 3*l.* to make are sold to the public retail at about four times that price, the difference being nearly all eaten up in the cost of advertising and forcing sales by the expensive time-payment system. Reapers and binders are for the same reason sold at more than double their value, and the same may be said of cycles, pianos, soap, and numerous other goods. The cost of advertising patent medicines in this market is very much greater than the intrinsic worth of the goods advertised. The market of Victoria is exploited in this manner to the great detriment of the ultimate users of the article advertised.

Some differences in the methods of advertising deserve attention. The British send to the trade here catalogues, periodical price lists, and publications, whilst both the Americans and the Germans go beyond this by sending slips containing descriptions of every novelty and new pattern. A novelty produced in Great Britain is scarcely known here until it is superseded by another. Foreigners also advertise by sending trial consignments of new goods, a course which the British seldom adopt.

United States catalogues are very superior to British. The illustrations of articles are better, and the letterpress and general appearance are beyond comparison. As an example it may be said that a collection of catalogues of bicycles was examined; the United States were much the best, the German the second best, and the British the worst. Some catalogues of British manufacturers printed in France were fairly good, but those printed in Great Britain were in bad taste as to the covers and general style, and were comparatively badly illustrated. This defect is believed here to have an adverse effect on the sale of goods, especially when models are absent. The obverse side of this should also be shown. It is a frequent cause of complaint that United States and Continental goods are not equal to the illustrations and descriptions, whilst the British catalogues are held to be more faithful representations of the articles offered for sale.

The American, and, in some instances, the Continental, catalogues give much more information than the British, not only in regard to the goods, but also in respect to other matters which are of importance to foreign buyers. These catalogues state the price at an available shipping port, the size of the packages in which the goods are packed, the weight of the packed articles, and such other information as is necessary. An intending buyer with these particulars before him can calculate with some precision the cost at which the goods can be landed in Victoria, whilst without them he may hesitate to give an order.

In this connection it may be mentioned that the Germans use the Reuter code for telegraphing. This is said to be shorter, and, consequently, less costly, than the British codes.

R. W. Best,
Commissioner of Trade and Customs.

VICTORIA.

RETURN.

1. ALKALI.—(a) Soda Ash.

	1884.	1889.	1894.
	£	£	£
Total imports - - -	9,886	7,357	7,015
Foreign countries :—			
Belgium - - - -	1,512	24	—
Germany - - - - -	—	—	116
United States - - -	—	—	184
Total foreign - -	1,512	24	300

Adjusted Estimate of Foreign Imports in 1894.

		£
Total as above - -	£7,015	
United States produce - - - - -		184
German produce - - - - - -		300
		484

Victorian importers buy in the British market, and are unable to say whether the goods they purchase are British or foreign. No particulars can be given, as the small quantity of foreign produce cannot be traced.

(a) Price.—The price is from 6*s.* to 7*s.* per cwt. for 58 per cent.

(e) Other causes.—The freight is about 45*s.* per ton by mail steamer, 32*s.* 6*d.* by cargo steamer, and 20*s.* by sailing vessel, but extremely variable.

1. ALKALI.—(b) Soda, Bicarbonate.

	1884.	1889.	1894.
	£	£	£
Total imports - - -	2,567	2,837	4,532

Estimate of Imports in 1894.

		£
Total as above - -	£4,532	
German produce - - - - - -		250

The remarks under the previous heading apply also to this item.

(a) Price.—The price is from 8*s.* to 9*s.* per cwt. landed in Melbourne.

(e) Other causes.—Freight as for soda ash under previous heading.

1. ALKALI.—(c) Soda, Caustic.

	1884.	1889.	1894.
	£	£	£
Total imports - - -	7,994	12,023	16,886
Foreign countries :—			
Belgium - - - - -	—	—	101
Germany - - - -	—	—	75
Total foreign - -	—	—	176

Estimate of Imports in 1894.

		£
Total as above	£16,886	
Belgian produce		550
German produce		300
		850

The remarks under heading No. 1 (*a*) apply also to this item.

(*a*) Price.—The price is about 10*l.* per ton for 70 per cent. standard, landed in Melbourne.

(*e*) Other causes.—Freight as for soda ash. *See* heading No. 1 (*a*).

1. ALKALI.—(*d*) Soda, Nitrate.

	1884.	1889.	1894.
	£	£	£
Total imports	4,427	3,967	3,008

Estimate of Imports in 1894.

		£
Total as above	£3,008	
German produce		2,000
Chilian produce		1,000
		3,000

The German nitrate of soda or Chilian saltpetre is made up into 1-cwt. cakes, like British nitrate of potash, for which it is said to be sometimes sold.

(*a*) Price.—The price is from 10*s.* to 12*s.* per cwt. landed in Victoria.

(*b*) Quality.—There is no British for comparison.

(*c*) Suitability.—Equal.

(*d*) Packing.—Does not affect this item.

(*e*) Other causes.—Freight the same as for soda ash. *See* heading No. 1 (*a*).

1. ALKALI.—(*e*) Potash, Nitrate.

	1884.	1889.	1894.
	£	£	£
Total imports	2,802	2,212	2,645
Foreign countries :—			
Germany	—	414	554

Estimate of Imports in 1894.

		£
Total as above	£2,645	
German produce		£700

(*a*) Price.—The price of British saltpetre is 31*l.* to 32*l.* per ton, and of German 27*l.* to 28*l.* per ton, wholesale in Melbourne. The German is displacing the British. Indian is worth about 22*l.* 10*s.* per ton.

(*b*) Quality.—The quality of the German is said to be equal to that of the British.

(*c*) Suitability.—Equal.

(*d*) Packing.—The packing of British and foreign is similar.

(*e*) Other causes.—The freight is the same as for soda ash. *See* heading No. 1 (*a*).

1. Alkali.—(*f*) Soda, Silicate.

	1884.	1889.	1894.
	£	£	£
Total imports	3,195	1,962	2,509
Foreign countries :—			
France	2	—	—
Belgium	—	18	—
Germany	—	—	8
Total foreign	2	18	8

Estimate of Imports in 1894.

The above table indicates as far as is known the countries of produce.
Practically all is purchased in England, but the country of origin is not known here.

3. Apparel and Slops.

	1884.	1889.	1894.
	£	£	£
Total imports	345,903	560,091	226,828
Foreign countries :—			
Belgium	53	—	823
China	1,607	606	456
France	1,105	4,375	743
Germany	720	6,657	7,647
Italy	94	—	20
Japan	—	13	109
United States	—	2,312	531
Total foreign	3,579	13,963	10,329

Estimate of Imports in 1894.

		£
Total as above	£226,828	
German produce		42,000
Other foreign produce		30,000
		72,000

Nearly all apparel and slops worn in Victoria is of local manufacture, but a few descriptions are still imported. They are as follows :—

Ties are nearly all British but made of foreign silk.
Braces are all British.
Ready-made Clothing for men and boys is nearly all British.
Corsets are for the most part British.

This constitutes the greater part of the value shown above.

The following are the descriptions of apparel in which there is most foreign competition :—

Hosiery, Woollen and Mixed.—The imports amount to about 70,000*l.* per year, of which about one-third is German.

The foreign portion consists principally of underclothing, socks, and stockings.

Underclothing—(*a*) Price.—Samples with prices attached are forwarded,

(*b*) Quality.—The German is of all qualities, the range being about equal to that of the British, but in the inferior kinds the appearance is better.

(*c*) Suitability.—The cheaper German descriptions are woven in the piece and cut out, whilst the British are woven to the fashion or shape. The latter are preferred, but they are dearer.

(*d*) Packing.—The German goods are better boxed and more neatly got up than the British.

(*e*) Other causes.—The best quality of German underclothing, the "Jaeger," has been established in this market solely by advertising. The name has become well known, and goods bearing that brand are asked for. They are not either better or cheaper than the corresponding goods of British manufacture.

American Oilskin Clothing.—(*a*) Price.—The price of American is about equal to that of British.

(*b*) Quality.—The quality of British and American is about equal. The Americans are careful to ship none but well-cured goods.

(*c*) Suitability.—In this respect also the British and foreign goods are equal.

(*d*) Packing.—The United States manufacturers pack in smaller and more compact cases, for which they make no charge.

(*e*) Other causes.—The American goods have been imported for many years, and the manufacturers have obtained a reputation for the reliability and excellence of their articles, which will make them hard to displace.

Socks and Stockings.—The foreign socks and stockings consist principally of Saxony hose and some merino hose made in Germany.

(*a*) Price.—Samples with prices attached are forwarded. The German goods are cheaper than British in the lower qualities.

(*b*) Quality.—The quality of the German goods is, perhaps, inferior to that of the English, but the lower lines are of better finish. The Germans have adopted a fast dye for inferior goods. The dyeing of the cheaper descriptions is generally better than that of the same class of British goods.

(*c*) Suitability.—There is no superiority in the style of German socks.

(*d*) Packing.—German goods are better boxed.

(*e*) Other causes.—The German goods are bought for their better appearance combined with the low price.

Gloves, Fabric.—The imports are of the value of about 22,000*l.* per year, and the trade is almost wholly German. They have the market for all kinds—silk, taffeta, lisle, and cashmere. There are few British goods in the market for comparison.

(*a*) Price.—Some samples with prices attached are forwarded.

Handkerchiefs.—The trade is of the value of about 8,000*l.* per year, of which about one-third is at present Japanese.

(*a*) Price.—Sample of Japanese with the price is forwarded.

(*b*) Quality.—Good.

(*c*) Suitability.—They are in fashion,

(*d*) Packing.—Does not affect this item.

(*e*) Other causes.—The British are not offering the same styles and patterns.

4. ARMS AND AMMUNITION.—(*a*) Firearms, Small.

——	1884.	1889.	1894.
	£	£	£
Total imports - - -	12,538	23,686	4,896
Foreign countries:—			
Belgium - - -	397	746	885
France - - - -	—	935	—
Germany - - -	119	1,435	788
United States - - -	344	1,492	569
Total foreign - -	860	4,608	2,242

Estimate of Imports in 1894.

	£4,896	£
Total as above - -		
German produce - - - - -		1,000
Belgian produce - - - - -		1,000
United States produce - - - -		569
		2,569

Sporting Guns.—(*a*) Price.—German and Belgian guns are from 7*s.* to 32*s.* 6*d.* each. British from 45*s.* to 30*l.* each.

(*b*) Quality.—The Continental guns generally range from inferior to dangerous, but there are a few of good quality by well-known makers. The British of the lowest price are of fair quality, and the greater part are of superior manufacture.

(*c*) Suitability.—The patterns and styles of Continental guns are copied from the British.

(*d*) Packing.—The foreign packing is very rough. The English is better, but uneven.

(*e*) Other causes.—English makers import guns from the Continent in an unfinished or "soft" state or in parts; they are put together, coloured, and finished in England, proved and branded with an English name, and exported here. This tends to destroy British prestige.

Pistols and Saloon Rifles.—The above remarks apply to pistols also. A pistol of English make costing about 35*s.* is imitated in Belgium, the imitated article costing about 7*s.* 6*d.* The Belgian pistol is very inferior, but almost identical in appearance with the British. The German and Belgian saloon rifles and revolvers are of better quality than their guns, and are in general use. Some superior revolvers are imported from the United States.

Sporting Rifles.—The sporting rifle most largely used here is the American Winchester repeating rifle.

4. ARMS AND AMMUNITION.—(*b*) Gunpowder.

——	1884.	1889.	1894.
	£	£	£
Total imports	22,418	51,006	15,391
Foreign countries:—			
Belgium	351	804	—
Germany	350	3,460	161
United States	—	—	387
Total foreign	701	4,264	548

Estimate of Imports in 1894.

The above table correctly represents the countries of produce.

Since 1894, however, a larger quantity of German blasting powder has been imported, and the foreign trade amounts to more than 5 per cent. of the total.

(*a*) Price.—British blasting powder is from 5*d.* to 6*d.* per lb. German from 4½*d.* per lb. upwards.

(*b*) Quality.—All explosives must be of good quality to pass the Government inspection, but the German is not equal to the British.

(*c*) Suitability.—Blasting powder is being superseded by gelatine compounds.

(*d*) Packing.—No difference.

(*e*) Other causes—Freight.—The facilities for shipping from Great Britain are greater, and the rates probably less than from the Continent.

Sporting powder, which is included in the above heading, is practically all British produce.

4. ARMS AND AMMUNITION.—(*c*) Of all other Kinds. (*a*) Dynamite.

——	1884.	1889.	1894.
	£	£	£
Total imports	7,630	23,244	1,550
Foreign countries:—			
Belgium	—	1,368	—
Germany	3,570	7,865	436
Total foreign	3,570	9,233	436

Estimate of Imports in 1894.

The above table correctly represents the country of produce.

This heading does not include gelatine dynamite.

(*a*) Price.—The price at present is 3*l.* 14*s.* 2*d.* per case of 50 lbs. wholesale in bond.

(*b*) Quality.—Explosives are all subjected to a vigorous supervision, and those that are passed on importation must necessarily be of good quality, whether British or foreign. Large quantities have been destroyed on arrival, in consequence of their having been found to be below the necessary standard.

(*c*) Suitability.—Dynamite has been largely displaced by gelatine compounds.

(*d*) Packing.—No material difference is noticeable in this respect.

(*e*) Other causes.—Nil.

4. ARMS AND AMMUNITION.—(*c*) Of all other Kinds. (*b*) Gelatine Compounds.

——	1884.	1889.	1894.
	£	£	£
Total imports - - -	—	6,277	27,765
Foreign countries :—			
Belgium - - -	—	—	467
Germany - - - -	—	—	267
Total foreign - -	—	—	734

Estimate of Imports in 1894.

The above table correctly represents the countries of produce in 1894, but since that date a rather greater proportion of foreign has been imported.

(*a*) Price.—The wholesale price in Victoria, in bond, is—

	£	*s*	*d.*		
Gelignite - -	3	14	2	per case of	50 lbs.
Gelatine dynamite - -	4	3	8	„	50 „
Blasting gelatine - -	4	13	2	„	50 „

(*b*) Quality. — The remarks under No. 4 *c* (*a*) dynamite apply to gelatine compounds.

(*c*) Suitability.—Gelatine compounds are superseding all other blasting materials.

(*d*) Packing.—A large quantity has been destroyed, under Government supervision, owing to the exudation of the nitro-glycerine. It cannot be said that there is any difference in this respect between the British and the foreign article.

4. ARMS AND AMMUNITION.—(*c*) Of all other Kinds. (*c*) Cartridges.

No statistics can be given of cartridges, for the reason that in 1894 duty was charged on the powder and the shot contained in the cartridge cases, and these were entered under their respective headings. The following is, however, an estimate of the imports of 1894 :—

	£8,000	£
Total imports - -		
United States produce - - - -		2,400
Belgian produce - - - - -		800
German produce - - - - -		300
		3,500

(*a*) Price.—A comparison of price is scarcely possible, as the trade of each country is in a different article. The Belgians send empty cartridge cases principally; the Americans, the special cartridges for sporting rifles, saloon rifles, and pistols; whilst the British supply most of the ordinary sporting shot cartridges. In shot cartridges the United States and Great Britain are in competition, and the range of prices is about equal. The Belgian cartridge cases are very cheap—about 16*s.*—whilst English are 24*s.* Very cheap cases and wads are now arriving from Germany.

Sporting Guns.—(*a*) Price.—German and Belgian guns are from 7*s.* to 32*s.* 6*d.* each. British from 45*s.* to 30*l.* each.

(*b*) Quality.—The Continental guns generally range from inferior to dangerous, but there are a few of good quality by well-known makers. The British of the lowest price are of fair quality, and the greater part are of superior manufacture.

(*c*) Suitability.—The patterns and styles of Continental guns are copied from the British.

(*d*) Packing.—The foreign packing is very rough. The English is better, but uneven.

(*e*) Other causes.—English makers import guns from the Continent in an unfinished or "soft" state or in parts; they are put together, coloured, and finished in England, proved and branded with an English name, and exported here. This tends to destroy British prestige.

Pistols and Saloon Rifles.—The above remarks apply to pistols also. A pistol of English make costing about 35*s.* is imitated in Belgium, the imitated article costing about 7*s.* 6*d.* The Belgian pistol is very inferior, but almost identical in appearance with the British. The German and Belgian saloon rifles and revolvers are of better quality than their guns, and are in general use. Some superior revolvers are imported from the United States.

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(*b*) Quality.—All explosives must be of good quality to pass the Government inspection, but the German is not equal to the British.

(*c*) Suitability.—Blasting powder is being superseded by gelatine compounds.

(*d*) Packing.—No difference.

(*e*) Other causes—Freight.—The facilities for shipping from Great Britain are greater, and the rates probably less than from the Continent.

Sporting powder, which is included in the above heading, is practically all British produce.

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Foreign countries:—			
Belgium	—	1,368	—
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(*b*) Quality.—Explosives are all subjected to a vigorous supervision, and those that are passed on importation must necessarily be of good quality, whether British or foreign. Large quantities have been destroyed on arrival, in consequence of their having been found to be below the necessary standard.

(*c*) Suitability.—Dynamite has been largely displaced by gelatine compounds.

(*d*) Packing.—No material difference is noticeable in this respect.

(*e*) Other causes.—Nil.

4. ARMS AND AMMUNITION.—(*c*) Of all other Kinds. (*b*) Gelatine Compounds.

	1884.	1889.	1894.
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Total imports - - -	—	6,277	27,765
Foreign countries :—			
Belgium - - -	—	—	467
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(*a*) Price.—A comparison of price is scarcely possible, as the trade of each country is in a different article. The Belgians send empty cartridge cases principally; the Americans, the special cartridges for sporting rifles, saloon rifles, and pistols; whilst the British supply most of the ordinary sporting shot cartridges. In shot cartridges the United States and Great Britain are in competition, and the range of prices is about equal. The Belgian cartridge cases are very cheap—about 16*s.*—whilst English are 24*s.* Very cheap cases and wads are now arriving from Germany.

VICTORIA.

(*b*) Quality.—The American cartridges are about equal in quality to the British. The German and Belgian cases are of low quality and price.

(*c*) Suitability.—The British cartridges suit the market for the large quantity of weapons to which they are adapted, but they do not fill all requirements. The American cartridges are made specially for their own weapons, and the German and Belgian to supply the demand for a cheaper article than is sent by Great Britain.

(*d*) Packing.—Until lately, British cartridges were put up in packages of 100, whilst American were contained in convenient packages of 25. The latter size is much preferred here. British manufacturers are now putting some up in packages of 25; but in the meantime the Americans have established a trade largely in consequence of their more suitable packing. The American cases are also of even size, containing 500 each, whilst the British cases are of any size.

(*e*) Other causes.—This item is not specially affected by freight, terms, or any other cause.

9. BOOKS, PRINTED.

	1884.	1889.	1894.
	£	£	£
Total imports	248,216	260,494	145,298
Foreign countries:—			
Belgium	6	—	22
China	12	36	33
France	482	1,081	97
Germany	323	730	656
Japan	—	—	45
United States	2,106	424	1,496
Total foreign	2,929	2,271	2,349

Estimated Imports in 1894.

	£
Total as above — £145,298	
German produce	60,000
United States produce	1,496
Other foreign produce	600
	62,096

Nearly all general literature for Victoria is printed in Great Britain, the only exceptions being a few works in foreign languages and the writings of some British authors, which are published in the United States in consequence of the provisions of the Copyright Act in that country. The latter are becoming more numerous.

The bulk of children's books and picture books are of German manufacture, although they are issued by British publishers. The authorship and the designs are, for the most part, British, but the printing and binding are done in Germany. These books are nearly half of the total importations. In some instances the letterpress of such books, and also of novels, &c., is British, whilst the pictures and coloured covers are German.

Books are generally bought in Great Britain from the publishers, and thus find their way into Victorian statistics as British, although they may be of foreign manufacture.

(*a*) Price.—It is impossible to give a price that would apply to any considerable class of books.

(*b*) Quality.—The quality of the German manufacture is for the most part good. The printing and the binding is not considered quite equal to British. The coloured pictures and illustrations, which are of British designs, are good at the prices charged. A few American children's books which have been sent here are inferior, and dear in proportion to the quality.

(*c*) Suitability.—The British-German books are suitable to the market.

(*d*) Packing.—Does not affect this item.

The above remarks apply also to much printed music, in so far as they deal with the printing in Germany of the works of British publishers.

11. CANDLES OF ALL SORTS.

	1884.	1889.	1894.
	£	£	£
Total imports	45,905	32,139	12,018
Foreign countries:—			
Belgium	1,565	1,745	3,789
France	1,930	—	—
Germany	1,451	11,118	772
Total foreign	4,946	12,863	4,561

Estimated Imports in 1894.

	£12,018	£
Total as above		
Belgian produce		9,000
German produce		2,000
		11,000

The consumption of Victoria is supplied almost wholly by local manufacture.

(*a*) Price.—An average wholesale price is about $4\frac{7}{8}d.$ per lb. A sample is forwarded, with the price attached; this price is that which Victorian retailers have paid to importers.

(*b*) Quality.—The imports for domestic purposes are very small. The foreign candles are required principally for use in mines. For this purpose they must be of good class, hard, and with a high melting point. The British candles of this class are too dear for common use.

(*c*) Suitability.—The trade shows that the Belgian and German candles are suitable.

(*d*) Packing.—There is no material difference in this respect.

(*e*) Other causes.—The trade is not materially affected by the differences of freight terms, &c.

14. CEMENT.

	1884.	1889.	1894.
	£	£	£
Total imports	61,325	223,052	5,429
Foreign countries:—			
Belgium	437	700	—
France	8	85	97
Germany	5,176	13,262	—
United States	50	—	—
Total foreign	5,671	14,047	97

This heading includes cements which have sulphate of lime as a basis only

Estimate of Imports in 1894.

	£5,429	£
Total as above		
German produce		500
French produce		100
		600

The importation of cement fell greatly in 1894, owing to the cessation of both public and private works in a time of depression, and the overstocking of the market. The

figures for that year do not approximately represent the annual trade. For the open market—that is, excluding contracts for public works—the greater part now being imported is German.

(*a*) Price.—At present the quotations are: for German, 7*s.* 6*d.* per cask, cost, insurance, and freight paid; for English, 5*s.* 3*d.*, less 2½ per cent. free on board at London. At these prices, German cement is the cheapest, the freight from London to the Melbourne wharf being 2*s.* 5*d.* per cask, and the insurance and other charges perhaps 2*d.* per cask.

(*b*) Quality and (*c*) Suitability.—Most of the cement used in Victoria is for public works, and when required for this purpose cement is subjected to a severe test. It therefore follows that most cement, whether British or foreign, must be of good quality. In some instances, British cement of known brands is specified in the contracts. The German cement is not so good as the British as regards its strength and general quality, but it is said to be better manufactured, being finely ground by steel rollers. Some British cement has been rejected for public works, owing to the fact that in testing it was found to contain grit.

(*d*) Packing.—Foreign and English cements are casked in the same manner.

(*e*) Other causes.—Cement is affected greatly by differences of freight. The quoted freights are so often departed from that they are no guide to shippers. The wool ships leaving Great Britain to load here bring cement for ballast; and it has been carried in this manner at as low as 1*s.* per cask. The present rate (1896) of freight from London is 2*s.* 5*d.* per cask. This is higher than usual, vessels being scarce. The freight from Germany cannot be exactly stated. German cement is generally quoted with freight paid, and it is probable that large concessions are granted at times to German shippers by shipowners in want of dead weight. When freight from Germany is paid by Victorian importers, the rate of freight is generally about 2*s.* per cask, but communication with Germany by sailing vessels is irregular. The steamers require cement for dead weight, and probably give large concessions, which are not made public, to obtain it. As stated elsewhere, this is one of the few descriptions of goods upon which the subsidised line of German steamers depends for heavy weight, and without which it could not be kept up except at a loss.

15. CHEESE.

	1884.	1889.	1894.
	£	£	£
Total imports	1,227	4,794	1,326
Foreign countries:—			
Belgium	—	—	—
France	46	153	—
Germany	46	590	67
Italy	28	—	—
Other	—	—	—
Total foreign	120	743	67

The foreign importations consist of a few special kinds not made in Great Britain, such as Limburger. They are of so little importance that it has not been thought necessary to send samples or descriptions.

16. CHEMICAL PRODUCTS AND DYE-STUFFS.—(*a*) Acids.

	1884.	1889.	1894.
	£	£	£
Total imports	14,203	30,770	28,468
Foreign countries:—			
Belgium	—	—	632
France	—	—	5,119
Germany	658	1,550	539
Italy	—	—	834
Other	—	—	13
Total foreign	658	1,550	7,137

Estimate of Imports in 1894.

	£
Total as above - - £28,468	
French produce - - - - - -	10,000
German produce - - - - - -	1,000
Italian produce - - - - - -	834
Belgian produce - - - - -	1,200
	13,034

Foreign acids are nearly all bought in Great Britain, and it is consequently extremely difficult to make an estimate of the trade.

Tartaric Acid.—The British is generally guaranteed 95 per cent. of acidity, whilst the French and Italian is of a somewhat smaller percentage, and proportionately cheaper. The retail buyers often do not know the strength and buy the cheaper articles. The price, landed here, is about 1*s.* 4*d.* per lb. for British, and ½*d.* less for foreign.

Citric Acid is believed to be all, or nearly all, British. The price is about 1*s.* 4*d.* per lb.

Acetic Acid.—About three-fourths of the importations are German produce and one-fourth British. The greater part of that used is made in the Colony.

Salicylic Acid.—The importations are almost entirely German. Until lately a German firm had the sole right to make under Kahle's patent.

(*a*) Price.—The price is 3*s.* 9*d.* per lb., and falling.

(*b*) Quality.—In some instances foreign acids are of lower grade, but those imported from well-known German houses are of good quality.

(*c*) Suitability.—Articles of a comparatively low percentage of strength can be sold to ignorant retail buyers, but in no real sense is there any difference in suitability.

(*d*) Packing.—Some remarks, which apply to all bottled chemicals, will be found under the heading "16 (*c*) Other."

(*e*) Other causes.—The dangerous acids, or such as have to be stowed on deck, are carried at about 5*l.* per ton by cargo steamers, and 4*l.* 10*s.* per ton by sailing vessels. The mail steamers will not carry them. The expenses from the Continent must be greater, but they are not well known here. Foreign terms are about the same as British.

16. CHEMICAL PRODUCTS AND DYE-STUFFS.—(*b*) Sulphur.

——	1884.	1889.	1894.
	£	£	£
Total imports - - -	10,152	4,620	6,908
Foreign countries:—			
France - - - -	—	145	67
Germany - - - -	—	—	111
Italy - - - -	—	—	4,100
Spain - - - -	11	—	—
Total foreign - -	11	145	4,278

Estimate of Imports in 1894.

The above table correctly indicates the countries of manufacture.

(*a*) Price.—The price of sulphur refined in Britain is 8*l.* 10*s.* per ton in Victoria. The lower grades, refined in Italy, are cheaper in ratio to the purity.

(*b*) Quality.—The grade of sulphur is so little known to retail buyers that the cheapest is most in demand.

(*c*) Suitability.—Answered by the above.

(*d*) Packing.—Alike.

(*e*) Other causes.—The freight is about 45*s.* by mail steamer, 32*s.* 6*d.* by cargo steamer, and 20*s.* by sailing vessels. Probably the Italian refined sulphur is at a disadvantage, as there are no sailing ships voyaging from Italy to Victoria, and the cargo

steamers would not make much concession for the somewhat shorter distance. Some is brought by the North German Lloyd's subsidised line, the vessels of which call at Genoa.

16. CHEMICAL PRODUCTS AND DYE-STUFFS.—(*c*) Other.

	1884.	1889.	1894.
	£	£	£
Total imports	93,205	95,080	75,490
Foreign countries :—			
Belgium	487	1,285	338
China	434	668	216
France	129	280	865
Germany	1,278	3,600	5,154
Italy	—	—	365
Japan	—	—	175
Other	—	—	5
United States	879	2,591	929
Total foreign	3,207	8,424	8,047

Estimate of Imports in 1894.

	£75,490	£
Total as above		
Belgian produce		600
French produce		1,600
German produce		12,000
Italian produce		365
United States produce		1,000
Other foreign produce		600
		16,165

Cream of Tartar.—(*a*) Price.—The price in Victoria is 1*s.* 0¼*d.* per lb.

(*b*) Quality.—The British is of 95 per cent. grade; the foreign about 85 per cent.

(*c*) Suitability.—The grade is not well known to retail buyers, who consequently buy the foreign article for its cheapness.

(*d*) Packing.—See remarks at end under this heading.

The foreign trade is increasing.

Arsenic is of British manufacture.

Borax.—Nearly all the imports are from the United States.

(*a*) Price.—The price of the United States product is slightly less than that of the British.

(*b*) Quality.—Equal.

(*c*) Suitability.—Equal.

(*d*) Packing.—Equal.

(*e*) Other causes.—Freight, &c.—From the United States the charges are rather higher than from Great Britain.

Glycerine is nearly all of local manufacture, but a small quantity is imported from Germany.

(*a*) Price.—The price for pure German glycerine is 8¾*d.* per lb.

(*b*) Quality.—British and foreign are of equal quality, both being 1·260 s.g.

(*c*) Suitability.—There is a limited demand for German glycerine for special purposes.

(*d*) Packing.—Not important.

(*e*) Other causes.—Not important.

Sulphate of Magnesia.—About half the importations are German and half British.

(*a*) Price.—British, 90*s.* per cwt.; German, 81*s.* per cwt.

(*b*) Quality.—About equal.

(*c*) Suitability.—Equal.

(*d*) Packing.—See remarks at end of this heading.

(*e*) Other causes.—Not important.

Gums.—The importations are from Great Britain, but they are doubtless of various countries of origin. The trade must be considered British.

Cyanide of Potassium.—Will be an important item in extracting gold. The German and English are offered at about the same price, and an effort will be necessary to conserve the trade.

Packing.—The containers of all British chemicals are considered very inferior, especially the bottles for dry chemicals. These bottles are of inferior glass, of bad colour, and bad make; the labels are ugly and often put on crookedly; the stoppers are unsightly sealing-wax or tinfoil; and the outside paper wrappers are of the commonest description. The German chemicals, on the other hand, are put up in bottles of clear glass or of colours suited to the material contained, well made, and of good shape; the labels are tastefully coloured, and the stoppering is good. The American chemicals are also very much better put up than the British. This matter is of importance, in view of the fact that, partly owing to this cause, the British trade is losing ground.

16. CHEMICAL PRODUCTS AND DYE-STUFFS.—(*d*) Dye-stuffs.

	1884.	1889.	1894.
	£	£	£
Total imports	16,169	20,325	20,212
Foreign countries:—			
Belgium	—	52	429
Egypt	—	—	87
France	—	272	—
Germany	20	265	1,482
Norway	—	497	—
Other	5	—	74
Sweden	—	—	177
United States	110	154	89
Total foreign	135	1,240	2,338

Estimate of Imports in 1894.

	£
Total as above — £20,212	
Belgian produce	600
German produce	3,000
Other foreign produce	800
	4,400

The principal kinds used here, such as logwood, redwood, fustick, cutch, and bichromate of potash are mostly British, but some of all sorts have been imported from Germany. There is no quotable price for most of the German products, as they have been generally imported by the users, and not for sale. It is said that the German product is displacing the English.

Some aniline dyes are imported from Germany, and great efforts are being made to foster this trade. The better are British, but the German dyes are the cheaper.

18. CLOCKS AND WATCHES.—(*a*) Clocks.

	1884.	1889.	1894.
	£	£	£
Total imports	14,587	18,439	5,642
Foreign countries:—			
Belgium	181	94	—
France	134	1,224	194
Germany	57	335	159
United States	5,672	8,506	2,841
Total foreign	6,044	10,159	3,194

Estimate of Imports in 1894.

	£5,642	£
Total as above		
United States produce		2,841
German produce		1,000
French produce		300
		4,141

(*a*) Price.—It is not possible, with the great number of patterns and styles in the market, to quote actual prices, but judging from the British clocks imported, it may be said that British clocks of many of the patterns and styles of the German and American would be as cheap as the manufactures of those countries if they were offered.

(*b*) Quality.—The whole supply of marble clocks is from France. These clocks are of good quality and of elegant design. German clocks are of a wide range of qualities and patterns; the greater number being of wood and nickel. The United States send nickel, wood, and iron clocks. In the first named they have command of the market, their speciality being large lines of cheap and useful articles, but their supremacy is being challenged by the Germans, who are sending still cheaper nickel clocks of more showy appearance. United States wooden clocks are of fair quality and of popular designs, and iron clocks, which are not in extensive use here, are of comparatively new introduction. They are enamelled in imitation of marble. So far they have not met with marked success.

The British clocks are of the best quality and of good patterns, but there is a limited number of styles imported. They consist principally of fancy clocks and dial clocks for public buildings.

(*c*) Suitability.—The clocks of German and United States manufacture are suitable for this market. The patterns are sufficiently numerous to meet all tastes. The British clocks are also suitable as far as the patterns extend, but there are not in this market any of the cheap kinds required to suit the circumstances of the largest class of buyers. It is thought here by many in the trade that if the British made a sufficient variety of patterns they would be able to compete with foreign manufacturers.

(*d*) Packing.—American clocks, even the cheapest, are usually packed neatly, each in a cardboard box, ready to hand to a retail customer. This packing finds favour.

(*e*) Other causes.—Freight affects to some extent the cheaper kinds of clocks. As regards continental and British, the conditions are nearly alike. The American clocks come by sailing ships at about 27*s.* per ton measurement. In sailing ships they could be brought from Great Britain for perhaps less; but they usually come in steamers at an advanced rate, according to the speed and regularity with which orders can be supplied.

18. CLOCKS AND WATCHES.—(*b*) Watches.

	1884.	1889.	1894.
	£	£	£
Total imports	79,973	60,373	13,558
Foreign countries:—			
France	1,320	426	22
Germany	—	520	31
Switzerland	—	—	110
United States	—	—	554
Total foreign	1,320	946	717

Estimate of Imports in 1894.

	£13,558	£
Total as above		
United States produce		4,500
Swiss produce		5,000
Other foreign produce		1,000
		10,500

There has lately been some increase of British trade as compared with foreign trade.

(*a*) Price.—The United States sends to this market a celebrated brand of watches of all grades, the lowest price for a silver watch, either keyless or otherwise, being 21*s*. The English watches by equally celebrated British makers begin at a much higher price —some are as low as 31*s*. each, others begin at 39*s*. each for key winders and 50*s*. each for keyless watches. The British prices have fallen greatly during the past few years. There is a considerable demand for Geneva watches, of which sound timekeepers in nickel are produced as low as 4*s*. each in price, and from that upwards. American cheap nickel watches are also sold here, and their sale interferes with that of the Swiss watches. The prices quoted are the invoice prices of the manufacturers, as the trade does not admit of quotable wholesale prices in Victoria.

(*b*) Quality.—The better United States watches are those of which the works are factory-made in large quantities, and the parts to a great extent interchangeable. They are of good quality, and of rather more showy designs than British watches.

British watches are of somewhat simpler and more substantial design than those from the United States; they are considered to be of better quality for wear and to be very trustworthy. Their high price is the one reason for their use not being general, and it is possible that, with the returning prosperity of the people, they will be more sought after. It is not necessary to describe the quality of the extremely low-priced nickel timekeepers with which the British do not attempt to compete in Victoria. The trade in such goods is very considerable.

(*c*) Suitability.—The British watches are on the whole of too high a class for the requirements of this Colony, where both poor and rich and both young and old carry watches. The success of the foreign watches is due to the fact that foreign manufacturers cater for the needs of all classes of buyers, whilst British manufacturers supply only one class.

(*d*) Packing.—The watch trade is not affected by any difference in this respect.

(*e*) Other causes.—Freight does not greatly affect the trade in watches, but in this foreign manufacturers must be at a disadvantage, as nearly all the watches come through London.

20. CORDAGE AND TWINE.—(*a*) Hempen and Flaxen Rope.

——	1884.	1889.	1894.
	£	£	£
Total imports - - -	1,067	3,927	1,133
Foreign countries :—			
Hong Kong* - - -	—	540	1,020
Germany - - -	60	—	—
United States - -	—	26	—
Total foreign - -	60	566	1,020

* The port of Hong Kong in this return is apparently treated simply as the entrepôt of a considerable foreign trade.

As will be seen from the above return, the whole of the importations are British This Colony almost completely supplies its own consumption, but is subject to the competition of the British Colony of Hong Kong in Manilla rope.

20. CORDAGE AND TWINE.—(*b*) Twine.

——	1884.	1889.	1894.
	£	£	£
Total imports - - -	23,078	32,244	18,210
Foreign countries :—			
France - - -	9	—	—
Germany - - -	33	75	—
Italy - - - -	—	540	—
Other - - - -	—	—	—
United States - -	63	951	1,256
Total foreign - -	105	1,566	1,256

Estimate of Imports in 1894.

The above table correctly represents the countries of produce.

No particulars in respect to this item are given, for the reason that since the year 1894 the foreign manufacture has been displaced.

23. COTTON MANUFACTURES.—(*a*) and (*d*) Piece Goods, White or Plain, Printed, Checked, or Dyed, of Mixed Materials, and Lace and Patent Net.

——	1884.	1889.	1894.
	£	£	£
Total imports - - -	882,392	892,566	842,940
Foreign countries:—			
Belgium - - -	—	97	904
China - - -	8	50	631
France - - - -	6,844	8,225	4,999
Germany - - -	203	3,017	4,052
Other - - -	110	99	142
United States - -	397	1,686	2,231
Total foreign - -	7,562	13,174	12,959

Estimate of Imports in 1894.

	£
Total as above - - £842,940	
French produce - - - - - -	15,000
German produce - - - - - -	25,000
Swiss produce - - - - - -	8,000
United States produce - - - - -	2,231
Other foreign produce - - - - -	4,500
	64,731

The different descriptions included in this heading are inseparable in Victorian returns.

The principal lines in which there is foreign competition are laces, cotton velvets, cotton tweeds, regatta prints for shirts, flannelettes, and dress goods.

This heading does not include cotton mixed with wool, which in the statistics of this Colony is treated as a woollen mixture.

All the principal lines of dress good, calicoes, and plain printed, and dyed materials, are British; whilst goods of more elaborate pattern are, to some extent, foreign.

Lace and Patent Net.—(*a*) Price.—Some samples, with prices attached, are forwarded.

(*b*) Quality.—The higher qualities are from Switzerland and Saxony, whilst the trade in the poorer kinds is British.

(*c*) Suitability.—The Nottingham laces, which at one time filled all market requirements, have been displaced by guipure and appliqué laces from Switzerland, Saxony, and other places. The British manufacturers have not followed the taste of the people, and have lost much of the trade. Not only have the Nottingham laces been displaced, but Honiton laces, which were British, and which at one time were in general use, have been superseded by the torchons laces, which are foreign manufacture, and which are found more suitable to this market.

(*d*) Packing.—Does not appreciably affect this item, but foreign goods are better boxed.

(*e*) Other causes.—Not important.

Cotton Tweeds.—(*a*) Price.—Some samples, with prices attached, are forwarded.

(*b*) Quality.—The German and Austrian cotton tweeds are of superior quality to the British. They are a better imitation of woollen tweeds, and better finished.

(*c*) Suitability.—The designs are copies of British designs of woollen tweeds, and therefore equally suitable.

(*d*) Packing This item is not affected.

(*e*) Other causes.—Not of importance.

Regatta Prints.—(*a*) Price.—Some samples, with prices, are forwarded.
(*b*) Quality.—For the same price, the French are of superior quality.
(*c*) Suitability.—The French designs are the most popular.
(*d*) Packing does not affect this article.
(*e*) Other causes.—Not important.

Flannelette.—Plain flannelettes are for the most part British, but large quantities of printed, checked, and dyed are imported from Germany.

(*a*) Price.—Some samples of somewhat above average quality Saxony flannelettes at 5*d.* per yard, landed in Melbourne, are enclosed. The range of prices is higher than for British in those kinds which the British export to Victoria, but there is a large number of popular and good designs produced in Germany, and not in Great Britain. When the British manufacturers produce any of these lines, it is the experience here that they generally undersell the German.

(*b*) Quality.—The foreigners and the British produce all qualities.

(*c*) Suitability.—It is wholly the suitability of the German goods that leads to their importation. It is the variety and attractiveness of the designs. The opinion expressed here is that the British manufacturers have been slow to realise our requirements in this respect.

(*d*) Packing.—This item is not affected.

(*e*) Other causes.—The German trade is fostered with more energy.

Dress Goods.—Nearly the whole of these are British, but those of the best patterns are printed in France; the French designs are better, and the printing is superior. Some low-priced dress goods come from Germany, but they are of too flimsy a nature for general use.

23. COTTON MANUFACTURES.—(*b*) and (*e*) Stockings, Socks, and Hosiery.

	1884.	1889.	1894.
	£	£	£
Total imports	70,852	77,980	65,630
Foreign countries :—			
Belgium	—	—	726
France	354	533	363
Germany	152	1,741	17,762
United States	—	10	16
Total foreign	506	2,284	18,867

Estimate of Imports in 1894.

	£
Total as above	£65,630
German produce	47,000
Belgian produce	2,000
Other foreign produce	2,000
	51,000

The bulk of the importations from Germany consist of Saxony hose—a portion is merino and other makes. Cotton underclothing is included with stockings and socks in the Victorian statistics, but all hosiery containing the smallest quantity of wool is excluded from this heading.

(*a*) Price.—Some samples are forwarded, with the prices attached. The opinion here is that the German manufactures are cheaper than British of equal quality.

(*b*) Quality.—The qualities are of wide range, but the bulk of the German goods are of the cheaper kinds. The German goods succeed principally in consequence of the quality of the dye. The low-class German socks and stockings are superior to the low-class British socks in this respect, the Germans having adopted a fast dye of good colour for inferior materials. Apart from the dyeing there is not much difference in quality between British and foreign goods.

(*c*) Suitability.—There is little variation between British and German or Belgian socks in the pattern or style. Some foreign socks are of different make or fashion to the British, but their popularity is not due to this cause. The seam down the middle of the sole, which is a feature of some foreign and English goods, is not liked.

(*d*) Packing.—The boxing of foreign hosiery is far superior to that of the British, and the predominance of the German trade is thought to be largely due to this and to the attention to details. There is no material difference in the casing for export.

(*e*) Other causes.—Freight and other charges and terms do not give any material advantage either to British or foreign trade. Business is pursued much more vigorously by the Germans than by the British.

Cotton Underclothing.—About one-third of the importations are German, and there is a close competition with the British.

(*a*) Price.—Some samples, with the prices attached, are forwarded. The German goods suceeed solely on account of their cheapness.

(*b*) Quality.—The quality is generally low, sometimes bad. To secure cheapness, many of the German goods are woven in the piece and cut to pattern, whilst the British are usually woven to fashion. The German cotton underclothing is an exceedingly good imitation of woollen, and is well boxed and sightly. The British send the same description of goods to this market, but they are not of such good appearance.

(*c*) Suitability.—German goods are not more suitable to the market than English, except in price.

(*d*) Packing.—The German goods are better boxed.

(*e*) Other causes.—Nil.

24. EARTHENWARE AND CHINAWARE, INCLUDING MANUFACTURES OF CLAY.—

(*a*) Earthenware, including Brownware, Tiles, and Firebricks.

——	1884.	1889.	1894.
	£	£	£
Total imports - - -	111,408	102,589	29,020
Foreign countries :—			
Belgium - - -	163	487	6
China - - -	203	413	37
France - - -	8	863	8
Germany - - -	335	1,627	239
Other - - -	—	14	39
United States - - -	—	71	30
Total foreign - -	709	3,475	359

Estimate of Imports in 1894.

	£
Total as above - - £29,020	
German and Bohemian produce - - - -	3,000
Other foreign produce - - - - -	500
	3,500

The few foreign goods imported consist principally of light hand-decorated tea services and domestic crockery and ornaments.

(*a*) Price.—A few samples, with prices attached, are forwarded. The reason for the importation of the German goods is that they are cheaper than similar British goods.

(*b*) Quality.—In comparison with the price the German goods are of good quality. The Bohemian and Continental mantelpiece or cottage ornaments are a speciality, and there are no British goods for comparison.

(*c*) Suitability.—The German goods suit the tastes and the circumstances of a limited number of people.

(*d*) Packing.—There is no material difference.

(*e*) Other causes.—Some large importations have been subject to the following freights:—

From Germany by sailing ship, 13*s.* 6*d.* to 15*s.* per ton measurement.
" by cargo steamer, 25*s.* per ton measurement.
From Great Britain by sailing ship, 20*s.* per ton measurement.
" by cargo steamer, 30*s.* per ton measurement.

These rates are not, however, constant, and as a general rule goods from Great Britain can be carried as cheaply as from the Continent.

24. EARTHENWARE AND CHINAWARE, INCLUDING MANUFACTURES OF CLAY.—(*b*) CHINAWARE.

	1884.	1889.	1894.
	£	£	£
Total imports	32,610	44,705	21,375
Foreign countries:—			
Belgium	712	214	315
Hong Kong	466	1,244	1,120
France	—	2,005	3
Germany	1,523	5,765	4,155
Japan	—	34	715
Total foreign	2,701	9,262	6,308

Estimate of Imports in 1894.

	£
Total as above £21,375	
German produce	6,000
Belgian produce	2,000
Austrian produce	600
Japanese produce	1,200
Other foreign produce	600
	10,400

The better qualities of white and gold, and nearly all undecorated china, in this market are British. The Germans and Belgians have the trade in cheap china with fancy designs, and in candlesticks. The Germans and Austrians send nearly all the china ornaments and small goods. Japanese trade is increasing; and probably at the present time about 10 per cent. of the importations are from Japan. The ware is sometimes of original design, but much of it is an exact copy of British designs, and the price is very much lower than for the English prototypes.

(*a*) Price.—Some representative samples of china in common use, with the prices attached, are forwarded. There are very few similar goods of British manufacture on the market for comparison.

(*b*) Quality.—The experience of importers here is that in the lower-priced goods the British hand-painted decorations are wanting in finish and generally heavy looking. The Continental, on the contrary, are of light appearance and better handiwork. There are large quantities of German and Bohemian fancy articles of which nothing of a similar description is imported from England—this applies both to china for domestic use and to ornaments, for the cheaper articles of which there is a considerable demand here.

(*c*.) Suitability.—Those that can afford to do so buy mostly British china, but for half of the people the foreign articles of light and novel design and decorated generally with flowers, are the most suitable descriptions offered.

(*d*) Packing.—There is no marked difference in this respect.

(*e*) Other causes.—The remarks on the subject of freight under the heading of "24 (*a*) Earthenware" apply to chinaware. The terms offered to buyers by the British are much more favourable than those given by the Germans. Six months' credit is commonly given in Great Britain, and 30 days' in Germany, but it is doubtful if this has much effect on the trade—terms appear to be very rarely a subject of complaint.

25. Fish.—(*a*) Salted, Herrings and other Sorts.

	1884.	1889.	1894.
	£	£	£
Total imports	30,564	26,242	12,462
Foreign countries:—			
Belgium	130	—	—
China	526	820	836
France	46	2	—
Germany	66	113	468
United States	1,067	790	708
Total foreign	1,835	1,725	1,532

Estimate of Imports in 1894.

The above return correctly represents the countries of produce.

Herrings are inseparable from other fish in Victorian statistics. The importations are all British.

The United States produce shown above is principally salt cod from San Francisco.

The German produce cannot be traced. It was probably surplus ships' stores and chance shipments. There is no regular trade.

The Chinese produce was for the consumption of the Chinese in this Colony.

There is no competition between British and foreign salt fish.

25. Fish.—(*b*) Tinned, Herrings and other Sorts.

	1884.	1889.	1894.
	£	£	£
Total imports	105,308	137,439	35,758
Foreign countries:—			
Belgium	—	518	190
China	—	91	—
France	1,273	259	331
Germany	—	905	495
United States	6,875	25,487	993
Total foreign	8,148	27,260	2,009

Estimate of Imports in 1894.

		£
Total as above	£35,758	
Continental produce		7,500
United States produce		993
		8,493

There is no competition between British and foreign produce, the articles included in each being of different kinds. The whole of the herrings are British. The salmon, with the exception of a small quantity from the United States West Coast, is all British Columbian; the oysters are all United States; and the sardines are all from France, Portugal, and Norway, or other Continental countries. These are the principal kinds sold in Victoria.

As there is no prospect of any foreign trade being diverted to Great Britain, no further particulars have been sought.

26. Furniture, Cabinet and Upholstery Wares.

——	1884.	1889.	1894.
	£	£	£
Total imports - - -	73,719	149,738	8,073
Foreign countries :—			
Belgium -	64	83	16
China - - -	282	2,492	1,037
France - -	25	—	37
Germany	2,962	23,973	1,882
Italy - - -	403	—	1
Japan - - -	31	—	322
Norway - -	—	—	1
United States - - -	14,541	21,306	957
Total foreign - - -	18,308	48,354	4,253

Estimate of Imports in 1894.

		£
Total as above - -	£8,073	
Austrian produce - - - - -		3,000
German produce - - - - -		1,000
United States produce - - - -		1,000
Chinese produce - - - - -		1,037
		6,037

The furniture used in the Colony is now almost entirely of local manufacture, and the home production has displaced British to a greater extent than foreign. The principal items of import remaining are chairs from Austria, the United States, and China, and iron bedsteads, fenders, and fire-irons from Great Britain. Overmantels and toilet mirrors are also still imported to some extent from Great Britain.

Furniture coverings are not included under this heading, as they are placed in the statistics of the Colony under woollen piece goods, silk piece goods, &c., according to the materials of which they are made. Curtains are also similarly treated. Most of the furniture coverings and curtains are of British manufacture, but an exception must be made of felt for curtains. This is nearly all German. Kapok has displaced horsehair for upholstery purposes; it is nearly all imported from some part of the British Empire.

(*a*) Price.—The cost landed in Melbourne of the principal kinds is as follows :—

American Chairs.—Common spindle, wood, 18*s.* 6*d.* to 19*s.* 6*d.* per dozen. Astor Grecian and three-spindle Grecian, oak, 24*s.* to 28*s.* per dozen. Broad, bent-top, dining, oak, 55*s.* to 60*s.* per dozen. Douglas, arm, wood-seat, oak, 50*s.* to 54*s.* per dozen.

Austrian Chairs.—Vienna, bent-wood, 2*s.* 6*d.* each and upwards.

(*b*) Quality.—The quality of furniture used in Victoria is low, and the British furniture is too expensive for the general requirements of the people. The Vienna bent-wood chairs in common use here are of the well-known standard description, and the same may be said of the American oak cane-seated and the wooden kitchen chairs.

(*c*) Suitability.—The designs of the small quantity of British furniture in the Colony are suitable, but, generally speaking, British furniture is too heavy and too dark in colour for the requirements of this market.

(*d*) Packing.—The chairs from Austria and the United States are imported in pieces, to be put together here. The United States cases are of uniform size, so that the goods can be sold by the case.

(*e*) Other causes.—The American makers continually send out trial consignments of novelties in style; the British do not.

VICTORIA.

27. GLASS.—(*a*) Plate, Rough or Silvered. (*a*) Plate.

——	1884.	1889.	1894.
	£	£	£
Total imports - - - -	25,606	42,813	3,256
Foreign countries:—			
Belgium - - -	1,014	4,602	856
France - - - - -	—	14	—
Germany - - -	326	1,894	84
Total foreign - -	1,340	6,510	940

Estimate of Imports in 1894.

		£
Total as above - -	£3,256	
Belgian produce - - - - - -		1,500
German produce - - - - - -		150
		1,650

The imports in 1894 were abnormally low.

(*a*) Price.—British and Belgian plate glass are practically the same price. For ¼-inch plate of 60 feet area the price in Melbourne is 2*s*. per superficial foot, and in proportion for other measurements.

(*b*) Quality.—The quality of British and Belgian glass is about equal. The foreign plate is whiter and better for silvering, but it is said to stain more easily. No silvered plate is imported, all the silvering being done in the Colony. The trade in plate glass depends upon the price. Samples of Belgian plate are forwarded.

(*c*) Suitability.—No material difference.

(*d*) Packing.—The British packing is better than the Belgian. The foreign packages are uglier and bulkier, but the glass carries safely.

(*e*) Other causes.—As a rule the British have a slight advantage in the freights, as may be seen from the fact that much Belgian glass is sent to London for shipment to Victoria. The ruling rates at present are—from Great Britain 30*s*. per ton, from Belgium 35*s*. per ton, measurement. The average rate from Great Britain is from 20*s*. to 25*s*. per ton. The British give longer terms of credit than the Belgians.

27. GLASS.—(*a*) Plate, Rough or Silvered. (*b*) Window.

——	1884.	1889.	1894.
	£	£	£
Total imports - - -	46,061	64,262	6,174
Foreign countries:—			
Belgium - - -	1,154	7,309	1,571
France - - -	—	245	—
Germany - - -	374	358	1,258
United States - -	—	18	—
Total foreign - -	1,528	7,930	2,829

Estimate of Imports in 1894.

		£
Total as above - -	£6,174	
Belgian produce - - - - - -		4,500
German produce - - - - - -		1,258
		5,758

The imports in 1894 were abnormally low. At present there is practically no white window glass in the market but Belgian. The ornamental and coloured glasses are also

all Belgian or German. The British glass has been out of the market for from 15 to 20 years.

(*a*) Price.—Some samples, with prices attached, are forwarded. They are as follows:—

Belgian—Sheet, 26 oz., 21 oz., and 16 oz.; ornamental, blue, and ruby.

The price of British glass some time ago was about 33 per cent. greater than that of the Belgian, but the difference has been gradually narrowing, till at the present time it amounts to about 8 per cent. only. To regain the trade a further reduction in price will be necessary.

(*b*) Quality.—British glass is superior to Belgian.

(*c*) Suitability.—The standard of quality of British glass is rather too high for this market.

(*d*) Packing.—The Belgians for some time did not pack well, but they have now been successful in packing like the British.

(*e*) Other causes.—Freights at present, from Great Britain, 30*s*. per ton; from Belgium, 35*s*. per ton, by sailing ships. These rates are higher than usual. The British generally have an advantage of about 5*s*. per ton in freight.

The British makers give longer terms of credit than the foreign.

27. GLASS.—(*b*) Flint. (*a*) Blown, Pressed, and Cut.

	1884.	1889.	1894.
	£	£	£
Total imports - - -	46,812	72,593	21,424
Foreign countries:—			
Belgium - -	1,178	4,813	1,226
China - - - -	—	9	—
France - - -	197	1,535	128
Germany - - -	1,687	9,593	4,753
United States - -	1,648	3,125	2,248
Total foreign - -	4,710	18,875	8,357

Estimate of Imports in 1894.

	£21,424	£
Total as above - -		
German produce - - - - - -		7,500
United States produce - - - - -		3,000
Belgian produce - - - - -		4,500
Other foreign produce - - - - -		500
		15,500

The imports in 1894 were abnormally small. The foreign imports consist principally of tumblers and wine glasses from Belgium and Germany, moulded glass dishes, sugar basins, butter dishes, lamp chimneys, shades, and globes, &c., from Germany and the United States. All the glass used for electric lighting is from Germany, and most fancy ornaments from Germany and Bohemia.

A catalogue of American lamp chimneys largely sold in this market, with prices and particulars marked therein, is forwarded with the samples, also some sample chimneys.

Tumblers.—(*a*) Price.—Some samples, with prices attached, are forwarded. The Belgian glass tumblers and wine glasses are of a wide range of qualities, and very cheap. The British tumblers of the inferior grades are dearer than similar Belgian goods. The best tumblers are British, but they are too dear for this market.

In other glassware the relative prices can be judged from the quantities in the market.

(*b*) Quality.—In cut glass British is of good quality for heavy descriptions, but the Belgian diamond-cut glass is of equally good design and workmanship, and very cheap.

The moulded and pressed glassware of Great Britain in this market is not equal either to the United States or the German. It is of comparatively bad colour, and wanting in the clearness of the United States glass, and is clumsier looking than the

German or Belgian. The ability of the Americans to make good clear moulded glass has helped them to develop the trade in the plated-ware in which electroplate is combined with glass.

The best lamp chimneys are from the United States, and almost equally good are sent from Germany and Belgium.

Bohemian glass in this market is of the same quality as elsewhere.

(*c*) Suitability.—British glass is not unsuitable, but the kinds sent do not fill the requirements of the market. Foreigners in many lines have no competitors in Great Britain.

(*d*) Packing.—Packing is a very important matter with all glassware, but in most descriptions the British is as well packed as any other. In regard to lamp glasses and some other glassware, which is dutiable by measurement, the American packing is superior, inasmuch as the goods are packed in a smaller compass. The heavy duty that has to be paid on British loosely-packed chimneys is a potent factor in keeping them out of the market.

(*e*) Other causes.—The rates of freight under the heading "No. 24 (*a*) Earthenware," apply to glassware.

Scent Bottles, which are included under this heading, must be treated separately.

(*a*) Price.—Two samples of German bottles are forwarded. The prices are 8*s.* per gross, landed in Melbourne, in bond, for the larger bottle, and 3*s.* 3*d.* and 3*s.* 8*d.* for the two-dram bottle, the latter price including the mould for a first order. The invoice price of these is, for the larger bottle, 6*s.* per gross, and for the smaller 21*s.* 6*d.* and 24*s.* per 1,000. The price of an English bottle (sample forwarded) of somewhat similar size to the larger German bottle is said to be about 6*s.* per gross in England, but they are not imported.

(*b*) Quality.—The English bottle is not comparable to the German bottle. The style is not that which is required here. The fixed mould leaves an unsightly mark, and the tooled lip is clumsy looking. The German bottle is, on the other hand, well finished, apparently in a revolving mould, and the lip is made by a superior process.

(*c*) Suitability.—The German bottle is much the more suitable for the trade here.

(*d*) Packing.—The German bottles are much better packed; they are enclosed in straw envelopes, end to end, and occupy a very small space. This is important, as the duty is by measurement. The sample of two-dram bottles enclosed exemplifies the method of packing.

27. GLASS.—(*b*) Flint. (*b*) Medicine Bottles.

——	1884.	1889.	1894.
	£	£	£
Total imports - - -	—	2,764	799
Foreign countries:—			
Germany - - -	—	69	20
United States - - -	—	160	173
Total foreign - -	—	229	193

Estimate of Imports in 1894.

The above table fairly represents the countries of produce.

Nearly all medicine bottles for use in Victoria are made locally, but a few of excellent quality are from time to time imported from the United States.

The importations from Great Britain consist almost entirely of bottles of under 4 ozs.

28. GREASE, TALLOW, AND ANIMAL FAT.

——	1884.	1889.	1894.
	£	£	£
Total imports - - -	1,126	2,079	677
Foreign countries:—			
United States - - -	342	821	592
Total foreign - -	342	821	592

Estimate of Imports in 1894.

The above table correctly represents the country of produce.

Tallow and animal fat are not imported; the local production being much greater than the demand.

There is now no British trade in antifriction grease, but a small quantity is imported from the United States.

(*a*) Price.—6*s*. 9*d*. to 7*s*. per dozen reputed 2-lb. tins, but which contain about 1½ lbs.

(*b*) Quality.—The United States grease is of fine soft quality and of light colour. It is evidently made from resin oil, but from its light appearance it appears possible that some other mineral oil is used in limited quantities.

(*c*) Suitability.—This grease is suitable for a limited demand, but the home product commands nearly all the market.

(*d*) Packing.—The United States' tins are neat, and the casing is good.

(*e*) Other causes.—The freight is about 27*s*. per ton from New York; from Great Britain it would probably be somewhat less in equal sailing vessels.

29. HABERDASHERY AND MILLINERY.—(*a*) Haberdashery.

——	1884.	1889.	1894.
	£	£	£
Total imports - - -	362,319	383,837	237,034
Foreign countries :—			
Belgium - - -	264	301	264
China - - - -	—	141	10
France - - -	3,277	3,595	2,316
Germany - - -	710	10,136	11,254
United States - -	2,283	1,385	332
Total foreign - -	6,534	15,558	14,176

Estimate of Imports in 1894.

	£237,034	£
Total as above - -		
Belgian produce - - - - - -		1,500
French produce - - - - -		8,000
German produce - - - - -		40,000
United States produce - - - -		1,000
Other foreign produce - - - -		5,000
		55,500

This is a miscellaneous heading which contains many articles which might not in all countries be classed as haberdashery, such as mohair braids, woollen and worsted yarns, doilies, &c., and many other small goods. Of what is strictly termed haberdashery very little is foreign, the principal items being buttons, dress trimmings, hooks and eyes, and hair-pins.

Woollen and Worsted Yarns.—The standard yarns for hand knitting and manufacturing are Br[illegible]ly; the Berlin fingering, Andalusian, Shetland, and fancy descriptions are nearly a[illegible]

(*a*) Price.—A sa[illegible]e of coloured fingering, of which the price is 9*s*. 10d. per 4-lb. spindle landed in Victoria, is enclosed. Also a sample of white, of which the price is 2*s*. 1*d*. per lb. wholesale in Victoria; and a card of Andalusian wools, with prices marked thereon varying from 2*s*. 3½*d*. to 2*s*. 7½*d*. The German fancy wools are lower in price than the British of the same quality.

(*b*) Quality.—The German wools are of good quality and of superior rich shades of colour. Wools of equal quality are occasionally sent from Great Britain, but the prices are higher.

(*c*) Suitability.—These goods are of the description required in the market.

(*d*) Packing.—This item is not affected.

(*e*) Other causes.—Not of importance.

Mohair Braids.—75 per cent. of the mohair braids imported are of German manufacture; but the foreign article is said to be made of British yarn.

(*a*) Price.—Some samples, with the prices attached, are forwarded.

(*b*) Quality.—The range of qualities is equal; but the German goods are cheaper than British of the same quality.

(*c*) Suitability.—The British and foreign manufactures are equally suitable.

(*d*) Packing.—There is no difference in this respect.

(*e*) Other causes.—Not important.

Doilies, Sideboard Cloths, and Similar Goods.—Austrian manufacturers have obtained a very considerable portion of the trade in these goods.

(*a*) Price.—Some samples, with prices attached, are forwarded. The Austrian goods are cheaper than British of similar quality.

(*b*) Quality.—The Austrian goods are of a good range of suitable qualities.

(*c*) Suitability.—The designs and patterns are suitable.

(*d*) Packing.—The boxing and general get-up of the Austrian goods is excellent.

(*e*) Other causes.—The British have an advantage equal to the carriage from Austria to London, where the goods are generally bought.

Buttons.—The bulk of the importations are British. The Germans make metal, linen, and fancy buttons. Some Japanese white shirt buttons, very cheap, have lately been introduced.

(*a*) Price.—Some samples of fancy buttons, with prices attached, are forwarded. In the particular lines in which the Germans compete their prices are lower.

(*b*) Quality.—The quality of the German goods is satisfactory.

(*c*) Suitability.—The goods are suitable.

(*d*) Packing.—Not important. The fancy buttons are generally well carded.

(*e*) Other causes.—Not important.

Dress Trimmings.—The beaded jet and other similar trimmings imported are mostly German. Some of the best are made in France. There is a very considerable importation.

(*a*) Price.—The price of the foreign trimmings, quality for quality, is lower than that of the British. Some samples, with prices attached, are forwarded.

(*b*) Quality.—The German and the French goods are of better quality than the British; they are better finished and got up. It is the cheaper and worse lines that are imported from Great Britain.

(*c*) Suitability.—The foreign goods are most suitable for the greater part of the trade.

(*d*) Packing.—The boxing and general get-up of the foreign goods is superior.

(*e*) Other causes.—Not important.

Hooks and Eyes and Hair-pins.—One Austrian manufacturer more than competes with the British in these goods, and there are some German hooks and eyes imported. Samples with prices attached are forwarded.

29. Haberdashery and Millinery.—(*b*) Millinery, viz., Artificial Flowers.

——	1884	1889.	1894.
	£	£	£
Total imports - -	9,195	16,224	15,534
Foreign countries:—			
France - - - -	—	347	252
Germany - - -	241	59	184
Total foreign - -	241	406	436

Estimate of Imports in 1894.

	£15,534	£
Total as above		
French produce		8,000
German produce		1,500
Other foreign produce		1,000
		10,500

The more artistic are French; the lower qualities are British.
It is impossible to make a comparison of prices and qualities in this item.

29. HABERDASHERY AND MILLINERY.—(*c*) Millinery, viz., Ornamental Feathers.

——	1884.	1889.	1894.
	£	£	£
Total imports	15,926	9,900	11,271
Foreign countries:—			
France	—	237	139
Germany	500	—	34
United States	—	20	—
Total foreign	500	257	173

Estimate of Imports in 1894.

	£11,271	£
Total as above		
French produce		3,000
Other foreign produce		200
		3,200

(*a*) Price.—Too various to quote.
(*b*) Quality.—The French are more artistic.
(*c*) Suitability.—The imports are suitable.
(*d*) Packing.—Equal.
(*e*) Other causes.—Not important.

30. HARDWARE AND CUTLERY.—(*a*) Axles, viz., Common Nut.

——	1884.	1889.	1894.
	£	£	£
Total imports	1,886	3,350	750
Foreign countries:—			
United States	1,313	3,112	727
Total foreign	1,313	3,112	727

Estimate for 1894.

The above table correctly represents the country of produce.
Nearly the whole supply is made in the Colony.
(*a*) Price.—The price of imported common nut axles is about 10*s.* per set of four here without the duty for 1¼-in., and in proportion for larger sizes.
(*b*) Quality.—The quality of the United States axles is good.
(*c*) Suitability.—They suit the trade.
(*d*) Packing.—Satisfactory.

(*e*) Other causes.—The United States having a very large home market to supply, the articles are made in large factories very cheaply. It is said that the common nut axle, 1¼-in., can be produced in America for 6*s.* 4*d.* per set.

There are no British common nut axles in the market for comparison.

30. HARDWARE AND CUTLERY.—(*b*) Axles, viz., Mail Patent.

——	1884.	1889.	1894.
	£	£	£
Total imports - - -	2,027	1,057	2,929
Foreign countries:—			
United States - - -	—	7	58
Total foreign - -	—	7	58

Estimate.

The above table correctly represents the countries of origin.

The table includes half-patent axles.

The mail patent imported are all of British make, and there is no competition. The small quantity set down as from the United States consists of half-patent, but nearly all of this kind are made in the Colony.

(*a*) Price.—The prices of half-patent are—1-in., 6*s.* per set of four; 1¼-in., 8*s.* 6*d.* per set of four, landed in Victoria without duty.

(*b*) Quality.—Good.

(*c*) Suitability.—They are suitable.

(*d*) Packing.—They are well packed.

(*e*) Other causes. — The remarks in regard to common nut axles apply to these.

All other axles, viz.:—Drabble's axles, Colling's axles, and dray axles, are British. The value of the importations is about 6,000*l.* per annum, and this sum is not included in the return.

30. HARDWARE AND CUTLERY.—(*c*) Brassfoundry.

——	1884.	1889.	1894.
	£	£	£
Total imports - - -	18,396	45,434	7,156
Foreign countries:—			
Belgium - - - -	—	—	36
France - - - -	—	243	—
Germany - - -	17	928	20
United States - - -	286	493	108
Total foreign - -	303	1,664	164

Estimate of Imports in 1894.

		£
Total as above - -	£7,156	
German produce - - - -		300
American produce - - - -		200
		500

Large quantities of brassfoundry are included under other headings.

(*a*) Price.—It is impossible to give a price for the miscellaneous items under this heading. The American brassware, which at one time formed a considerable portion of the imports, is too dear, and is almost displaced by British.

(*b*) Quality.—British and American brassware are generally of good quality. The German in this market may for the most part be described as rubbish. This applies to such small articles as locks, hooks, &c., and not to scientific instruments and similar articles, in which the German manufacturers excel.

(*c*) Suitability.—There is always a certain demand for very cheap goods, and the German product is suitable for this demand. For the principal requirements the British manufactures are suitable.

(*d*) Packing.—German boxing and get-up is superior to the British. Their low-quality goods are got up like British articles of good quality.

(*e*) Other causes.—Not important.*

30. HARDWARE AND CUTLERY.—(*d*) Hollow-ware.

	1884.	1889.	1894.
	£	£	£
Total imports	11,445	16,187	3,173
Foreign countries :—			
Belgium	13	30	—
France	—	35	—
Germany	2	363	—
United States	27	54	2
Total foreign	42	482	2

Estimate of Imports in 1894.

	£25,000	£
Total Imports		
German produce		10,000
United States produce		2,000
		12,000

Stamped-iron hollow-ware is not included in the above table, but is included in the estimate. Much hollow-ware is entered under other headings in Victorian statistics, and consequently there is a large discrepancy between the total value of imports in the table and in the estimate.

Cast-iron hollow-ware is all British produce, whilst fully three-fourths of the enamelled stamped-iron and steel ware is foreign. The foreign enamelled ware is displacing, not only similar British goods, but also cast-iron saucepans, &c., earthenware and tinware.

(*a*) Price.—The price of enamelled ware has fallen, and the consumption is increasing. In a few lines British ware is the cheapest, but in the bulk of the goods the German are lowest in price. American goods are rather too dear for this market. Some samples, with prices attached, are forwarded. A catalogue of German goods, giving illustrations of the goods imported, with the prices and discounts, is also sent with the samples.

(*b*) Quality.—The British and American, which are being displaced, are perhaps better than the German, but the difference is perhaps one of make rather than of quality. The British and American goods are heavier and more substantial, whilst the German goods are light and handy. The German goods are substantial enough for the uses to which they are put.

(*c*) Suitability.—The stamped-iron and steel ware is very suitable to the requirements of this Colony. The manufacture embraces a large number of articles, amongst which may be mentioned baths, dishes, jugs of all kinds, basins, bowls, bed-room ware, trays, and every kind of utensil for culinary work. The designs of the articles are of about equal merit in each country of manufacture.

(*d*) Packing.—There is no important difference in this respect.

(*e*) Other causes.—None of importance. Freight would be an important item on bulky goods of this description, but the German produce has no advantages over the British in this respect.

30. HARDWARE AND CUTLERY.—(*e*) Lamps and Lampware.

——	1884.	1889.	1894.
	£	£	£
Total imports - - -	1,883	4,699	12,520
Foreign countries :—			
Belgium - - -	—	—	240
France - - - -	—	15	18
Germany - - -	45	493	1,444
Other - - -	—	—	7
United States - -	181	480	5,613
Total foreign - -	226	988	7,322

Estimate of Imports in 1894.

	£
Total as above - - £12,520	
United States produce - - - - -	9,000
German produce - - - - -	2,000
	11,000

Nearly all household lamps are foreign, but the British have the trade in carriage lamps. The German trade consists partly of burners for British lamps. These burners give a superior light and are cheaper than British. The Germans also supply nearly all the chimneys and globes, but these, when sent separately, are included in this return under the heading of "Glassware."

(*a*) Price.—In price the American lamps are cheapest for the quality. The range of patterns is so great that exact prices cannot be quoted for all; but two catalogues of the American makers whose lamps are most largely sold, with the patterns most favoured marked, and with the prices and discounts stated, are forwarded with the samples.

(*b*) Quality.—British lamps are of too high a standard for sale here. Lately, some cheap British lamps have been offered, which can very nearly compete with German and United States goods.

(*c*) Suitability.—The American lamp is suitable to this market, and hence its success. The models are of great variety, and specially suited to this market. Many inventions have helped to increase the United States trade. The centre draught was one of these, and the clinched instead of the cemented collar finds favour here. The pressed glass lamps from the United States are an important line, and lately the same country has sent here nickel lamps of the class shown in the larger of the before-mentioned catalogues, which are above all competition. They give a brilliant light, and are sold at very moderate prices.

(*d*) Packing.—The United States goods are much better packed; each lamp is in a separate cardboard box, for which no extra charge is made, and they are placed a dozen in a case, or some suitable number for selling by the package.

(*e*) Other causes are not important. United States lamps cost about 27*s.* per ton freight from New York by sailing ship, whilst British goods by similar vessels would generally cost rather less; but the British are nearly all sent by steamers, in which the freight is higher. The Germans have no special advantages in freights.

30. HARDWARE AND CUTLERY.—(*f*) Nails, Iron and Steel, viz., Horseshoe.

——	1884.	1889.	1894.
	£	£	£
Total imports - - -	6,574	3,488	1,227
Foreign countries :—			
Belgium - - -	—	130	—
China - - - -	238	—	—
France - - -	79	50	—
Germany - - -	95	698	578
United States - - -	413	445	63
Total foreign - -	825	1,323	641

Estimate of Imports in 1894.

	£1,227	£
Total as above		
Swedish produce		586
German produce		578
United States produce		63
		1,227

Since 1894 the imports from Germany have ceased, and the supply has been from British houses manufacturing, it is believed, in Sweden.

The price free on board in London is—

	s.	d.	
No. 5	10	0	per box of 25 lbs.
„ 8	7	2	„ „
„ 10	6	4	„ „
„ 11	6	0	„ „
„ 12	6	0	„ „

The cost to land in Melbourne is about 15 per cent.; and they are quoted here wholesale at 5*d.* to 6*d.* per lb. The local manufacture has command of the market.

30. HARDWARE AND CUTLERY.—(*g*) Nails, Iron and Steel, viz., other Nails.

——	1884.	1889.	1894.
	£	£	£
Total imports	37,608	43,309	1,979
Foreign countries:—			
Belgium	2,488	6,503	144
Germany	1,376	8,535	291
Norway	—	9	—
United States	2,428	1,237	74
Total foreign	6,292	16,284	509

Estimate of Imports in 1894.

	£1,979	£
Total as above		
Belgian produce		200
German produce		300
United States produce		300
		800

Nearly all nails are now made in the Colony, but a few small sizes and special kinds are imported. The principal item is tacks.

(*a*) Price.—Samples of American tacks are forwarded, of which the prices are:—Cut tacks, blued, 6½*d.* per dozen packages, free on board, New York; carpet tacks, blued, 9½*d.* per dozen packages, free on board, New York: steel carpet tacks, 10½*d.* per dozen barrels, free on board, New York. These prices are no less than those of the British, which they have almost displaced.

(*b*) Quality.—There is not much difference in quality. The United States are slightly sharper than the British.

(*c*) Suitability.—About equal.

(*d*) Packing.—It was by superiority of putting up alone that the United States gained the market. For a long time the United States makers put their tacks in cardboard boxes, whilst the British put theirs in paper packages. The former style was, and is, preferred. Some British tacks are now put up in cardboard boxes, but the market has to be won again. The Americans are now putting tacks in extremely handy turned wooden barrels of the description shown in the samples. It is very probable that tacks so put up will displace all others.

(*e*) Other causes.—Not important.

30. HARDWARE AND CUTLERY.—(*h*) Tinware.

	1884.	1889.	1894.
	£	£	£
Total imports - - -	5,500	6,972	990
Foreign countries:—			
Belgium - - -	—	6	—
France - - - -	—	38	—
Germany - - -	28	75	18
United States - - -	96	181	336
Total foreign - -	124	300	354

Estimate.

The above table is a correct indication of the countries of produce.

The small amount of foreign tinware imported cannot be traced in the market. Nearly all tinware is of local manufacture.

30. HARDWARE AND CUTLERY.—(*i*) Cutlery.

	1884.	1889.	1894.
	£	£	£
Total imports - - -	29,258	36,249	24,688
Foreign countries:—			
Belgium - - -	22	144	162
China - - - -	—	34	2
France - - -	—	361	6
Germany - - -	157	2,627	1,664
United States - -	135	247	181
Total foreign - -	314	3,413	2,015

Estimate of Imports in 1894.

		£
Total as above - -	£24,688	
German produce - - - - - -		2,500
Other foreign produce - - - -		2,000
		4,500

The trade is believed to be returning to Great Britain. At one time the foreign articles in the market were much more numerous than now.

The items in which there is foreign competition are tailors' scissors, scissors, cheap pocket knives, and razors.

Tailors' Scissors.—This is a small item in which the United States hold the trade, because they make a better-shaped article.

Scissors.—The imports of these are nearly all German.

(*a*) Price.—Some samples are forwarded, of which the prices are respectively 3*s.* 8*d.* per dozen and 10*s.* 6*d.* per dozen, free on board in Hamburg. A wholesale price here cannot be quoted. British scissors of equal quality are dearer. Samples of barbers' scissors of British and American make, with the prices attached, are also forwarded.

(*b*) Quality.—British scissors are superior to German. Most of them are too high-priced for the demand. In the lower qualities the Germans can give better value for the price. The German scissors are of superior finish to British goods of equal intrinsic worth.

(*c*) Suitability.—The German scissors are of the same patterns as British, and consequently as suitable. The superiority of the shape of American barbers' scissors will be at once apparent on examination of the samples.

(*d*) Packing.—No important difference.

(*e*) Other causes.—Not important.

Pocket Knives.—All the better class of pocket cutlery is British, but the lower classes are unbranded, and their place of manufacture is not known here. No comparison of prices or quality is therefore possible. It is generally believed that the low qualities are German.

(*e*) Other causes.—It is confidently asserted that German pocket knives and other small articles of a similar description are sent into Great Britain unbranded, and that they are there carded or boxed with the names of British firms on the cards or containers to deceive the public. If this could be proved, the importation would be prohibited here under the Victorian *Trade Marks Act* 1890, but it will be recognised that detection and proof are extremely difficult.

Razors.—A considerable quantity of German razors are imported, but the trade is falling. The German razors are of nearly the same range of qualities and prices as the British.

The cutlery from the United States consists principally of novelties, such as serrated-edged bread knives.

Secateurs are sent from Germany and Switzerland. Samples, with prices attached, are enclosed.

30.—HARDWARE AND CUTLERY.—(*j*) Bolts and Nuts.

——	1884.	1889.	1894.
	£	£	£
Total imports - - -	14,861	18,628	1,704
Foreign countries:—			
Belgium - - - -	452	1,701	18
Germany - - -	—	—	419
United States - - -	3,883	1,402	332
Total foreign - -	4,335	3,103	769

Estimate of Imports in 1894.

		£
Total as above - -	£1,704	
German produce - - - - -		600
United States produce - - - -		700
Other foreign produce - - - - -		50
		1,350

In a normal year the imports would be of about 15,000*l.* value, a larger proportion of which would be British, but in 1894 nearly all works had stopped.

(*a*) Price.—An assortment of samples of foreign bolts is forwarded, together with a price list, with the discounts correctly stated.

(*b*) Quality.—The quality of the United States bolts for some purposes surpasses that of the British. The British bolts of lower qualities for different work are imported in considerable quantities when trade is in a normal condition, but local manufacture has command of the market.

(*c*) Suitability.—For carriage building and all the better descriptions of work the American bolts are very suitable.

(*d*) Packing.—No important difference.

(*e*) Other causes.—Not important.

30. HARDWARE AND CUTLERY.—(*k*) Castings.

——	1884.	1889.	1894.
	£	£	£
Total imports - - -	12,089	21,860	614
Foreign countries:—			
Germany - - -	—	53	—
United States - - -	156	701	41
Total foreign - -	156	754	41

Estimate of Imports in 1894.

The above table correctly represents the countries of produce.

Small castings are not included in the above, but are dealt with under the heading of "Hardware—Other."

The small quantity which was imported from America in 1894 cannot be traced or described. There is no regular foreign trade.

HARDWARE AND CUTLERY.—(*l*) Other.

	1884.	1889.	1894.
	£	£	£
Total imports - - -	344,696	678,262	165,245
Foreign countries :—			
Belgium - - -	284	8,903	1,469
China - - -	162	315	167
France - - -	316	976	836
Germany - - -	3,126	12,952	10,996
Other - - - -	—	—	107
United States - - -	35,742	51,154	38,799
Total foreign - -	39,630	74,300	52,374

Estimate of Imports in 1894.

	£
Total as above - - - £165,245	
Belgian produce - - - -	4,000
French produce - - - -	1,000
German produce - - -	24,000
United States produce - - -	45,000
Other foreign produce - - - -	2,000
	76,000

This heading includes small tools, the value of which cannot be separately given; it has therefore been found necessary to deal with these tools in this place instead of under heading "32. Implements and Tools of Industry."

Axes are practically all from the United States.

(*a*) Price.—Two samples are forwarded, with the prices attached. The price free on board in New York is 38*s*. 8*d*. for a case containing an assortment of one dozen handled axes of weights ranging from 4½ lbs. to 6 lbs. The price in Victoria is quoted at 52*s*. per dozen for moderate-sized parcels.

(*b*) Quality.—The United States axes are of excellent quality and finish. British axes which have been in this market are perhaps as good, but they are not so well finished, nor of such good appearance.

(*c*) Suitability.—The American axes are suitable for this trade, probably for the reason that the conditions here are somewhat similar to those of the United States. The shape of the axe when first introduced secured the whole market, and the trade has ever since been American.

(*d*) Packing.—The axes are generally packed one dozen in a case of assorted sizes, ranging from 4½ lbs. to 6 lbs.; the blades being wrapped in brown paper. This packing is approved. No extra charge is made for the case.

(*e*) Other causes.—Freight. The freight is from 20*s*. to 27*s*. per ton from New York in sailing vessels.

The high reputation of the American manufacturers is a principal cause of the trade with the United States.

The English have not made any very serious attempts to displace the foreign goods.

Spades, Forks, and Shovels.—Hitherto the United States has held this trade, but there are now British goods in the market, especially spades.

(*a*) Price.—The wholesale prices in Victoria are:—Spades, 2*l.* to 2*l.* 10*s.* per dozen; forks, 1*l.* 4*s.* per dozen; shovels, L.H.R.P., No. 3, 33*s.* to 44*s.* per dozen; shovels, D.H.R.P., No. 3, 35*s.* to 44*s.* 6*d.* per dozen.

Samples are forwarded of a four-pronged manure fork, 18*s.* per dozen, free on board in New York, and which is sold wholesale here at 26*s.* per dozen; an 8-tine sluice fork, of which the makers' price is 2*s.* 7*d.* each, and the cost, landed in Victoria, 3*s.* 2*d.* each. Also a D-handled round-pointed shovel, 28*s.* per dozen in New York, 35*s.* per dozen in Victoria. This is the miner's shovel, an important article; and a long-handled shovel, of which the makers' price is 2*s.* 9*d.*, and the cost, landed in Victoria, 3*s.* 3*d.* each.

It is stated here that the British goods of similar quality in the market are lower in price than the United States articles.

(*b*) Quality.—The American goods are of good standard quality and reliable. The British are said to be of equal quality.

(*c*) Suitability.—Both British and United States goods are the shapes required.

(*d*) Packing.—There is no important difference in this respect.

(*e*) Other causes.—The United States goods hold the market owing to the high reputation of a few manufacturing firms. They will be hard to displace. Freight, 20*s.* to 27*s.* per ton by sailing ship from New York.

Saws.—The trade is mostly in the hands of one or two American manufacturers.

(*a*) Price.—The varieties are too numerous to quote. A sample is forwarded of the most commonly-used hand-saw, the price of which is 51*s.* 8*d.* per dozen, free on board in New York, and the wholesale price in Melbourne is 65*s.* per dozen.

(*b*) Quality.—The quantity of United States saws is good; better than that of the British.

(*c*) Suitability.—Every description and variety of pattern is sent.

(*d*) Packing.—See remarks below under this heading.

(*e*) Other causes.—The United States trade is due to the reliability of the goods and the reputation of the makers. Freight.—As for axes, spades, &c., above.

Hammers.—Eighty per cent. are from the United States, and the remainder from Great Britain. Great Britain supplies engineers', smiths', and quarry hammers.

(*a*) Price.—Three samples of the United States claw-hammers in most general use are forwarded. The prices are—for the best quality 14*s.* 8*d.* per dozen, and for the second quality 10*s.* per dozen, free on board at New York. The wholesale prices in Melbourne are respectively about 19*s.* and 13*s.* 6*d.* per dozen. British hammers, considering their quality, are much dearer.

(*b*) Quality.—The British hammers sent here are very inferior to those from United States.

(*c*) Suitability.—The United States hammer is much better shaped, a better curve for using the claw. It is also handled on a different and much better principle. The British side-straps prevent re-handling, whilst the American method admits of the easy removal of the old and substitution of a new handle. Some British hammers handled on the adze eye principle are now in the market.

(*d*) Packing.—See remarks below.

(*e*) Other causes.—Not important.

Screw-drivers.—About 50 per cent. of United States and 50 per cent. of British are imported.

(*a*) Price.—Samples of the former, with prices attached, are forwarded. For this particular description, which is in most common use, the price is 8*s.* per dozen, free on board in New York. A Melbourne wholesale price cannot be quoted, but it would be about 33 per cent advance on the New York price.

(*b*) Quality.—The quality of British and United States is about equal.

(*c*) Suitability.—The American is of rather better appearance; the black handles are no doubt attractive to some buyers, and to conserve the whole trade some portion of the assortment offered should be black-handled.

(*d*) and (*e*) Not of importance.

Files.—More than half the importations are British, the remainder being nearly all United States.

(*a*) Price.—Of two representative lines, of which samples are forwarded, the prices are as follows:—8-in. mill saw files, 2nd cut, 3*s.* 9*d.* per dozen; 4½-in. taper saw file, 2nd cut, 1*s.* 6½*d.* per dozen, free on board in New York. The Melbourne wholesale price is about 30 per cent. higher.

(*b*) Quality.—Both British and American are of good quality.

(*e*) Other causes.—The trade in files seems naturally to follow that in saws. The American files are made by the saw-makers, who have displaced, to some extent, the British manufacturers.

Planes.—There is no competition between goods of the same description in this market, the wooden planes being British and the iron planes United States.

Wrenches.—The greater part are from the United States. Some samples, with prices attached, are forwarded.

Chisels and Gouges.—About 90 per cent. of the importations are British, and the British are still further displacing the American manufacturers by reason of the better quality and lower price.

Gimlets and Gimlet Brace-bits.—These are nearly all of German manufacture.

(*a*) Price.—The price of the German goods is low. Some samples are forwarded, of which the prices are as follows:—

	£	s.	d.	
Gimlets, $\frac{4}{32}$-in.	1	1	0	per gross
„ $\frac{6}{32}$-in.	1	2	8	„
Brace-bits, $\frac{8}{32}$-in.	0	1	4½	per dozen

Free on board in Hamburg. A wholesale price in Victoria cannot be quoted.

(*b*) Quality.—The German goods are of fairly good quality.

(*c*) Suitability.—They are suitable.

(*d*) Packing.—The boxing and packing are good. The method of boxing the bits can be seen from the sample.

Auger Bits are British and American. A sample is sent of an American twist drill, ¼-in., of which the price is 5*s.* 10½*d.* per dozen, free on board at New York. This well-known drill is made in all sizes up to ¾ inch, progressing in sixty-fourths of an inch.

Padlocks and Locks.—A considerable quantity are imported from New York.

(*a*) Price.—No sufficiently representative line can be fixed to state a price, except perhaps for the Yale rim night-latch. This latch, of which a sample is sent, is 56*s.* 1*d.* per dozen, free on board at New York, and it is in general use.

(*b*) Quality.—The quality of American locks and padlocks is not superior to that of the British.

(*c*) Suitability.—The Americans are continually introducing new patterns and making improvements.

(*d*) Packing.—American padlocks are packed in cardboard boxes of dozens and half-dozens, suitable for retail dealers. They also pack in reasonably small cases to suit buyers, and give the case without extra charge when an unbroken quantity is taken.

(*e*) Other causes.—Not important.

Hooks, Hat and Coat.—Nearly all are from the United States.

(*a*) Price.—The prices of three representative samples which are sent are as follows:—

No. 53, 2*s.* 10*d.* per gross
No. 150, 6*s.* 1*d.* per gross } Free on board at New York.
No. 22, 7*s.* per gross

(*b*) Quality.—Good. They are better finished than the British.

(*c*) Suitability.—They are suitable.

(*d*) Packing.—No important difference.

(*e*) Other causes.—Not important.

Hinges and Small Castings.—Nearly all the trade is with the United States. A large variety of articles is included under this heading, such as pulleys, window fittings, handles, &c. Some British makers are now copying the superior American patterns with success.

(*a*) Price.—The American goods are cheaper than British of equal quality.

(*b*) Quality.—The manufacture of small castings is a United States speciality, and the quality is unrivalled; the finish is excellent.

(*c*) Suitability.—There is a sufficient variety of patterns and styles.

(*d*) Packing.—These goods are all well boxed and packed. Many that are put up in paper packages in Great Britain are boxed in America. The American method is preferred.

(*e*) Other causes.—Not important.

Trowels.—Plasterers' trowels are for the most part from the United States.

(*a*) Price.—The price of the sample forwarded is 36*s.* per dozen, free on board at New York.

(*b*) Quality.—The quality is good, but not superior to British.

(*c*) Suitability.—The American trowel is preferred on account of its lightness and handiness.

(*d*) Packing.—No important difference.

(*e*) Other causes.—Not important.

Lawn Mowers.—The American have displaced the British, which at one time were plentiful in the market.

(*a*) Price.—The United States lawn mower is about one-quarter the price of the British. The sample forwarded is a 10-in. machine of simple construction, worth 8*s.* free on board at New York.

(*b*) Quality.—British machines are far superior to United States in workmanship, but the latter are good enough for the requirements of the people.

(*c*) Suitability.—The United States mower is much the more suitable for this market by reason of its simplicity of construction and its lightness to handle.

(*d*) Packing.—No important difference.

(*e*) Other causes.—Freight is of importance on this article. The American machines are carried by sailing ships, at rates ranging from 20*s.* to 27*s.* per ton.

Wirework Goods.—The United States first introduced to this market a number of novelties in the shape of household and other articles made of wire which had previously been made of other materials. These goods achieved an immediate and complete success. The Germans are now copying the patterns and inventions of the Americans, and offering their goods in this market at a lower price. British manufacturers have not sent here any goods embodying the useful American ideas. A catalogue, giving illustrations of these German goods with the prices and discounts, is enclosed with the samples.

Bird Cages are all American. They are made with interchangeable parts, in order that each part may be packed separately, and so avoid heavy charges for inland railway carriage and freight. They are also specially made to fit into one another or "nest"; the freight on one cage carries four. They have studied methods of packing much more closely than have the British. A slip, giving illustrations of bird cages imported, with the prices marked thereon, is sent with the samples.

Saddlers' Ironmongery.—The importations are British, and the item is mentioned here only to point out that the trade would prefer the goods packed in cardboard boxes instead of in paper parcels. A wrong method of packing is a continual source of danger.

Hardware generally.—(*d*) Packing.—The United States packing is generally superior to the British. Large quantities of small articles, which in Great Britain would be put in paper parcels, are in America contained in cardboard boxes, and even when such goods are boxed in Great Britain the boxes are neither so sightly nor so strong as the American. In looking round the shelves of hardware stores the British boxes can be picked out by their want of style and the greater number of broken corners. The United States has undoubtedly pushed forward its trade in hardware largely by the excellence of the get-up of the goods. They prepare them in such a way that they look well on the shelves of the store of a retailer, which is a matter of importance. As they are generally packed on the shelves with the ends outwards, the Americans put a description of the goods on the ends as well as on the top or sides. The Americans also put the importer to less expense for outside packing. The cases they use are cheaper and lighter; they are rougher than British, but as effective; and the system of lining with prepared paper instead of with sheet-metal is generally approved. It is the experience of importers that the goods arrive here from America as free from damage as from London, notwithstanding the fact that they have to bear a long sea voyage by sailing ship. American cases are generally smaller than British; this is an advantage in itself. In many instances the cases are specially designed for trade purposes—that is, the correct quantity to form a unit of a saleable quantity is put in one package. The British have not to any great extent adopted this useful idea.

The British have little to learn from the Germans in packing hardware except the attractive getting up of cheap goods. German cases are not equal to British; they are too large and too weak.

32. IMPLEMENTS AND TOOLS OF INDUSTRY.—(*a*) Agricultural Implements, other than Reapers and Binders.

——	1884.	1889.	1894.
	£	£	£
Total imports - - -	33,015	43,405	19,212
Foreign countries:—			
Belgium - - -	155	—	—
Germany - - - -	105	214	12
United States - - -	2,697	2,002	3,484
Total foreign - -	2,957	2,216	3,496

Estimate of Imports in 1894.

	£19,212	£
Total imports as above - -		
United States produce - - - - -		12,000
Other Foreign produce - - - - -		500
		12,500

Small tools are dealt with under the heading of "Hardware—Other." The principal supply of agricultural implements is manufactured locally.

The United States implements imported are of different descriptions to the British, and there is little competition in any given article. The British send to this Colony a few ploughs, harrows, chaffcutters, oat-crushers, and horseworks. The United States send practically all others, amongst which may be mentioned drilling, hoeing, raking machines, either single or combined, and all descriptions of cultivators.

(*a*) Price.—No prices can be given, as the machines are imported by retailers, and the cost landed in Victoria is not available. It is known, however, that they are sold at a large advance on the cost price.

(*b*) Quality.—American machines are of fair quality.

(*c*) Suitability.—American machines are very suitable to this Colony, where the conditions are somewhat the same as in America. They are light and very ingeniously constructed, and they contain many patents.

(*d*) Packing.—No important difference.

(*e*) Other causes.—Freight is a considerable item on agricultural implements. The rate from New York is from 20*s.* to 27*s.* per ton. By sailing ships they could generally be sent at a lower rate from Great Britain.

32. IMPLEMENTS AND TOOLS OF INDUSTRY.—(*b*) Reapers and Binders.

——	1884.	1889.	1894.
	£	£	£
Total imports - - -	46,285	67,279	16,345
Foreign countries:—			
Germany - - - -	—	545	—
United States - - -	36,324	37,909	5,788
Total foreign - -	36,324	38,454	5,788

Estimate of Imports in 1894.

	£16,345	£
Total as above - -		
United States produce - - - - -		10,000

An English and two or three Canadian and United States firms send reapers and binders to Victoria.

(*a*) Price.—Single machines sell at 45*l.* to 50*l.*, which is known to be a great advance on the cost price. This, however, covers a contract to keep in order for a certain time. The invoiced price is from about 17*l.* 10*s.* to 22*l.* 10*s.* There is no quotable wholesale price, as importers sell single machines.

(*b*) Quality.—The British machine is perhaps the better, but there is not much difference.

(*c*) Suitability.—The machines are in close competition at agricultural shows and elsewhere, and the success achieved is about equal.

(*d*) Packing.—There is no material difference in this respect.

(*e*) Other causes.—Freight, on the whole, is cheaper from Great Britain than from the United States, whilst the British have the advantage of being able to send by steamers if necessary. British and Foreign firms have shown great energy in extending their business, and the expenses of agents, advertising, &c., has, of course, to be borne by the users. A great discrepancy has thus arisen between the cost price and the selling price. A manufacturer who could sell in Victoria at a reasonable advance on the cost price would confer a benefit on the Colony.

32. IMPLEMENTS AND TOOLS OF INDUSTRY.—(*c*) Sewing Machines.

——	1884.	1889.	1894.
	£	£	£
Total imports - - -	87,533	61,906	27,218
Foreign countries:—			
Belgium - - - -	26,638	1,553	2,804
France - - - -	—	17	—
Germany - - - -	1,339	8,194	3,403
United States - - -	12,160	26,836	17,030
Total foreign - -	40,137	36,600	23,237

Estimate of Imports in 1894.

	£27,218	£
Total as above - -		
German produce - - - - - -		7,000
United States produce - - - - -		18,000
		25,000

This Colony is supplied principally by one large company, which has factories both in the United States and Great Britain. The supply for this Colony comes from the United States, except in regard to boot-sewing and carpet-sewing machines, which are made at the British factory. At one time the machines from the British factory were imported, but the company now finds it more profitable to import from the United States.

(*a*) Price.—There is no wholesale price, as the company's agent sells single machines, but in rather large quantities to manufacturers and others, the prices range from about 5*l.* 5*s.* to 6*l.* 10*s.* each. There has been a great struggle for the business in these colonies, and the consequence is that the retail buyer has to pay heavily for the expenses of advertising, travelling agents, and the great risks taken by agents to secure business. A machine of which the factory cost is, say, 3*l.* 5*s.*, would be sold in Victoria in large numbers at 6*l.*, and retail at 12*l.* A manufacturer who could sell in Victoria at a reasonable advance on the factory cost would confer a great benefit on the Colony.

(*b*) Quality.—The American machines are of well-known standard quality. A German firm has nearly a fourth of the trade. The German article is somewhat similar in pattern to the American, but it is rather more showy. The cabinet work is better looking, but the quality is no better than the American.

(*c*) Suitability.—The American and German articles are of about equal suitability. Such few British machines as are sent out here for bootmaking, &c., are also specially suitable.

(*d*) Packing.—No essential difference.

(*e*) Other causes.—Freight. A large firm, like that of the United States sewing-machine maker, can obtain freight at special rates. They pay as little as 12*s*. 6*d*. per ton from New York at times in chartered sailing vessels. Freights from Great Britain would rarely be less than 20*s*. per ton by sailing ship, and much more by steamer.

33. INSTRUMENTS AND APPARATUS.—(*a*) Surgical and Anatomical.

	1884.	1889.	1894.
	£	£	£
Total imports	10,831	18,983	19,852
Foreign countries:—			
Belgium	—	—	30
France	28	152	57
Germany	35	250	1,104
United States	84	947	1,268
Total foreign	147	1,349	2,459

Estimate of Imports in 1894.

		£
Total as above	£19,852	
German produce		5,000
United States produce		1,500
Other foreign produce		500
		7,000

(*a*) Price.—German articles are much the cheapest, especially for those descriptions of which vulcanite is an important portion.

(*b*) Quality.—The Germans, as a rule, supply the cheaper qualities, but a good many German articles are of superior manufacture, and equal to the best British. The British supply the best cutting instruments.

(*c*) Suitability.—The British maintain their trade by the reliability of their goods. The British name alone causes their sale. If the excellence and cheapness of German goods becomes as well known to private buyers as it is to the importers, it is doubtful if Great Britain will keep the trade. This applies to all instruments and appliances except edged steel articles, in which the British excel. Many of the vulcanite portions of British articles in this market are made in Germany.

(*d*) Packing.—As a rule German articles are better boxed.

(*e*) Other causes.—Not important.

33. INSTRUMENTS AND APPARATUS.—(*b*) Scientific.

	1884.	1889.	1894.
	£	£	£
Total imports	24,115	24,741	4,730
Foreign countries:—			
Belgium	1,351	54	178
France	79	1,046	844
Germany	—	1,849	336
United States	42	82	74
Total foreign	1,472	3,031	1,432

Estimate of Imports in 1894.

	£9,000	£
Total		
German produce		5,000
French produce		1,000
Belgian produce		500
Other foreign produce		200
		6,700

The return does not include electrical instruments, but these have been included in the estimate.

Telephones.—The telephone system in this country is in the hands of the Post and Telegraph Department, and consequently the chief supply is for the Government. After consideration the instrument selected was that of the Societé Générale des Téléphones. The contract prices in Melbourne are as follows:—

Telephones, &c.

(All articles to sample.)

		£	*s.*	*d.*
1.	Telephones—Berthon-Ader combination, with cords (receivers and transmitters) - - - each	1	0	0
2.	Telephones — Magneto, complete, two receivers, Berthon-Ader (other forms to be purchascable, at the option of the Department) - - - per set	3	18	0
3.	Telephone indicator, shutter - - - each	0	4	0
4.	„ switch cords, 3 yards long, with plug - per doz.	0	8	0
5.	„ switch cords, any colour, as required - per 100 yds.	0	10	0
6.	„ weights and pulley - - - per doz.	0	3	0
7.	Lightning arresters, flat plates - - - each	0	5	6
8.	Granulated carbon for Berthon-Ader telephones - per lb.	0	2	0
9.	Telephone cords—Berthon-Ader combination, 7 feet long - - - - per doz.	1	16	0
10.	„ Berthon-Ader combination, 4 feet long - - - - „	1	10	0
11.	„ Ader receiver, 3 feet long - „	0	15	0
12.	Berthon induction coils—Resistance, primary, 1·3 ohms; resistance, secondary ·150 ohms - - „	1	10	0
13.	Telephone diaphragms - - - - „	1	4	0

The resistance of all telephone and other cords not to exceed 1 ohm per yard of cord.

The articles specified by maker's names specially will be required to be supplied; but if during the currency of the contract improvements should be available by any other makers, the Department reserves the option of accepting such articles of other manufacture than that specified.

The Government reserves the right to buy other telephones should improvements be made.

Very few telephones except those for the Government are imported.

Nearly all other scientific instruments, such as theodolites, levels, barometers, and thermometers are British, but there are German goods of all these descriptions of the cheaper qualities in the market.

33. INSTRUMENTS AND APPARATUS.—(*c*) Optical.

	1884.	1889.	1894.
	£	£	£
Total imports - - -	11,559	12,243	6,803
Foreign countries:—			
Belgium - - -	60	54	8
France - - -	926	2,760	543
Germany - - -	40	215	843
United States - - -	—	92	12
Total foreign - -	1,026	3,121	1,406

Estimate of Imports in 1894.

The above table correctly indicates the countries of produce.

Spectacles are nearly all British, but some of the cheaper descriptions are French and German.

Telescopes are nearly all British, but a few of the cheaper articles are French.

Opera-glasses and field-glasses are nearly all French. A few cheap German are imported.

(*a*) Price.—The British spectacles and telescopes are, as a rule, the cheapest down to a certain standard of quality, below which French and German goods are of lower price.

(*b*) Quality.—British goods, except opera and field glasses, are the best. The French opera and field glasses are of high quality, good finish, and tasteful appearance.

(*c*) Suitability.—No important difference.

(*d*) Packing.—No important difference.

(*e*) Other causes.—Not important.

34. LEATHER.—(*a*) Unwrought.

	1884.	1889.	1894.
	£	£	£
Total imports	148,005	167,998	98,322
Foreign countries:—			
Belgium	5,694	2,587	933
France	2,743	10,136	7,223
Germany	1,064	27,528	8,950
United States	10,223	18,394	4,463
Total foreign	19,724	58,645	21,569

Estimate of Imports in 1894.

	£98,322	£
Total as above		
Belgian produce		2,700
French produce		22,000
German produce		24,000
United States produce		6,000
Other foreign produce		6,000
		60,700

Nearly all the leather for bootmaking and saddlery is made in the Colony. The importations consist principally of morocco, glacé kid, calf kid, mock kid, calf, patent calf, Levant goat, patent leather, and fancy leathers. The greater part of these is of Continental manufacture.

Morocco Leather.—In 1894, about 85 per cent. of the trade in furniture morocco was German, but the British trade has since increased. The best quality is now all from England. The German leather looks well, but is not so durable as the British.

Glacé Kid.—The importations are principally from France; a small quantity from Germany, and none from Great Britain.

(*a*) Price.—The range of prices is from 30*s.* to 120*s.* per dozen wholesale in Victoria.

(*b*) Quality.—The qualities are the same as of those sold in Great Britain and elsewhere.

Calf Kid is nearly all of German manufacture.

(*a*) Price.—The range of prices is from 90*s.* to 200*s.* per dozen.

(*b*) Quality.—The German goods imported are of better quality than either British or French.

Mock Kid is imported principally from France.

(*a*) Price.—The range is from 32*s.* per dozen to 57*s.* 6*d.* per dozen.

(*b*) Quality.—The qualities are such as are universally known.

Calf is imported from Germany and France; none is now sent from Great Britain.

(*a*) Price.—The range of prices is from 3*s.* to 6*s.* per lb.

(*b*) Quality.—The Continental calf is of good quality.

Patent Calf is imported from Germany.

(*a*) Price.—The range is from 52*s.* 6*d.* to 120*s.* per dozen.

(*b*) Quality.—The qualities are such as are universally known.

Levant Goat.—The greater part of the skins is imported from Great Britain in a rough-tanned state, and finished in the Colony. The finished article imported is from Germany and Belgium.

(*a*) Price.—The range is from 45*s.* to 70*s.* per dozen.

Patent Leather is imported from the United States principally.

(*a*) Price.—11*d.* to 1*s.* 6*d.* per foot wholesale in Melbourne. Samples, with prices landed in Melbourne and as invoiced from America attached, are forwarded. British prices are by the hide, and an exact comparison cannot be made; they are about 10 per cent. higher than the American.

(*b*) Quality.—Both British and American are of good quality.

(*c*) Suitability.—British hides are smaller than American, which is a disadvantage. They are also too heavy for carriage-makers, by whom the principal part of those imported is used.

Leather generally.—(*d*) Packing.—No marked difference.

(*e*) Other causes.—Freight.—Nearly all Continental leathers are received from London, and consequently foreign countries must be at a disadvantage equal to the cost of carrying from the place of produce to London. The few received direct have no advantage in freight over British goods. United States leathers are often received by way of London, but on those that come direct the freight is from 20*s.* to 27*s.* per ton by sailing ships.

34. LEATHER.—(*b*) Wrought, viz., Boots and Shoes.

——	1884.	1889.	1894.
	£	£	£
Total imports	100,522	147,681	32,972
Foreign countries :—			
China	300	540	95
France	898	2,210	121
Germany	1,572	15,138	1,445
United States	251	209	29
Total foreign	3,021	18,097	1,691

Estimate of Imports in 1894.

	£32,972	£
Total as above		
French produce		600
German produce		3,500
United States produce		500
Other foreign produce		2,500
		7,100
The above is made up of—		
Men's and youths'		4,218
Women's and girls'		12,030
Children's		12,983
Slippers, &c.		3,741

The bulk of the boots used in the Colony is made locally. The descriptions still imported are superior men's and women's of fancy leathers, small children's, and slippers.

In 1894 the British had the greater part of the trade, but since that time United States boots and shoes have been imported in considerable quantities, displacing others. No other competition is of importance. About one-third of the imports are now American.

(*a*) Price.—The range of qualities, descriptions, and sizes is so great that definite prices cannot be given, but it is the cheapness combined with the quality of the American goods which causes their sale. The American boots, in the United States, are sold to factors only in large quantities, and the magnitude of the orders given by these factors enables the manufacturers to make at a minimum cost. In this Colony the American manufacturers relax their conditions to secure the trade, and sell in small quantities to

retailers at nearly the same price as they sell in the United States to the factors. For this reason an American retailer probably pays more for his boots than does a Victorian retailer.

(*b*) Quality.—United States boots and shoes are of excellent quality and finish. In men's boots the leather is softer than British, and the boots are more comfortable to wear. In women's boots the shape and finish are good. None but the best qualities are imported, as no competition with the local factories in other descriptions is possible under present conditions.

(*c*) Suitability.—A wide range of sizes and patterns renders the United States boots and shoes suitable to the market.

(*d*) Packing.—There is no important difference in this respect.

(*e*) Other causes.—Experts here believe that the United States manufacturers make better use of their machinery, and that the cost of making and finishing is much greater in Great Britain than in America. It is said that a pair of men's boots, which would cost 3*s*. 9*d*. to make and finish in Great Britain, would cost 1*s*. 6*d*. in the United States, and that a pair of women's boots, which would cost 3*s*. 6*d*. in Great Britain, would cost 1*s*. in the United States. The spread of the trade is attributed principally to this cause.

34. LEATHER.—(*c*) Wrought of other Sorts. (*a*) Gloves.

	1884.	1889.	1894.
	£	£	£
Total imports	70,500	101,800	66,845
Foreign countries :—			
Germany	11	300	4,128
France	74	5,189	4,287
Italy	15	—	—
United States	—	24	—
Total foreign	100	5,513	8,415

Estimate of Imports in 1894.

		£
Total as above	£66,845	
French produce		36,000
German produce		10,000
		46,000

The British trade is increasing.

(*a*) Price.—Men's heavy calf-skin gloves are cheaper from Great Britain than from France, whilst the lighter kid gloves for ladies' wear, which constitutes the greater part of the trade, are generally cheaper from France than from Great Britain. The German makers have not held their own in the market in regard to price.

(*b*) Quality.—British gloves are held to be more durable than French, whilst the latter are generally preferred for finish and colour.

(*c*) Suitability.—Both French and British gloves are suitable. The fashions here follow the European fashions.

(*d*) Packing.—There is no marked difference in this respect.

(*e*) Other causes.—Not important.

34. LEATHER.—(*c*) Wrought of Other Sorts. (*b*) All other.

	1884.	1889.	1894.
	£	£	£
Total imports	38,891	50,593	9,386
Foreign countries :—			
Belgium	122	21	7
China	—	38	5
France	1,140	891	114
Germany	452	3,063	792
United States	674	2,121	198
Total foreign	2,388	6,134	1,116

Estimate of Imports in 1894.

	£9,386	£
Total as above		
German produce		5,000
French produce		500
United States produce		500
Other Foreign produce		200
		6,200

Most articles of leather are made in the Colony, and the imports consist principally of fancy leather articles, such as purses, ladies' hand-bags, pocket-books, &c. These are bought from British houses, but they are often unbranded, and it is believed that the greater part of them are of German manufacture.

(*a*) Price.—The German goods are cheaper than British of the same quality.
(*b*) Quality.—German leatherware is equal to British in quality.
(*c*) Suitability.—The designs are the same as the British.
(*d*) Packing.—No important difference.
(*e*) Other causes.—The silver mountings of some leather articles evidently made in Germany bear the British Silversmith's Hall-mark. This leads many people to believe that the goods are made in Great Britain, and tends to assist the sale.

34. LEATHER.—(*d*) Saddlery and Harness.

——	1884.	1889.	1894.
	£	£	£
Total imports	4,028	7,330	1,263
Foreign countries :—			
Germany	—	121	21
United States	169	843	347
Total foreign	169	964	368

Estimate of Imports in 1894.

The above table correctly indicates the countries of produce.
The small quantity of saddlery imported from the United States cannot be traced.

37. MACHINERY.—(*b*) Of other sorts.

——	1884.	1889.	1894.
	£	£	£
Total imports	169,534	321,012	51,080
Foreign countries :—			
Belgium	500	21	372
France	35	2,226	—
Germany	5,413	9,675	3,005
United States	10,313	20,734	5,440
Total foreign	16,261	32,656	8,817

Estimate of Imports in 1894.

	£51,080	£
Total as above		
Belgian produce		400
German produce		6,000
United States produce		6,000
Other Foreign produce		5,000
		17,400

Nearly all heavy machinery is made in the Colony, and the bulk of the importations consists of machine tools or household appliances, such as wringers, mangles, &c.

Wringers.—Nearly all the importations are from the United States; a few with iron frames are received from Scotland.

(*a*) Price.—The United States wringers are about half the price of British.

(*b*) Quality.—Good.

(*c*) Suitability.—The machines exactly suit the requirements of this market.

(*d*) Packing.—The United States machines are made flat, especially to pack in cases of half-a-dozen each.

(*e*) Other causes.—Not important.

Boot-making Machinery is nearly all of United States manufacture.

(*a*) Price.—There are no British machines in the market for comparison.

(*b*) Quality.—Good.

(*c*) Suitability.—The United States machines are the more suitable.

(*d*) Packing.—Not important.

(*e*) Other causes.—A great many of the machines are wholly or partly constructed under American patents.

Wood-working Machinery.—The greater part is from the United States. The only British machines in use are lathes, saw benches, gang saws, and log saws, whilst the United States supply lathes, jig saws, band saws, moulding machines, planing machines, door and sash-making machines, sand-papering machines, emery grinders, box-cutting machines, and a variety of others.

(*a*) Price.—Too varied to quote.

(*b*) Quality.—The United States machines are of about equal quality to British.

(*c*) Suitability.—The United States are generally the best adapted for the requirements of this country.

(*d*) Packing.—Not important.

(*e*) Other causes.—Many of the United States machines contain patent parts. Iron-working machines, carding, spinning, and weaving machines, rope-making machines, and printing machines are for the most part British. Milling machines are to a considerable extent of Austrian manufacture. Pumps are nearly all American, and British meat choppers are being superseded by the superior and cheaper American machines illustrated in a catalogue sent with the samples.

38. MANURE.

	1884.	1889.	1894.
	£	£	£
Total imports - - -	1,271	996	1,587
Foreign countries:—			
Belgium - - - - -	—	—	412
Germany - - -	83	620	638
Other - - - - -	12	44	4
Total foreign - -	95	664	1,054

Estimate of Imports in 1894.

	£1,587	£
Total as above - -		
German produce - - - - -		1,050
Other foreign produce - - -		4
		1,054

The imports from Germany consist principally of the products of the Stassfurt salt mines; they contain chloride of sodium, chloride of magnesium, chloride of potassium, sulphate of magnesium, with other matter in varying proportions. A small quantity of superphosphates is also imported from Germany.

(*a*) Price.—The price of the mineral fertilisers varies from 6*l.* 10*s.* to 7*l.* 10*s.* per ton in Germany. The price landed in Melbourne is probably about 8*l.* to 9*l.* On arrival it is sold retail, and there is consequently no wholesale price in Victoria.

(*b*) Quality.—It is the same as the well-known Stassfurt fertilisers sent all over the world.

(*c*) Suitability.—It is suitable for some cultivation in this Colony.

(*d*) Packing.—Not important.

(*e*) Other causes.—The freight and charges are not made known here. It is quite possible that there may be some State assistance given in Germany to the export of mineral manures, but no particulars are obtainable.

39. MEDICINES.—(*a*) Drugs.

	1884.	1889.	1894.
	£	£	£
Total imports	95,523	98,260	77,312
Foreign countries :—			
Belgium	487	1,285	338
China	434	668	216
France	129	280	1,030
Germany	1,278	3,600	5,174
Italy	—	—	365
Japan	—	—	175
United States	879	2,591	929
Total foreign	3,207	8,424	8,227

Estimate of Imports in 1894.

	£
Total as above £77,312	
Belgian produce	1,000
Chinese produce	216
French produce	3,000
German produce	15,000
United States produce	1,000
Other foreign produce	300
	20,516

Quinine.—About two-thirds of the importations are British, and one-third German. German is displacing British.

(*a*) Price.—A quality of quinine which would be 1*s.* 8*d.* per oz. if British would be 1*s.* 6*d.* per oz. if German.

(*b*) Quality.—The range of qualities is equal.

(*c*) Suitability.—Equal.

(*d*) Packing.—See below.

(*e*) Other causes.—Not important.

Chloroform.—About half the importations are German and half British.

(*a*) Price.—British chloroform, best quality, 7*s.* 6*d.* per lb.; German chloroform, ordinary, 3*s.* per lb.

(*b*) Quality.—The German chloroform, like the British, is from makers of the highest repute, and the range of qualities is about equal. The doctors commonly give English chloroform, because of its reliability. The German importations are to meet the requirements of those seeking cheaper goods.

(*c*) Suitability.—See preceding paragraph.

(*d*) Packing.—No important difference.

(*e*) Other causes.—Not important.

Other Drugs.—(*a*) Price.—The price generally of foreign drugs is less than that of British drugs.

(*b*) Quality.—The quality of German drugs is probably equal to that of British.

(*c*) Suitability.—Depends on quality.

(*d*) Packing.—The containers of British drugs are inferior. The bottles are of bad glass, bad colour and shape; the labels are ugly, and are often crookedly put on; the stoppers are unsightly; and the outside wrappers are of the commonest description of

paper. The German drugs, on the other hand, are contained in bottles of clear glass, or of colours suited to the contents; well made, and of good shape. This matter is of importance.

(*e*) Other causes.—The British maintain their trade solely by the high esteem in which the products of a few large makers are held, and the reliability of the goods sent out by them.

39. MEDICINES.—(*b*) Patent.

	1884.	1889.	1894.
	£	£	£
Total imports	29,086	38,639	46,802
Foreign countries:—			
China	—	20	156
France	—	111	283
Germany	—	109	88
United States	3,113	5,598	8,376
Total foreign	3,113	5,838	8,903

Estimate of Imports in 1894.

	£
Total as above	£46,802
United States produce	19,000
Other foreign produce	2,000
	21,000

(*a*) Price.—No comparison is possible.
(*b*) Quality.—Incomparable. The trade does not depend greatly upon the quality.
(*c*) Suitability.—The suitability is shown by the extent of the trade.
(*d*) Packing.—Not important.
(*e*) Other causes.—The sale of patent medicines depends almost entirely upon advertising, and such advertising must be done by the makers, as it pays local chemists to put forward their own compounds rather than British or foreign. The patent medicines in the market are advertised to a great extent, and the cost of this is no doubt paid by an enormous difference between the actual cost of manufacture and the retail price.

40. METALS.—(*a*) Iron. (*c*) Bar, Angle, Bolt, and Rod, viz., Angle.

No statistics are given of this item, because hitherto the foreign importations have been less than 5 per cent. of the total. Angle iron is, however, lately being imported from Germany in considerable quantities in consequence of its cheapness and good quality. It is rolled much straighter, and is said to be superior to British manufacture.

40. METALS.—(*a*) Iron. (*d*) Railroad of all Sorts, viz., Rails.

	1884.	1889.	1894.
	£	£	£
Total imports	129,717	436,184	69,059
Foreign countries:—			
Belgium	2,076	15,511	2,469
France	332	100	5
Germany	50	3,364	1,819
Total foreign	2,458	18,975	4,293

Estimate of Imports in 1894.

The above table indicates correctly the countries of origin.

The railways of this Colony are in the hands of the Government, and all the rails imported in 1894 by the Railway Department were of British manufacture.

The foreign portion of the importations consists of small tram rails for mining purposes, earthworks, &c.

(*a*) Price.—They are quoted at 5*l.* free on board at Antwerp, and 5*l.* 5*s.* for 14 lbs. per yard steel tram rails free on board at London. On arrival they are sold in comparatively small quantities, and, consequently, a wholesale price cannot be quoted.

(*b*) Quality.—The quality is excellent.

(*c*) Suitability.—There is a large and increasing sale for these rails which are especially suited for mining and similar work. The sizes most required are 12 lbs. and 14 lbs. per yard, 2-ft. gauge with sleepers, but many are imported without sleepers.

(*d*) Packing.—Not important.

The freight is 15*s.* per ton from London, but with much variation. From Hamburg the freight is generally about 20*s.* per ton.

40. METALS.—(*a*) Iron. (*d*) Railroad of all Sorts, viz., Other than Rails.

——	1884.	1889.	1894.
	£	£	£
Total imports - - -	32,000	160,000	18,000
Foreign countries:—			
Germany - - -	913	—	3,920
United States - -	113	131	—
Total foreign - -	1,026	131	3,920

Estimate of Imports in 1894.

The above table correctly indicates the countries of produce.

The foreign material imported by the Railway Department in 1894 consisted principally of axles, tires, &c., of the value of 3,111*l.* In other years the foreign imports have been much greater.

(*a*) Price.—The contract prices have been, for axles, 160*l.* and 152*l.*, delivered in Victoria; tires, 10*l.* 16*s.*, 10*l.* 19*s.*, 11*l.* 3*s.*, 11*l.* 14*s.* 6*d.*, 13*l.* 14*s.* 6*d.*, and 14*l.* 13*s.*, delivered in Victoria.

(*b*) Quality.—The material was from a firm of world-wide repute.

(*c*) Suitability.—The goods were according to specification.

(*d*) Packing.—Not important.

(*e*) Other causes.—Nil.

40. METALS.—(*a*) Iron. (*e*) Wire.

——	1884.	1889.	1894.
	£	£	£
Total imports - - -	59,890	103,201	67,017
Foreign countries:—			
Belgium - - -	690	5,673	11,557
Germany - - -	3,872	43,759	32,445
United States - - -	94	2,246	713
Total foreign - -	4,656	51,678	44,715

Estimate of Imports in 1894.

The above table correctly indicates the countries of origin.

The principal iron wire in the market is Westphalian annealed drawn black fencing wire. This has gradually displaced British fencing wire, and the proportion since 1894 has greatly increased.

(*a*) Price.—The price of the German wire is from 5*l.* 16*s.* 6*d.* to 6*l.* 7*s.* 6*d.* per ton free on board at Antwerp. The price in Melbourne is about 7*l.* per ton to 7*l.* 15*s.* 6*d.* per ton for Nos. 8 and 10. English wire of similar quality is generally about 5*s.* per ton

dearer than German. Barbed wire is quoted at 12*l.* for 12 gauge, and 13*l.* 15*s.* for 14 gauge, the German being at present slightly cheaper than British. Some samples of the German fencing wire most commonly used are forwarded.

(*b*) Quality.—British and German wire are generally considered to be about equal in quality.

(*c*) Suitability.—German wire is sometimes preferred to British because of its greater flexibility. It is also in greater lengths, and, consequently, more suitable for fences. The only British wire in competition is a roiled wire, which maintains a portion of the trade by reason of its cheapness, and by the fact that persons sometimes buy in ignorance of this difference. No. 8 gauge is the most largely used. The British No. 8 gauge is rather less in cross section than German No. 8, and consequently of greater length in proportion to the weight.

(*d*) Packing.—The German wire was at one time much better coiled than the British, and it was partly owing to this cause that the Germans gained the trade. Even now the German packages are preferred. The coils are handier, one fitting inside another, and being coiled flat they will stand in columns and occupy much less space for storage. This is a great advantage, not only as regards storage, but also for cartage and removal.

(*e*) Other causes.—Freight. Wire has been brought here by German sailing ships as low as 9*s.* per ton, when the freight from Liverpool was 16*s.* per ton. The demand by German vessels for dead weight no doubt often causes them to take wire at special terms which are not known here, as foreign wire is quoted at the price at which it is deliverable on the Melbourne wharf. The freight from England is generally about 15*s.* per ton by sailing ship, and 20*s.* to 26*s.* per ton by a cargo steamer. A German cargo line quotes a special rate of freight of 17*s.* per ton to the Melbourne wharf from either London, Hamburg, Bremen, or Antwerp.

Terms.—The Germans give better terms. To good firms the terms are 63 days after receipt of documents; they do not draw bills, and thus the trouble of accepting and some expenses are saved. British firms' documents are hypothecated through the banks.

40. METALS.—(*a*) Iron. (*f*) Hoops, Sheets, and Boiler Plates, viz., Hoops.

No statistics of this item are given, because the importations of foreign manufacture have hitherto been less than 5 per cent. of the total. The hoops of German manufacture are, however, now being imported in considerable quantities, the price being less than that of British, and the quality equal.

40. METALS.—(*a*) Iron. (*f*) Hoops, Sheets, and Boiler Plates, viz., Sheets other than Galvanised and Boiler Plates.

	1884.	1889.	1894.
	£	£	£
Total imports - - -	13,130	23,502	14,410
Foreign countries :—			
Belgium - - - -	—	—	757
Germany - - - -	61	30	420
Total foreign - -	61	30	1,177

Estimate of Imports in 1894.

The above table correctly represents the countries of origin.

(*a*) Price.—The price for trade parcels in Melbourne is for known British brands of plate iron 9*l.* to 9*l.* 7*s.* 6*d.* per ton, and about 11*l.* 10*s.* per ton for ordinary black sheet up to 20 gauge. There is German or Belgian iron in the market, the price of which is not quoted, but which is probably cheaper than British plate.

(*b*) Quality.—German or Belgian plate is of less even and less known quality than British.

(*c*) Suitability.—British iron suits this market, but there is a small demand for a cheaper article.

(*d*) Packing.—Not important.

(*e*) Other causes.—Freight. The freight on iron is quoted at 12*s.* 6*d.* per ton by either steamers or sailing vessels, with 5 to 10 per cent. primage, payable in London. The freight from Germany or Belgium would probably be about the same, but these rates vary in accordance with the demand for dead weight.

40. METALS.—(*a*) Iron. (*f*) Hoops, Sheets, and Boiler Plates, viz., Boiler Plates.

	1884.	1889.	1894.
	£	£	£
Total imports	27,720	81,191	5,785
Foreign countries :—			
Belgium	—	—	—
France	576	—	—
Germany	214	5,601	1,375
Total foreign	790	5,601	1,375

Estimate of Imports in 1894.

The above table correctly indicates the countries of origin.

(*a*) Price.—Steel plates of boiler quality are quoted in Victoria at 11*l.* per ton, but the average price is below that sum. The trade is governed by the price, and the fact that competition is maintained shows that the prices of British and German plates are about equal. The Germans are, however, lately getting a firmer footing in the market.

(*b*) Quality.—The range of qualities of British and German is nearly the same, but some British plates lately imported have been defective. In bending for ploughshares, &c., they split, and in some cases chips fly out. The German plates are free from these defects.

(*c*) Suitability.—No difference.

(*d*) Packing.

(*e*) Other causes.—The remarks in regard to freight under the next preceding heading apply to boiler plates.

40. METALS.—(*a*) Iron. (*i*) Steel Unwrought.

	1884.	1889.	1894.
	£	£	£
Total imports	20,780	53,179	24,624
Foreign countries :—			
Belgium	—	150	1,187
France	386	—	—
Germany	11	158	1,113
United States	—	—	122
Total foreign	397	308	2,422

Estimate of Imports in 1894.

The above table accurately indicates the countries of origin.

Nearly the whole of the steel for tools and for mining purposes is British. The foreign portion of the importations consists of steel sheets, plates and bars. Steel boiler plates are included under the preceding heading. It has been found impossible to correctly separate iron and steel in these tables.

(*a*) Price.—The German goods are at very low prices.

(*b*) Quality.—The British goods are of better quality and much more reliable.

(*c*) Suitability.—The German goods are suitable to supply the demand for the cheapest article.

(*d*) Packing.

(*e*) Other causes.—The remarks in regard to freight under heading 40 *a* (*b*) apply also to steel.

40. METALS.—(*f*) Zinc, Unwrought and Wrought.

——	1884.	1889.	1894.
	£	£	£
Total imports - - -	2,432	5,624	1,205
Foreign countries :—			
Belgium - - - -	145	1,322	589
Germany - - - -	36	169	373
Total foreign - -	181	1,491	962

Estimate of Imports in 1894.

	£
Total as above - - £1,205	
Belgian produce - - - -	1,061

The above table contains sheet zinc, 848*l.*; ingots, 213*l.*; and perforated, 144*l.* Zinc is nearly all purchased in England, and its origin is not known here. It is, however, generally believed to be the produce of the Belgian mines at Moresnet, and the ingots and sheets are, it is thought, made there.

(*a*) Price.—Zinc sheet is quoted in Victoria at 22*l.*, in 5-cwt. casks.

(*b*) Quality.—Such as is universally known.

(*c*) Other causes.—Freight. If it be correct that Belgian zinc comes by way of Great Britain, Belgium must be at a disadvantage as regards freight equal to the carriage from the mines to Great Britain.

41. MUSICAL INSTRUMENTS.—(*a*) Organs and Harmoniums.

——	1884.	1889.	1894.
	£	£	£
Total imports - - -	13,200	14,628	1,790
Foreign countries :—			
Germany - - -	—	70	33
United States - -	9,690	13,246	1,340
Total foreign - -	9,690	13,316	1,373

Estimate of Imports in 1894.

The above table represents correctly the countries of produce.

The whole of the trade in cabinet organs and harmoniums is now in the hands of the United States. The Germans and the Canadians at one time had a share of the market, but their trade is dead.

As there is apparently no competition, no particulars of prices, &c., have been collected.

41. MUSICAL INSTRUMENTS.—(*b*) Pianos.

——	1884.	1889.	1894.
	£	£	£
Total imports - - -	81,210	114,902	13,601
Foreign countries :—			
Belgium - -	160	1,926	34
China - - -	—	25	—
France - - -	—	504	20
Germany - - -	19,870	72,904	8,826
Italy - - - -	—	143	—
Sweden - - -	—	7	—
United States - - -	828	80	50
Total foreign - -	20,858	75,589	8,930

Estimate of Imports in 1894.

	£13,601	£
Total as above		
German produce		10,000
French produce		1,000
United States produce		500
		11,500

(*a*) Price.—English pianos range from about 18*l.* each upwards; German from about 14*l.* upwards, these being the factory invoice prices. The casing for cheap German pianos costs 1*l.* 10*s.* The freight by a German cargo steamer, at present 30*s.* per ton to 2*l.* 14*s.*, and other items make the expenses to the Melbourne wharf about 5*l.* 10*s.* The freight quoted is somewhat higher than the average. On more valuable pianos the casing is 2*l.* and 3*l.*, and the freight and other charges somewhat higher. The largest demand here is for pianos of which the invoice price averages about 17*l.*, and the cost landed in Melbourne about 22*l.* 10*s.*

(*b*) Quality.—Some German pianos are by world-renowned makers, and the quality is of the highest. The bulk of the trade is, however, in pianos which are inferior to the British. Upright cottage pianos are most in demand.

(*c*) Suitability.—British pianos do not suit the requirements of the mass of buyers. Their prices place them out of the reach of the majority of the people. In this Colony all classes of the community require pianos, and they cannot afford to buy the high-class instruments sent from England. The Germans have suited their manufactures to the trade. Their pianos are of good appearance, large for the price, sometimes overloaded with ornamentation, and of powerful tone, whilst the British pianos are of the style and tone which has been essentially British for the past 40 years, and which does not find favour here. The British have not realised the difference of taste between the United Kingdom and the Colonies, whilst the Germans have made a study of this matter.

(*d*) Packing is dealt with under (*a*) Price.

(*e*) Other causes.—Freight has been considered under (*a*) Price, but it may be added that, in some seasons, pianos have been carried for as little as 17*s.* 6*d.* per ton on German cargo steamers. In this matter British manufactures are at no disadvantage; they could sometimes send as cheaply.

This is one of the articles upon which, as is stated in the introductory remarks, the Germans depend to keep their steamer lines running. It would be of wide-spreading advantage to British commerce if these heavy and bulky goods could be sent from Great Britain.

41. MUSICAL INSTRUMENTS.—(*c*) Other.

	1884.	1889.	1894.
	£	£	£
Total imports	15,603	20,721	7,865
Foreign countries:—			
Belgium	19	356	213
China	40	6	—
France	2,107	1,413	211
Germany	1,512	4,512	3,828
Italy	—	—	34
United States	7	33	7
Total foreign	3,685	6,320	4,293

Estimate of Imports in 1894.

	£7,865	£
Total as above		
French produce		2,000
German produce		4,000
Other foreign produce		500
		6,500

Speaking generally, brass instruments are English and French, and all other instruments German. The heading includes concertinas, accordions, mouth organs, and stringed instruments, all from Germany, and band and orchestra wind instruments from France.

(*a*) Price.—The British brass instruments are of higher quality and price than French or German. It is known that some British makers, when they cannot compete in price with the French and Germans, import instruments partly finished, and finish and brand them with a British name, thus securing a middleman's profit. German stringed and other instruments are much cheaper than British goods of equal quality.

(*b*) Quality.—In brass instruments the British are the best, the French second, and the German of lowest quality, but this general statement is subject to many exceptions. In stringed instruments the Germans supply all qualities.

(*c*) Suitability.—There is not much difference in regard to the suitability of the instruments supplied by different nations; the trade depends upon the price, combined with the quality.

(*d*) Packing.—No important difference.

(*e*) Other causes.—Not important.

42. OIL AND FLOORCLOTH.

	1884.	1889.	1894.
	£	£	£
Total imports	41,091	89,100	31,094
Foreign countries:—			
Belgium	—	—	1,229
France	—	155	115
Germany	—	—	988
United States	197	105	22
Total foreign	197	260	2,354

Estimate of Imports in 1894.

		£
Total as above	£31,094	
Belgian produce		2,000
German produce		1,500
Other foreign produce		200
		3,700

(*a*) Price.—In nearly all the superior and medium qualities of floorcloth the prices for British goods are lower than for foreign. In very low qualities the Belgian and German goods are cheaper than British. Two samples of Belgian linoleums are forwarded, of which the prices are respectively 1*s.* 1½*d.*, and 2*s.* 2½*d.* per square yard.

(*b*) Quality.—German and Belgian goods are inferior to British.

(*c*) Suitability.—Some foreign goods are suitable to supply a certain demand in the market for very cheap articles, but the British goods fill all legitimate requirements.

(*d*) Packing.—No important difference.

(*e*) Other causes.—Not important.

44. PAINTERS' COLOURS AND MATERIALS.—(*a*) Dry colours.

	1884.	1889.	1894.
	£	£	£
Total imports	22,207	8,488	11,348
Foreign countries:—			
Belgium	82	—	25
China	101	—	46
France	166	—	—
Germany	1,500	10	1,465
Italy	—	—	32
United States	241	181	555
Total foreign	2,090	191	2,123

Estimate of Imports in 1894.

		£
Total as above	£11,348	
German produce		3,000
United States produce		555
Other foreign produce		300
		3,855

The British send to this market the greater part of the dry colours used, but the German trade is said to be increasing. The Germans send to this market vermilionette, chrome greens, and ultramarine. The British send oxides, venetian red, vermilion, and chrome yellows.

The dry and pulp colours used for paper staining are all German.

44. PAINTERS' COLOURS AND MATERIALS.—(*b*) Turpentine.

——	1884.	1889.	1894.
	£	£	£
Total imports	11,135	12,916	7,538
Foreign countries:—			
Belgium	—	—	28
United States	10,955	10,892	6,544
Total foreign	10,955	10,892	6,572

Estimate of Imports in 1894.

		£
Total as above	£7,538	
United States produce		7,538

(*a*) Price.—2*s.* 1*d.* to 2*s.* 4*d.* per gallon.
(*b*) Quality.—American turpentine is of good quality.
(*c*) Suitability.—Suitable to requirements.
(*d*) Packing.—Satisfactory.
(*e*) Other causes. Not important. The trade has always been American.

44. PAINTERS' COLOURS AND MATERIALS.—(*c*) Varnish.

——	1884.	1889.	1894.
	£	£	£
Total imports	19,580	23,325	80,100
Foreign countries:—			
France	—	3	—
Germany	23	44	3
United States	166	316	912
Total foreign	189	363	915

Estimate of Imports in 1894.

The above table correctly represents the countries of produce.

The foreign varnish imported consists of a small quantity of American varnish of rather low quality, and some special kinds for carriage and similar work.

(*a*) Price.—The price of British varnish is, in nearly all cases, lower than foreign. It is not possible to trace and give particulars of the miscellaneous American varnishes occasionally imported.

44. PAINTERS' COLOURS AND MATERIALS.—(*d*) Brushes.

Estimate of Imports in 1894.

		£
Total	£1,000	
German produce		250

Nearly all painters' brushes are made in the Colony.

(*a*) Price.—British brushes are of superior quality and higher price than German. Some samples of German and British brushes, for comparison, are forwarded. The price of German brushes is about two-thirds of that of the corresponding British brushes.

(*b*) Quality.—German brushes are inferior. They are not of sufficiently good quality for use by tradesmen, and they are sold mostly to householders for home use. In appearance they are very similar to British brushes.

(*c*) Suitability.—The German brushes supply a limited demand for cheap articles, but the British brushes are most suitable for tradesmen.

(*d*) Packing.—No difference.

(*e*) Other causes.—Not important.

44. PAINTERS' COLOURS AND MATERIALS.—(*e*) Gold Leaf.

——	1884.	1889.	1894.
	£	£	£
Total imports	3,111	7,691	2,212
Foreign countries:—			
Belgium	—	586	216
Germany	122	317	690
Total foreign	122	903	906

Estimate of Imports in 1894.

		£
Total as above	£2,212	
Belgian produce		500
German produce		1,500
		2,000

(*a*) Price.—The price of British gold leaf is 70*s.* per 1,000 leaves. German gold leaf is sold on an average at about 54*s.* per 1,000 leaves.

(*b*) Quality.—British gold leaf is of better quality than German; it is thicker, but it is doubtful whether it is of purer metal. Some German leaf tested in Melbourne contained 97 per cent. of gold. A sample is forwarded.

(*c*) Suitability.—The German and Belgian leaf suits this market best. It is of a large range of qualities whilst British is of one quality, suitable only for certain purposes, such as frame-making. There is a large demand for the thinner-beaten and cheaper German leaf.

(*d*) Packing.—Not important.

(*e*) Other causes.—Gold leaf like the British is made in the Colony, whilst the thinner-beaten leaf has not been made here, and there is, consequently, no local competition with the foreign trade.

45. PAPER (OTHER THAN HANGINGS).—(*a*) Printing.

——	1884.	1889.	1894.
	£	£	£
Total imports	176,407	240,668	127,944
Foreign countries:—			
Belgium	72	732	945
China	—	60	2
France	83	—	—
Germany	2,228	5,410	5,124
Norway	—	—	173
United States	—	2,904	13,637
Total foreign	2,383	9,106	19,881

Estimate of Imports in 1894.

	£
Total as above - - £127,944	
United States produce - - - - - -	13,637
German produce - - - -	10,000
Norwegian produce - - - -	2,000
Other foreign produce - - - -	1,000
	26,637

Since the end of 1894 the foreign trade has increased, a large quantity of printing paper being now imported from the United States.

(*a*) Price.—For newspaper it is difficult to give a wholesale price, as the principal journals import for their own use. The invoiced prices of American newspaper are 2·15 cents and 1⅛*d.* per lb., and the expense of bringing it to Melbourne is about ⅜*d.* per lb. British newspaper is invoiced at 1½*d.* and 1⅝*d.*, and the cost to bring to Melbourne is slightly less than from America. Other printing papers are generally cheaper from Great Britain than from the United States, and with some exceptions, than from the Continent.

(*b*) Quality.—United States newspaper is rather inferior to British. It is a wood-fibre paper, rather fluffy, not as white nor as tough as British. In other printing papers the British manufacture is decidedly superior, especially as regards those made from esparto grass. The Americans are not so careful in details as the British. American reams sometimes vary 2 lbs. or 3 lbs. in weight, whilst British reams rarely vary more than one-eighth of a pound, and the mill joins are not nearly so neatly made in America as in Great Britain.

(*c*) Suitability.—The British manufactures are of too high a standard to meet all the requirements of this market. There is a limited demand for the cheaper description of goods, which is supplied by the United States and Germany.

(*d*) Packing.—Quantities of paper which in Great Britain are packed for export in bales are in the United States packed in substantial cases lined with waterproof paper. The American system is preferred.

(*e*) Other causes.—Freight. The freight from America is 12 cents per cubic foot = 20*s.* per ton measurement. In quoting prices the United States manufacturers often guarantee that the freight shall not exceed this amount. The freights from Great Britain vary from 12*s.* 6*d.* to 30*s.* per ton. The latest quotation seen was 16*s.* 3*d.* per ton with 10 per cent. added = 17*s.* 10½*d.*

But for the difficulty of obtaining vessels this Colony would doubtless be supplied with printing paper from Norway. A few vessels trade from Norway to Victoria with timber at one season of the year, but they do not care to carry much paper, and the service is irregular. With greater facilities of carriage the Victorian trade will probably be supplied from the mills at Hönefôs and elsewhere (now being established by British firms to save the carriage of the pulp to Great Britain) in Norway.

The British trade is also threatened by the cheap freights from the west coast of America. A line running from San Francisco to New Zealand carries paper at very cheap rates, for the reason that the steamers require dead-weight cargo. A little paper made in Oregon has been brought to Victoria by this route, and it is possible the trade may increase.

Coloured Printing or Poster Paper.—For some time the Germans have possessed this trade, but lately the American manufacture is displacing the German.

(*a*) Price.—Some samples, with prices attached, are forwarded.

(*b*) Quality.—The British is of slightly better quality than is necessary.

(*c*) Suitability.—The foreign papers are of the quality required.

(*d*) Packing.—The American packing in cases lined with waterproof paper is preferred to the British packing in bales.

45. PAPER (OTHER THAN HANGINGS).—(*b*) Wrapping.

	1884.	1889.	1894.
	£	£	£
Total imports - -	12,687	18,340	2,458
Foreign countries :—			
Belgium - - -	—	75	222
China - - - -	133	77	2
France - -	6	—	—
Germany - -	236	1,310	586
Norway -	—	607	—
United States - -	—	274	—
Total foreign - -	375	2,343	810

Estimate of Imports in 1894.

		£
Total as above - -	£2,458	
Belgian produce - - - -		500
Norwegian produce - - -		500
German produce - - - -		500
Other foreign produce - - -		200
		1,700

Nearly all brown and grey wrapping paper for local use is made in the Colony. Such as is imported comes from London, but much of it is believed to be of Norwegian manufacture. The greater part of the importations consists of glazed wrapping, and cap paper, and special lines which cannot be traced. Cap paper was at one time all of British manufacture, but now the greater part is Continental.

46. PAPER (OTHER THAN HANGINGS).—(*c*) Other.

	1884.	1889.	1894.
	£	£	£
Total imports - - -	12,986	28,900	32,663
Foreign countries :—			
Belgium - - -	325	1,202	1,654
China - - - -	200	210	160
France - - -	91	33	79
Germany - -	322	3,238	5,562
Italy - - -	—	—	16
Japan - - -	—	—	189
Norway - -	—	—	9
United States - - -	384	868	515
Total foreign - -	1,322	5,551	8,184

Estimate of Imports in 1894.

The above table correctly represents the countries of produce.

The above miscellaneous papers cannot well be traced. Drawing paper and blotting paper are British. Coloured glazed (known as pamphlet paper) and coloured post are both German. They are of a cheaper class than those produced in Great Britain, and are substituted therefor. The quality of the German manufacture is good enough for the requirements of this market. Some samples, with prices attached, are forwarded.

Cardboard, which is included in the above return, is nearly all of German manufacture, and strawboard, though bought in Great Britain, is nearly all made in Holland.

47. Pictures.

——	1884.	1889.	1894.
	£	£	£
Total imports	41,934	75,173	6,101
Foreign countries:—			
Belgium	—	175	1
China	3	28	—
France	147	935	59
Germany	478	5,922	444
Italy	—	—	22
Japan	—	—	8
Norway	—	—	31
United States	3	844	60
Total foreign	631	7,904	625

Estimate of Imports in 1894.

		£
Total as above	£6,101	
German produce		5,000
Other foreign produce		500
		5,500

In 1894 there were few true works of art imported. In more prosperous times there has been a trade in the pictures of artists, and for the most part the tastes or affection of purchasers have been for British art. The public galleries and the private collections of Victoria contain a much greater proportion of the works of British than of foreign artists.

The above figures for 1894 represent the importations of trade pictures, such as oleographs, prints, engravings, and photographs. These are for the most part German, but a considerable portion is of United States manufacture.

(*a*) Price.—It is impossible to give the exact prices of pictures, but, as a rule, the cheaper kinds are sold here. There are practically no private galleries for the sale in the Colony of imported works of art.

(*b*) Quality.—From a trade point of view the pictures sold are of fair quality, but they are not as a rule artistic. Many of the German and United States pictures are reproductions in various mediums of the works of British and foreign artists.

(*c*) Suitability.—The imported foreign pictures suit the tastes of a large section of the community.

(*d*) and (*e*) Packing and other causes.—There is nothing special to note under these headings.

48. Plate and Plated-ware.

——	1884.	1889.	1894.
	£	£	£
Total imports	25,180	74,944	20,115
Foreign countries:—			
Belgium	—	61	—
China	—	5	—
France	54	912	34
Germany	72	1,525	475
Sweden	—	3	—
United States	4,669	6,158	1,799
Total foreign	4,795	8,664	2,308

Estimate of Imports in 1894.

	£
Total as above - - £20,115	
United States produce - - - - -	3,000
German produce - - - - -	1,500
Other foreign produce - - - - -	500
	5,000

No foreign gold or silver plate is imported. The British trade in electro-plated ware in proportion to the whole trade is increasing. The German trade has almost ceased, and the United States sends to Victoria only a few special lines, for which the demand is said to be dying out. The Germans send prize or trophy cups and a few articles in which their manufacturers excel.

(*a*) Price.—Taking quality into consideration, British plated-ware is cheaper than foreign, except in regard to the special United States goods mentioned above. The American articles consist of cruet-stands, which are sold at from 7*s*. 6*d*. each up to about 14*s*. each; butter dishes, at 8*s*. to 10*s*. each; serviette rings, at 12*s*. 6*d*. per dozen; and a few minor items. These are such as are made in large quantities for the American market, and it is said Victoria is supplied with the surplus output at a lower price than that at which the goods could be bought in the United States.

(*b*) Quality.—British plated-ware is decidedly superior in quality and finish to all foreign plated-ware. The goods of the well-known British manufacturers are reliable, and this is of importance in regard to articles the intrinsic worth of which can only be tested by use. The American goods are also of standard quality, not equal to the best British, but fairly good. The superiority of United States pressed glass has been a factor in enabling the manufacturers to produce cheaply those articles which contain glass bottles or bowls. German goods have been almost displaced in this market by reason of the inferiority in the base metal and the thinness of the silver.

(*c*) Suitability.—American goods of the few kinds that are imported are suitable to a certain demand. They can be seen on almost every café table, and by reason of their low price they are in use in many houses. The patterns and styles are also liked by many, but the United States do not send to this market anything like the wide range of good patterns received from Great Britain.

(*d*) Packing.—The packing of British plated-ware leaves nothing to be desired, but the American style of manufacture allows of more economic packing. Their special lines are made with interchangeable parts, so that the rims, the handles, the stands, and the bottles can be packed, each kind in a separate package. The freight and carriage are thus reduced, and there is no difficulty in putting the parts together.

(*e*) Other causes.—In freight the United States goods have no advantage except from being packed in less space. The rate is 20*s*. to 27*s*. per ton by sailing ship with irregular service. From Great Britain the freight by sailing ship would generally be less, but the British commonly avail themselves of the regular lines of steamers, and pay a higher freight, say, 40*s*. per ton, by cargo steamers.

As in other goods, the competition between British and foreign goods takes place in London rather than in the Colony. A large German manufacturing firm advertises by catalogue that it has opened show-rooms and a branch office in London, "for Great Britain, Ireland, and the Colonies." This firm sends little to Victoria but pint and half-pint mugs for hotels. Their goods are made to English patterns.

49. PROVISIONS, NOT OTHERWISE DESCRIBED.—(*a*) Meats, Potted and Preserved.

	1884.	1889.	1894.
	£	£	£
Total imports - - -	3,419	18,392	7,236
Foreign countries :—			
Belgium - - - -	—	64	—
China - - - -	—	5	—
France - - - -	118	87	24
Germany - - -	—	135	46
United States - - -	—	593	477
Total foreign - -	118	884	547

Estimate of Imports in 1894.

The above table correctly represents the countries of origin.

There is no regular trade worth mention in foreign preserved meats. A considerable portion of the importation shown above consists of surplus stores and irregular shipments.

49. PROVISIONS, NOT OTHERWISE DESCRIBED.—(*b*) Milk, Preserved.

——	1884.	1889.	1894.
	£	£	£
Total imports - - -	18,483	50,096	11,884
Foreign countries:—			
Belgium - - - -	—	—	—
France - - - -	—	450	5
Germany - - - -	112	—	23
Italy - - - -	—	—	971
Total foreign - -	112	450	999

Estimate of Imports in 1894.

		£
Total as above - -	£11,384	
Swiss produce - - - - - -		7,500
Norwegian produce - - - -		2,500
Other foreign produce - - - - -		1,000
		11,000

(*a*) Price.—Four samples of the principal kinds of milk sold in Victoria are forwarded. The prices are as follow:—

	s.	*d.*	
1. Swiss milk, made in Switzerland - -	5	5½	per dozen tins.
2. Of same brand, made in England - -	4	9½	,,
3. Swiss milk, made in Switzerland - -	5	5½	,,
4. Scandinavian condensed milk - - -	5	5½	,,

(*b*) Quality.—These milks are all of fair quality. The British milk has not quite the flavour of the Swiss milk, but it is said to be improving and increasing in favour.

(*c*) Suitability.—British and foreign are so similar that there can be little difference.

(*d*) Packing.—No difference.

(*e*) Other causes.—The British milk has an advantage in regard to freight, as may be judged from the fact that nearly all the foreign milk comes here by way of London.

The marking is important in regard to milk. The British milk sold in this market bears on the tins an indication that it is made in Switzerland, but has also stamped across the label the words "Made in England." The paper wrappers contain an indication that the goods are made in Switzerland without any contradicting statement. The manufacturers in Great Britain are the Swiss companies, and they are making use of the reputation they acquired in Switzerland. Now that this is known the Victorian Government will take steps to prevent any infringement of the Trade Marks Act.

49. PROVISIONS, NOT OTHERWISE DESCRIBED.—(*c*) Rice.

——	1884.	1889.	1894.
	£	£	£
Total imports - - -	69,576	77,552	46,036
Foreign countries:—			
China - - - -	45,487	31,036	10,376
Japan - - - -	2,489	22,168	19,590
Total foreign - -	48,976	53,204	29,966

Estimate of Imports in 1894.

The competition in this Colony is between the products of China and Japan and those of British Burmah and India. The Chinese product is principally such as is required for use by Chinese residents, whilst the Japanese and British rice is for the use of Europeans. Very little Chinese rice is imported, the greater part of that shown in the return as coming from China being Japanese rice transhipped.

(*a*) Price.—Japanese rice is generally dressed in Victoria. The cost of brown is 9*l.* to 9*l.* 5*s.*, landed in Melbourne in bond. Dressed Japanese costs about 10*l.* 15*s.* Patna rice is quoted at 12*l.* 5*s.* to 12*l.* 10*s.* wholesale in bond, and Rangoon rice at 10*l.* 4*s.* per ton.

(*b*) Quality.—The rice imported is of the standard quality.

(*c*) Suitability.

(*d*) Packing.—Not important.

(*e*) Other causes.—The freight from Japan is 30*s.* per ton, and other charges about 15*s.* per ton. From Rangoon and India freight is higher.

49. PROVISIONS, NOT OTHERWISE DESCRIBED.—(*d*) Preserved Vegetables.

——	1884.	1889.	1894.
	£	£	£
Total imports	1,483	1,552	610
Foreign countries :—			
China	505	244	180
France	—	508	191
Germany	40	118	9
Italy	—	13	63
United States	—	79	—
Total foreign	545	962	443

Estimate of Imports in 1894.

The above table correctly indicates the countries of produce.

The few importations consist of peas, beans, asparagus, &c., all French or German, and ginger.

Ginger is imported from Great Britain, but is Indian produce. Some is now being imported from Japan.

(*a*) Price.—Indian ginger is from 4*d.* to 6*d.* per lb. for various grades. Japanese is 3*d.* to 3½*d.* per lb. for the only description imported.

(*b*) Quality.—The Japanese ginger is inferior in quality to any of the grades of Indian ginger.

(*c*) Suitability.—Japanese ginger is not of sufficiently good quality for the supply of the whole trade, but is suitable for a part of the demand.

(*d*) Packing.—Not important.

(*e*) Other causes.—The freight from Japan is about 30*s.* per ton. Indian ginger taken to England and then brought to Victoria is at a disadvantage of about ¼*d.* per lb.

51. SALT.

——	1884.	1889.	1894.
	£	£	£
Total imports	23,087	48,547	20,165
Foreign countries :—			
Germany	—	1,446	2,052
Total foreign	—	1,446	2,052

The above table correctly indicates the countries of produce.

Since 1894 the importation of German white rock salt has ceased owing to the fact that white rock salt, unground, has been subjected to a duty, whilst brown rock salt remains free. The importation of German ground white rock salt still continues, and is increasing, and British salt is being displaced. German brown or red rock salt is still imported in limited quantities.

(*a*) Price.—The following are quotations of the prices in bond in Victoria. Salt is sold at these prices by the importer to dealers or manufacturers, in comparatively small quantities :—

	£	*s.*	*d.*	
Liverpool salt—coarse	1	17	6	per ton.
„ fine	2	10	0	„
Worcestershire salt—coarse	2	15	0	„
„ fine	3	7	6	„
German salt—fine	2	5	0	„
„ of a known brand—fine	2	10	0	„
„ sifted dairy	3	7	6	„
Rock salt—brown	2	5	0	„

German white rock salt is quoted at 11*s.* 6*d.* per ton, and red rock salt at 10*s.* 6*d.* per ton, free on board at Hamburg, but the freight would have to be paid, at the ordinary rates, by a purchaser. The business in Hamburg is a monopoly, and the exporter quotes a price which includes freight. It is impossible to buy profitably except from the single exporter, whose prices and rates of freight are not divulged.

(*b*) Quality.—German rock salt is superior to British in appearance, much of it being white and transparent, whilst British salt is generally brownish or reddish in tint. It is said that in other respects the British is superior, containing less water and being less friable. The fine salts imported from Germany are rock salts ground to various degrees of fineness. It will be seen by the prices quoted that they are not considered equal to the best British fine salts of known brands, but they are equal to the lower qualities.

(*c*) Suitability.—There is not much difference in this respect, both British and German salts being prepared to suit the various requirements of the market.

(*d*) Packing.—No important difference.

(*e*) Other causes.—Freight. The freight from Hamburg is not divulged. As stated before, the shipping business is nearly all in the hands of one man, who buys the product of the Stassfurt mines, and ships to the Colony, quoting a price which includes freight and charges. This shipper's position must enable him to obtain freight at very low rates, by taking advantage of the demand for dead-weight, which is at times very keen. It is generally believed that the freight paid on salt from Hamburg is less than from Great Britain, and it is even thought that, judging from the price at which salt has been sold here, there must necessarily be some State bonus given on export, but there is no evidence of the payment of any such bonus. It is certain that if the shipper does not enjoy some special advantages, he must obtain salt from the mines at a very low price. Freight from Great Britain has been as low as 9*s.* per ton, and as high as 14*s.* per ton. The principal importers charter vessels, and the particulars of the cost to them are not known. Salt is one of the dead-weight lines upon which the running of the German lines depends, and it has already been pointed out that if the British could win the trade in a few of such weighty goods, the foreign trade generally would be much crippled.

Shipments of salt to Victoria are sometimes made at Bremen by the German subsidised mail line at very low rates of freight. British shippers can ship many goods by this line, and be on an equal footing with the Germans, but this advantage does not extend to salt.

The German trade has been fostered in Victoria by firms interested in the loading of vessels, who send out consignments to Victorian agents when space is available in the ships. A very small profit is required on such goods, and they can be sold cheap. The British salt trade is not done by consignment, but by purchase in Great Britain.

52. SEEDS OF ALL SORTS.—(*a*) Canary.

——	1884.	1889.	1894.
	£	£	£
Total imports - - -	1,555	1,905	4,500
Foreign countries :—			
Belgium - - -	—	—	136
Egypt - - -	—	—	137
France - - -	—	30	—
Germany - - -	—	73	125
Total foreign -	—	103	398

Estimate of Imports in 1894.

		£
Total as above - -	£4,500	
Foreign produce - - - - -		2,000
		2,000

The above estimate must be taken with great reservation. Victorian importers buy in London, but they do not know in most instances whether the seed bought is British or foreign.

(*a*) Price.—The price of the best quality, whether British or foreign, is at present 14*l.* 10*s.* per ton in bond.

(*b*) Quality.—The range of qualities is about equal.

(*d*) Packing.—Canary seed from Great Britain is usually packed in tanks, which are often saleable at a profit after being emptied. Perhaps the same advantage is enjoyed by foreigners who pack in London.

(*e*) Other causes.—The Victorian importer knows of no difference of freight, as all his seed is bought in London, but foreign seed must be burdened with the charges from the place of growth to London.

52. SEEDS OF ALL SORTS.—(*b*) Clover.

——	1884.	1889.	1894.
	£	£	£
Total imports - - -	529	2,530	2,708
Foreign countries :—			
Germany - - -	—	478	—
United States - -	124	—	1,688
Total foreign -	124	478	1,688

Estimate of Imports in 1894.

		£
Total as above - -	£2,708	
Continental produce - - - - -		1,020
United States produce - - - - -		1,688
		2,708

Although bought in London it is not thought that any of the clover seed imported is British.

(*a*) Price.—The samples herewith are American, the prices are as below, but they vary much with the season :—

Cow grass clover - - -	60*s.* to 70*s.* per cwt.
White clover - - - -	70*s.* to 80*s.* ,,
Alsike clover - - - - -	50*s.* to 60*s.* ,,
Red clover - - - - -	48*s.* to 54*s.* ,,
Crimson clover - - - -	36*s.* per cwt.

(*b*) Quality.—The same range of qualities is produced on the Continent and in the United States.

(*c*) Other causes.—The freight from the United States is about 20*s*. per ton measurement. British seed could be brought at about the same rate in sailing ships. Continental seed landed and sold in London probably costs more for carriage and charges.

52. SEEDS OF ALL SORTS.—(*c*) Grass.

——	1884.	1889.	1894.
	£	£	£
Total imports	8,375	16,271	12,968
Foreign countries :—			
Germany	—	—	2,211
Japan	—	—	133
Madagascar	—	—	74
United States	—	20	—
Total foreign	—	20	2,418

Estimate of Imports in 1894.

	£12,968	£
Total as above		
Continental produce		4,000
United States produce		2,000
Other foreign produce		200
		6,200

This estimate must be received with caution, as Continental grass seeds are bought in London, and the country of origin is not known here. Timothy grass is principally American produce, but at times seed of Hungarian produce is sold here. Most of the natural grasses for permanent pastures are British. Great Britain supplies the crested dog's tail, the meadow fescue, the meadow foxtail, the wood meadow, and the rough-stalked meadow. The creeping bent grass is partly Continental and partly American. The Kentucky blue grass comes principally from the United States and Germany. Cocksfoot and rye are supplied by local production or imported from a neighbouring Colony.

(*a*) Price.—The foreign and British goods being for the most part identical in quality the sole factor in determining the trade is the prices. They are as follow for those grasses in which there is foreign competition :—

Timothy grass	30*s*. to 36*s*. per cwt.
Kentucky blue grass	9*d*. to 10*d*. per lb.
Creeping bent grass	4½*d*. to 6*d*. „

These are the invoice prices at the place of produce. Kentucky blue grass is sold wholesale in Melbourne at 1*s*. 1*d*. per lb., and creeping bent at about 9*d*. per lb.

52. SEEDS OF ALL SORTS.—(*d*) Other.

——	1884.	1889.	1894.
	£	£	£
Total imports	11,964	14,961	11,066
Foreign countries—			
China	211	53	12
France	—	25	125
Germany	22	1,255	1,186
United States	194	167	174
Total foreign	427	1,500	1,497

Estimate of Imports in 1894.

	£11,066	£
Total as above		
German produce		3,500
United States produce		500
Other Foreign produce		1,000
		5,000

Mustard for grinding is not included in the above. The British products imported are rape, linseed, coriander, turnip, and most vegetable seeds; the first three descriptions are principally from India. The Foreign products are lucerne, the greater portion of which is from America, the remainder being German, and nearly all garden flower seeds, which are German.

(*a*) Price.—The price of lucerne is 46*s.* to 56*s.* per cwt. The prices of garden flower seeds are too numerous to quote.

(*d*) Packing.—A sample of paper bags is forwarded, which is intended to show the style in which German flower seeds are prepared for the market. Very small quantities are put in each packet to suit the requirements of the dwellers in suburban villas and cottages.

(*e*) Other causes.—A large British producer has lately established a special agency in Victoria, who is prepared to "take orders," but who holds no stock. He can scarcely hope to succeed against the foreigners whose goods are in the market.

54. SILK MANUFACTURES.—(*a*) Broad Piece Goods.

	1884.	1889.	1894.
	£	£	£
Total imports	238,404	367,852	165,363
Foreign countries:—			
Belgium	272	—	1,389
China	22	3,618	2,327
France	6,992	4,952	6,988
Germany	—	2,553	2,941
Japan	—	—	198
United States	46	14	9
Total foreign	7,332	11,137	13,852

Estimate of Imports in 1894.

	£165,363	£
Total as above		
French produce		90,000
Belgian produce		6,000
German produce		20,000
Chinese produce		3,000
Swiss and Italian produce		10,000
		129,000

In this return all goods containing silk are ranked as silk.

The only descriptions of British silk in the market in any considerable quantity are velvet and plush; in the former, British manufacture is being displaced by German. Of silk velvets, Great Britain supplies about a quarter of the consumption, Germany about a quarter, and France about half. Plush is not now in fashion. Nearly all the dress goods are of Lyons manufacture, the British dress goods received here being less than 5 per cent. of the total.

(*a*) Price.—No comparison of prices can be made, as there are not sufficient British goods in competition. Some samples, with prices attached, are forwarded. The Swiss and Italians are sending some dress goods, which in price can compete with the French.

The price of silk velvets is less in Germany than in Great Britain for medium and low class goods. The higher class goods are French.

(*b*) Quality.—The quality of French silk manufactures requires no description. The designs for all such goods vended in Victoria have originated in France, and they are admired here as elsewhere. The market is continually supplied with novelties of design and pattern, and the appearance of the goods is generally excellent. Most of the other silks sold here are either imitations of French goods or of very similar style. The black silks are largely mixed with ramee fibre, and a great quantity of the piece goods included under this heading are mixtures of silk and cotton and silk and wool.

(*c*) Suitability.—No new fashions originate in Victoria; the people follow those of Great Britain and Europe, and the designs made for the Continent are suitable here. There are Foreign materials offered to suit all tastes.

(*d*) Packing.—This article is not affected by any difference in packing.

(*e*) Other causes.—Neither freight charges nor terms are appreciable factors in determining the course of this trade, which is fixed entirely by the excellence and cheapness of foreign materials.

54. SILK MANUFACTURES.—(*b*) Of other Kinds, viz., Ribbons.

——	1884.	1889.	1894.
	£	£	£
Total imports - - -	24,561	24,135	3,578
Foreign countries:—			
Belgium - - -	—	104	—
France - - -	982	607	—
Germany - - -	—	294	113
Total foreign - -	982	1,005	113

Estimate of Imports in 1894.

		£
Total as above -	£3,578	
French produce - - - - -		2,200
German produce - - - - -		1,000
Swiss produce - - - - -		200
		3,400

(*a*) Price.—Some samples, with the prices attached, are forwarded.

(*b*) Quality.—The few British ribbons sent to Victoria are of high quality, but they are too dear for the general demand in this market. The French ribbons cover a wide range of good qualities, and German ribbons also are of varied quality, but not of the very best.

(*c*) Suitability.—Foreign goods suit this market, not only by reason of their price, but also of the patterns. The French, Germans, and Swiss send to this market sufficient variety of styles, colours, and qualities to suit the trade. The British cater for only a small class of the community, and offer a very limited range of styles and colours. The finish and appearance of even the cheap foreign products is good.

(*d*) Packing.—Foreign goods are tastefully boxed and got up.

(*e*) Other causes.—Not important.

55. SKINS AND FURS.—(*a* and *b*.)

——	1884.	1889.	1894.
	£	£	£
Total imports - - -	11,546	4,486	2,344
Foreign countries:—			
China - - -	25	—	—
Germany - - -	50	—	—
United States - - -	473	—	—
Total foreign - -	548	—	—

Estimate of Imports in 1894.

	£2,344	£
Total as above		
French produce		200
Other foreign produce		100
		300

Kangaroo, opossum, rabbit, and sheep skins are not imported. The above table contains principally dressed fur skins for making boas, muffs, &c., and for trimmings. A comparison of the prices, qualities, &c., cannot be made, and it has not been possible to tell whether the furs imported are British or foreign dressed. The skins are nearly all of foreign origin.

56. SOAP.—(*a*) Perfumed.

——	1884.	1889.	1894.
	£	£	£
Total imports	2,694	19,122	14,957
Foreign countries:—			
Belgium	30	40	16
France	—	97	81
Germany	107	119	33
United States	—	571	455
Total foreign	137	827	585

Estimate of Imports in 1894.

	£14,957	£
Total imports as above		
French produce		150
United States produce		455
German produce		100
Other foreign produce		100
		805

Since 1894 the importation of foreign soaps has declined.

(*a*) Price.—The foreign soaps in the market are so widely distributed in small quantities, of various kinds, that prices cannot be obtained. The prices depend as much upon the packing as the quality of the soap, and the French send a little superior soap tastefully boxed; the Germans also send a small quantity of a cheaper description.

(*e*) Other causes.—Different brands of British soaps are very widely advertised, large sums of money being spent in newspaper advertisements, posters, agencies, &c. The consequence of this is that the soap reaches the consumers very much enhanced in price. A business so conducted must always be in danger, as the consumers may perhaps at some time refuse to pay unnecessarily high prices to suit the manufacturer's ends.

Common soap is imported in very small quantities, and the importations are all British.

57. SPIRITS.—(*a*) Brandy.

——	1884.	1889.	1894.
	£	£	£
Total imports	169,527	187,805	40,988
Foreign countries:—			
Belgium	40	43	192
China	—	1,200	—
France	36,520	9,725	26
Germany	252	1,661	284
Total foreign	36,812	12,629	502

Estimate of Imports in 1894.

	£40,988	£
Total as above		
French produce		40,000
German produce		500
Other foreign produce		488
		40,988

The importations of brandy are now, and always have been, wholly foreign, brandy not being a natural product of Great Britain. This commodity, however, assumes an importance in the trade of the British Empire, owing to the fact that Victoria and other British colonies are producing brandy in yearly increasing quantities. There is a probability that in the future this Colony, with some of the other Australian and South African portions of the empire, will be close competitors for the world's trade in brandy. Steps may be necessary to prevent the business of blending and preparing colonial wine spirit for market being obtained by France. It is known here that Victorian wine spirit shipped to London has been sent on to France.

(*a*) Price.—More than half the brandy imported is in bulk, and the prices range from 6*s*. to 9*s*. per gallon, with a few descriptions above and below those limits. Case brandy of the brand most largely sold in Victoria is quoted at 33*s*. to 45*s*. per case, containing $1\frac{3}{8}\frac{1}{2}$ gallons from 14 to 18 per cent. under proof. Other brands sell at various rates, from 17*s*. 6*d*. upwards.

(*b*) Quality.—The bulk brandy imported is from low to medium qualities, and the case brandy is of all qualities.

(*c*) Suitability.—The well-known French brandies suit this market.

(*d*) Packing.—No comparison can be made.

(*e*) Other causes.—French brandy is sent to Melbourne in large quantities on consignment as well as to supply direct purchasers. There is no British brandy offered.

57. SPIRITS.—(*b*) Liqueurs and Bitters.

——	1884.	1889.	1894.
	£	£	£
Total imports	4,051	6,135	1,321
Foreign countries:—			
Belgium	142	41	—
France	42	1,139	384
Germany	508	2,519	239
Italy	—	103	—
United States	1,856	592	46
Total foreign	2,548	4,394	669

Estimate of Imports in 1894.

	£1,321	£
Total as above		
French produce		600
German produce		400
United States produce		100
Other foreign produce		100
		1,200

Nearly all the liqueurs are Continental, and the bitters are Continental and American. No one line is of sufficient importance to warrant particulars being given.

57. SPIRITS.—(c) Gin.

——	1884.	1889.	1894.
	£	£	£
Total imports - - -	28,783	34,504	17,828
Foreign countries:—			
Belgium - - -	926	230	1,201
France - - - -	—	37	—
Germany - - -	315	8,637	5,549
Holland - - -	—	—	—
Total foreign - -	1,241	8,904	6,750

Estimate of Imports in 1894.

	£
Total as above - - £17,828	
Holland and Belgian produce - - -	9,000
German produce - - - - -	5,000
	14,000

The Hollands geneva and schnapps imported are all of foreign origin, but some of the latter is bottled in England. The only British product received here is dry gin, the trade in which is increasing, and perhaps to some extent displacing that in geneva and schnapps.

(*a*) Price.—The price of the principal description of geneva imported is 12*s.* 2*d.* per reputed 4-gallon case, which actually contains about $3\frac{24}{32}$ gallons, of the strength of 14·6 per cent. under proof.

Schnapps are sold at 20*s.* per reputed 2-gallon case, which actually contains about $1\frac{31}{32}$ gallons of 12 to 15 per cent. under proof.

British Dry Gin is sold at 12*s.* 6*d.* per reputed 2-gallon case, which contains $1\frac{31}{32}$ gallons of the strength of 15·5 to 16·5 per cent. under proof.

(*b*) Quality.—The gin in this market is of the well-known descriptions sold everywhere.

(*d*) Packing.—No important difference.

(*e*) Other causes.—A large quantity of the spirit shipped from Belgium and Germany is sent *viâ* London, from which it may be inferred that foreign spirit has no advantage in regard to freight. Some late shipments were subject to the following charges:—

From Rheims to Melbourne—	*s.*	*d.*	
By subsidised German line, *viâ* Antwerp, taking 42 days -	4	9	per case.
By cargo steamer, *viâ* London, taking 49 days - -	5	5	„
By subsidised French line, *viâ* Marseilles, taking 31 days -	6	7	„

57. SPIRITS.—(d) Perfumed.

——	1884.	1889.	1894.
	£	£	£
Total imports - - -	5,619	9,532	7,369
Foreign countries:—			
Belgium - - -	—	—	212
France - - - -	259	1,315	1,527
Germany - - -	304	791	670
United States - - -	374	345	32
Total foreign - -	937	2,451	2,441

Estimate of Imports in 1894.

		£
Total as above	£7,369	
French produce		5,000
German produce		1,000
Other foreign produce		500
		6,500

The French perfumed spirits have almost displaced the British, the trade in them having steadily increased; they have also nearly displaced the German and American perfumes. Special efforts are being made to foster local production, as it is thought that perfumes may become an article of export in this Colony.

(*a*) Price.—For the same qualities French perfumes are cheaper than all others. The Germans send some very cheap descriptions of low quality.

(*b*) Quality.—The French perfumes are of excellent intrinsic quality, but it is doubtful whether they are better than the British. The German scents in this market are not of as high quality as the French and the British. The superiority of the French perfumes is in the "get up," which is dealt with under the head of "(*d*) Packing."

(*c*) Suitability.—Depends upon the "get up."

(*d*) Packing.—French perfumes are better boxed and "got up" than any others in this market; there is no comparison in regard to sightliness. Exquisite taste is displayed in the colours of the silk linings, the labels, and the stoppers, as also in the shapes of the packages and the bottles. Even the cheapest qualities are put up with the same artistic taste and care. Placed side by side with the French, British goods, though of equal quality, appear common and shabby, and a retail buyer will certainly choose the former. The British styles and patterns are those which have been offered for many years, and they are obsolete: few changes have been made to meet the demand for new fashions, and even if the styles were equal to the French, people would by this time have tired of them.

57. SPIRITS.—(*e*) Other.

	1884.	1889.	1894.
	£	£	£
Total imports	33,495	32,686	4,344
Foreign countries:—			
Belgium	140	245	—
China	1,251	1,899	230
France	19	492	73
Germany	493	15,783	161
United States	8,807	5,068	—
Total foreign	10,710	23,487	464

Estimate of Imports in 1894.

		£
Total as above	£4,344	
United States produce		2,000
German produce		500
Chinese produce		230
Other foreign produce		500
		3,230

This heading includes a variety of articles, such as painkiller, medicated spirits, Chinese spirits, &c. There is no single item of sufficient importance to demand description.

The rum and whisky imported are both British produce. They are not included in this return.

58. STATIONERY, OTHER THAN PAPER.—(*a*) Ink, Printing.

——	1884.	1889.	1894.
	£	£	£
Total imports	4,036	7,717	3,950
Foreign countries :—			
Belgium	80	120	—
France	—	2	—
Germany	461	384	280
United States	—	948	152
Total foreign	541	1,454	432

Estimate of Imports in 1894.

The above table correctly indicates the countries of produce.

The foreign importations consist principally of a few descriptions for special purposes which cannot be traced. The greater portion of the printing ink used is locally made.

58. STATIONERY, OTHER THAN PAPER.—(*b*) Playing Cards.

——	1884.	1889.	1894.
	£	£	£
Total imports	2,795	3,258	1,212
Foreign countries :—			
Belgium	256	405	77
France	148	12	5
Germany	189	689	130
United States	388	507	613
Total foreign	981	1,613	825

Estimate of Imports in 1894.

The above table correctly indicates the countries of origin.

Since 1894 the United States cards have displaced the British and other manufactures.

(*a*) Price.—Some samples, with prices attached, are forwarded. The prices of American cards are less than those of British of the same quality.

(*b*) Quality.—The importations from the United States embrace a wide range of qualities suitable to the general trade.

(*c*) Suitability.—The American cards are round-cornered; the British square-cornered. The American shape is preferred. The patterns of the American and British are about equal in quality.

(*e*) Other causes.—Not important.

58. STATIONERY, OTHER THAN PAPER.—(*c*) Other.

——	1884.	1889.	1894.
	£	£	£
Total imports	95,915	121,861	43,471
Foreign countries :—			
Belgium	121	1,180	260
China	99	175	106
France	317	515	63
Germany	2,142	13,439	4,294
Japan	—	4	39
United States	1,406	6,273	1,670
Total foreign	4,085	21,586	6,432

Estimate of Imports in 1894.

	£
Total as above - - £43,471	
Belgian produce - - - - -	400
German produce - - - -	7,000
United States produce - - - -	1,700
Other foreign produce - - - -	1,000
	10,100

The principal descriptions of stationery in which there is foreign competition are pencils and eraser tablets, besides the following fancy and other articles which have been included under the above heading, viz., Christmas cards, photograph albums, papeteries, school slates, luggage tags, eyelets, envelopes, show cards.

Pencils.—The greater part of the trade is with Germany. The German pencils are of good quality, quite equal to British pencils, and they are obtained in Nuremburg at 12*s.* 6*d.* per gross. Some samples with prices attached are forwarded.

Eraser Tablets of india-rubber and wood combined are mostly German; some are American. Samples, with prices attached, are forwarded.

Christmas Cards are of German manufacture. Many of them bear the names of British publishers, but the mechanical work is German. The designs in most cases appear to be British.

Photographic Albums are all made in Berlin and Frankfort. They are copies of British designs, and are cheaper than the originals. The qualities vary much.

Papeteries are bought direct from British manufacturers, but some of them have the appearance of French make. The German papeteries are not popular.

School Slates are now all imported from the United States. The American slates are of convenient shapes and sizes and good quality. Some samples, with prices attached, are forwarded.

Luggage Tags are all imported from the United States. The Americans excel in all goods made from Manilla paper.

Eyelets are nearly all of French manufacture.

Envelopes.—Ninety-five per cent. of the envelopes used are of local manufacture. The few imported (foreign) are odd lots, very often imported by foreign residents to suit their own tastes.

Show Cards, which British manufacturers send out here to advertise their goods, are generally marked "Made in Germany."

59. STONES AND SLATES.—Slate by Tale.

	1884.	1889.	1894.
	£	£	£
Total imports - - -	45,129	73,319	491
Foreign countries:—			
Germany - - -	—	17	—
United States - - -	15,177	28,742	50
Total foreign - -	15,177	28,759	50

Estimate of Imports in 1894.

The above table correctly indicates the countries of produce.

The imports of 1894 are no indication of the average trade. In that year building operations were at a stand-still, and importations had practically ceased. In a normal year the importations would be of the value of 50,000*l.*, and probably two-thirds of the trade would be with the United States.

(*a*) Price.—The price of United States slates in the yard in Melbourne at present is for Penryn, 20-in. × 10-in., 11*l.* 10*s.* per 1,000. Two samples, one of blue Bangor and one of Vermont green, are forwarded, both of which would now be worth that

price. The Welsh Penryn slate of the same size is at the same time quoted at 14*l.* per 1,000 (1,000 exact tally). Another quotation gives the price of the Penyrorsedd slate delivered at the wharf at 12*l.* 10*s.* to 13*l.* for 1,200, and the American slate at 9*l.* 10*s.* These prices are unusually high, owing to the fact that the stocks are principally in the hands of one merchant. Eighteen months ago the British slates were quoted at 9*l.* per 1,000, and American at 6*l.* per 1,000.

(*b*) Quality.—The American slates vary very much in colour, and in consequence of the number of kinds can scarcely be described. Some of them are, as far as durability is concerned, equal to the best Welsh slates, but the life of the ordinary American slate is said by judges to be about 30 years in this climate. The colours of American slates are equal to those of British, but they fade sooner.

(*c*) Suitability.—The American slates at the prices at which they are offered suit this market. They are considered good enough for the work for which they are required.

(*e*) Other causes.—The freight from the United States has quite lately been as low as 12*s.* per ton, but generally it is on an average from 15*s.* to 17*s.* 6*d.* The freight by British sailing ships from Liverpool to Melbourne is from 17*s.* 6*d.* to 20*s.* per ton, but varying very much.

British slates have lately been gradually rising in price in Great Britain, and American slates have also risen, but not to the same extent. A considerable reduction will be necessary to secure the present British trade and to recover that which is lost.

60. GRINDSTONES, MILLSTONES, AND OTHER SORTS OF STONES.—(*a*) Other Sorts of Stones, Wrought.

——	1884.	1889.	1894.
	£	£	£
Total imports	2,781	7,754	6,593
Foreign countries :—			
Belgium	—	514	1,614
France	11	22	—
Germany	—	120	1,784
Italy	—	104	674
United States	—	135	106
Total foreign	11	895	4,178

Estimate of Imports in 1894.

	£
Total as above - - £6,593	
Italian produce	1,000
Belgian produce	3,500
Other foreign produce	1,000
	5,500

The discrepancy between the statistical table and the estimate is caused by the fact that the Belgian marble is brought by German steamers, and has been entered as from Germany.

The greater part of the importations consists of mantelpieces. A few of these come from Italy, but the bulk is from Belgium.

(*a*) Price.—There are no standard lines for which prices can be quoted.

(*b*) Quality.—The greater part of the importations are of fair quality, the lower qualities being largely displaced by superior wooden mantelpieces.

(*c*) Suitability.—The Belgian goods suit the market better than the Italian, which they have almost displaced.

(*d*) Packing.—Satisfactory.

(*e*) Other causes.—The freight of cased stone goods is from 20*s.* to 25*s.* per ton from Antwerp.

60. Grindstones, Millstones, and other Sorts of Stones.—(*b*) Other Sorts of Stones, Unwrought.

——	1884.	1889.	1894.
	£	£	£
Total imports	3,773	5,078	1,620
Foreign countries:—			
Belgium	—	—	37
Germany	—	83	—
Italy	—	—	558
United States	—	91	106
Total foreign	—	174	701

Estimate of Imports in 1894.

	£
Total as above £1,620	
Italian produce	1,000
Other foreign produce	300
	1,300

The greater part of the importations consists of so-called Sicilian marble slabs quarried at Carrara, and shipped at Genoa by the North German Lloyd's line of steamers. At one time similar goods were shipped in London, but the opening of direct communication with Genoa has diverted the trade. The principal part of the business is still in the hands of British firms, and the goods are shipped by the foreign branches of their houses on consignment.

(*a*) Price.—The prices, delivered at the yards in Melbourne, are for—

	s.	d.	
Slabs, ¾-in.	0	9½	per foot square.
„ 1 „	1	1	„
„ 1¼ „	1	3	„
„ 1½ „	1	8½	„
„ 2 „	2	3	„
„ 2½ „	2	10	„
„ 3 „	3	3	„
„ 4 „	4	4	„
Blocks	11	0	per cubic foot.
Strips, 3½-in. by 3-in.	1	1	per lineal foot.
„ 4 „ 3 „	1	2	„
„ 4 „ 3½ „	1	3½	„
„ 5 „ 3 „	1	5	„

These prices are subject to 2½ per cent. cash discount.

(*b*) Quality.—The quality of Carrara marble is too well known to require description, and the only other unwrought stone in the market is not of much importance; it consists of small quantities of Aberdeen granite and coloured marbles from Belgium.

(*c*) Other causes.—Freight. Sicilian marble is brought from Genoa by the North German Lloyd's subsidised line of steamers at the rate of about 27*s.* 6*d.* per ton. This rate is too low to permit of the goods being shipped by way of England, although the rates thence by sailing ships would be much lower.

62. Telegraphic Wire and Apparatus, viz., Apparatus.

——	1884.	1889.	1894.
	£	£	£
Total imports	15,304	16,759	4,328
Foreign countries:—			
Belgium	540	677	415
France	341	1,490	—
Germany	1,037	2,320	622
United States	121	20	—
Total foreign	2,039	4,507	1,037

Estimate of Imports in 1894.

	£
Total as above - - £5,130*	
Belgian produce - - - - -	500
German produce - - - -	3,000
	3,500

Telegraphic wire is not included in the above, the importations being all of British produce.

The telegraphic system of this colony is in the hands of the Government, and nearly all the importations are for the Telegraph Department and are supplied by contract, the tenders being open to all the world. The instruments and much of the apparatus supplied under these contracts are of German manufacture. There is no "price" for these goods in Victoria, but the following are the rates at which the Government is supplied for the year ending 30th June 1896, the goods being deliverable in Victoria:—

* *Sic*, but apparently an error, as the "total as above" is 4,328*l*.

Telegraphic Instruments, &c.

(All articles to sample.)

		£	s.	d.
English condensers, 4·5 M.F. capacity, divided as per sample	each	8	10	0
Plugs for line switches - - - -	„	0	1	6

Main Batteries.

		£	s.	d.
Zincs, main, No. 10 gauge, sulphate magnesia - -	each	0	0	7½
„ gravity, rolled, No. 3 gauge - - -	„	0	2	6
Lead strips and attachments, sulphate magnesia - -	„	0	0	2
Zincs, local, No. 10 gauge, sulphate magnesia - -	„	0	1	1
„ Le Clanche - - - - -	„	0	0	2
Coppers, sulphate magnesia - - - - -	„	0	0	3
„ Callaud's battery - - - -	„	0	0	8
Ebonite sheet, all sizes up to 1½ in. - - - -	per lb.	0	3	9
„ stick, all sizes, round, up to 1½ in. diameter -	„	0	3	9
„ tube, all sizes, up to 1½ in. diameter, thickness of tube $\frac{1}{16}$th - - - -	„	0	5	0
„ tube, all sizes up to 1¼ in. diameter, thickness of tube $\frac{1}{8}$th - - - -	„	0	5	0
Ink—Telegraphic, prepared, Siemen's - -	per 2-oz. bot.	0	0	6
Insulators—Porcelain, German† - - -	per 100	2	15	0
„ Small, porcelain, single bell, with iron stems ·	„	1	15	0
Switches—Line, 6 block - - - - -	each	0	14	0
Platina—Wire, 14, 16, and 20 B.W. gauge - - -	per oz.	2	5	0
„ Sheet, Nos. 20, 22, 24 B.W. gauge - -	„	2	5	0
Screws—Binding, single - - - - -	each	0	0	2
Earth plates, mounted - - - -	„	0	7	6

German porcelain insulators to be packed in cases to contain not more than 100 insulators in each case.

Telegraphic Chemicals.

		£	s.	d.
Copper, sulphate of - - - -	per lb.	0	0	2$\frac{1}{32}$
Magnesia „ - - - - - -	„	0	0	1
Sal ammoniac - - - - -	„	0	0	4
Acid, sulphuric, in 56-lb. jars - - - -	„	0	0	2½
Bichromate of potash - - -	„	0	0	3

Insulated Copper Wire.

(All articles to sample.)

		£	s.	d.
"Office wire," 18 gauge (covered with india-rubber and plaited cotton, impregnated with white paraffin) - -	per lb.	0	1	5

		£	s.	d.
Earth-plate wire, No. 12 to 4 to 1 (insulated with gutta-percha and braided)	per lb.	0	2	6
Single, 18 to 8 to 4 (covered with gutta-percha and braided)	„	0	2	3
Double, 16 to 6 to 2 (covered with gutta-percha and braided)	„	0	2	3
Wire for transfer boxes (insulated with india-rubber and braided)	„	0	1	9
Copper wire, No. ·036 to ·020, silk (double covered)	„	0	3	0
„ No. ·018 to ·0124, silk (double covered)	„	0	4	0
„ No. ·0116 to ·0092, silk (double covered)	„	0	4	6
„ No. ·0084 to ·0076, silk (double covered)	„	0	8	0
„ No. ·0068 to ·0060, silk (double covered)	„	0	10	0
„ No. ·0052 to ·0048, silk (double covered)	„	0	13	0
„ No. ·0040 silk (double covered)	„	0	15	0

63. Umbrellas and Parasols.

	1884.	1889.	1894.
	£	£	£
Total imports	5,638	6,969	1,498
Foreign countries:—			
China	8	343	9
France	26	18	—
Germany	—	—	131
Total foreign	34	361	140

Estimate of Imports in 1894.

	£
Total as above £1,498	
French produce	300
German produce	300
Other foreign produce	100
	700

Nearly the whole of the umbrellas and parasols used are made in the Colony, and the few imported are special kinds, patterns, &c. The covering material used for umbrellas is British manufacture; that for parasols is imported from Great Britain, but much of it is of foreign manufacture. The materials imported separately are not included in the above tables.

64. Wood and Timber, Manufactured (Staves and Empty Casks, and Unenumerated).—(*a*) Staves and Empty Casks.

	1884.	1889.	1894.
	£	£	£
Total imports	3,013	4,407	1,775
Foreign countries:—			
Belgium	—	47	—
France	—	15	—
Germany	255	428	140
United States	1,785	2,692	612
Total foreign	2,040	3,182	752

Estimate of Imports in 1894.

	£1,775	£
Total as above		
German produce		800
United States produce		612
		1,412

The importation of empty casks has ceased.

That portion of the trade in staves which is not intercolonial is German and American. There are no British oak staves or headings in the market. Victorian and Tasmanian blackwood is used for tallow and other similar casks, New Zealand kauri for fermenting vats, and German and American oak for wine-cellar casks and hogsheads, quarter-casks, and kegs for the wine trade. No dressed staves are imported. The supply of casks for the brewing and the spirit trade is the empty vessels in which spirits, &c. have been imported.

(*a*) Price.—American oak for vat-making is 18*l.* to 20*l.* per 1,000 superficial feet, and German from 20*l.* to 25*l.* per 1,000 superficial feet, according to quality.

(*b*) Quality.—The foreign oaks in use are of fair quality.

(*c*) Suitability.—An opinion has been expressed here that British oak is not suitable for casks, but is very suitable for vats.

(*e*) Other causes.—The freight is less from the United States than from Germany. If British oak were shipped in sailing vessels the freight would probably be 8*s.* to 10*s.* per 1,000 superficial feet less than from the United States.

64. WOOD AND TIMBER, MANUFACTURED (STAVES AND EMPTY CASKS, AND UNENUMERATED).—(*b*) Mouldings.

	1884.	1889.	1894.
	£	£	£
Total imports	6,872	12,259	4,448
Foreign countries:—			
Belgium	—	—	538
Germany	1,630	5,078	2,348
United States	—	34	584
Total foreign	1,630	5,112	3,470

Estimate of Imports in 1894.

	£4,448	£
Total as above		
German produce		3,500
United States produce		584
Other foreign produce		200
		4,284

The above contains picture frames and decorative mouldings only. Builders' mouldings are not imported.

(*a*) Price.—The price of German mouldings is somewhat less than that of those from the United States. There are no British in the market for comparison. Some samples of German gilt mouldings, with prices marked thereon, are forwarded.

(*b*) Quality.—The Germans send a large range of qualities, the Americans a somewhat less extensive range, the lowest qualities being almost all German.

(*c*) Suitability.—The German goods suit this market, the demand being principally for inferior to medium quality gilt, for framing oleographs, prints, advertisements, &c. The only moulding of British make which is sent to this Colony is maple, or imitation maple.

(*d*) Packing.—No important difference.

(*e*) Other causes.—Not important.

64. WOOD AND TIMBER, MANUFACTURED (STAVES AND EMPTY CASKS, AND UNENUMERATED).—(*c*) Carriage Woodenware.

——	1884.	1889.	1894.
	£	£	£
Total imports - - -	900	5,530	2,058
Foreign countries:—			
Belgium - - - - -	—	—	22
Germany - - - -	—	—	35
United States - - - -	73	2,488	978
Total foreign - -	73	2,488	1,035

Estimate of Imports in 1894.

The above table correctly indicates the countries of produce.

Dressed wood for carriage building is included under the heading "Woodenware" in the Victorian returns. The above consists wholly of undressed spokes, felloes, rims, shafts, &c.

The trade, except that with the other Australian colonies, is American, the only exceptions being lancewood shafts and ash felloes, which are imported in small numbers from Great Britain. The American trade is in hickory and elm woods, which are, for the most part, imported in the rough and finished in the Colony.

64. WOOD AND TIMBER, MANUFACTURED (STAVES AND EMPTY CASKS, AND UNENUMERATED).—(*d*) Unenumerated.

——	1884.	1889.	1894.
	£	£	£
Total imports - - -	50,604	77,352	24,598
Foreign countries:—			
Belgium - - -	8	56	165
China - -	888	1,061	294
France - - - -	175	762	15
Germany - -	755	5,309	710
Italy - - -	—	45	—
Japan - - -	80	45	27
United States - -	20,427	33,894	13,999
Total foreign - -	22,333	41,172	15,210

Estimate of Imports in 1894.

	£24,598	£
Total as above - -		
German produce - - - -		1,000
Chinese produce - - - -		294
United States produce - - -		18,000
Other foreign produce - - - -		500
		19,794

A very large portion of the trade is with the United States. Handles of all kinds, buckets, clothes pegs, and dressed timber for carriages are purely American manufactures, with no rivals in this market. No item can be named in which there is actual or probable competition, and for which prices and particulars can be given.

Perambulators were at one time imported from Great Britain, but are now almost wholly imported from America. The light style of the American is preferred here to the darker-coloured and heavier-built British manufacture.

VICTORIA.

Wooden Toys are nearly all German. A few toys, carts, &c., are received from the United States, and the British send some of the better-class articles, such as rocking-horses.

Nearly all woodenware is received from the countries in which the wood used is a natural product.

66. WOOLLEN AND WORSTED YARNS.

Included in this return under the heading of "Haberdashery."

67. WOOLLEN AND WORSTED MANUFACTURES.—(*a*) and (*b*) Heavy Broad and Narrow Cloths, and Worsted Coatings.

	1884.	1889.	1894.
	£	£	£
Total imports	437,502	484,503	165,720
Foreign countries:—			
Belgium	8,584	864	208
China	—	489	—
France	5,465	1,503	618
Germany	789	5,321	3,352
Total foreign	14,838	8,177	4,178

Estimate of Imports in 1894.

		£
Total as above	£165,720	
Belgian produce		500
French produce		618
German produce		9,000
		10,118

Worsted coatings is one of the only kinds of heavy woollen manufactures of which the foreign manufacture has not gone out of consumption in the Colony, and even of this description much the greater part of the importations is British. The foreign worsted coatings now in the market are principally German.

The statistics do not give the value of worsted coatings separately; they are included with heavy broad and narrow cloths. The total imports may reach about 60,000*l.*, and the foreign alone about 6,000*l.* The foreign trade is declining.

(*a*) Price.—The price is probably about equal to that of British goods of the same class.

(*b*) Quality.—The sterling quality is inferior to that of most British goods of the same price; but the inferior German worsteds are more finely dyed and finished than British goods of the same class. This is the case in regard to most inferior German fabrics.

(*c*) Suitability.—The goods are to some extent suitable to the market, as is shown by the fact that there is still a certain demand for them. The patterns are in some demand; but they are largely copied from the British.

(*d*) Packing.—The difference of packing is not important in regard to this item.

(*e*) Other causes.—There is no false marking; but it appears likely that after importation the German marks are removed to counteract the prejudice which certainly is felt in regard to German goods of this description.

The Germans are more energetic than the British in fostering their trade in this Colony. Woollen fabrics are consigned to agents in Victoria for sale, whilst British goods must be bought in Britain. The German seller approaches the buyer, whilst the British manufacturer to a greater extent waits for orders.

With regard to heavy cloths, both broad and narrow, it is estimated that less than 5 per cent. of the importations are German.

67. WOOLLEN AND WORSTED MANUFACTURES.—(*a*) and (*b*) Light Broad and Narrow Cloths, and Worsted Stuffs.

——	1884.	1889.	1894.
	£	£	£
Total imports - - -	319,357	348,211	239,099
Foreign countries :—			
Belgium - - - -	71	1,684	—
France - - - -	8,958	2,588	1,437
Germany - - - -	504	9,348	6,208
Total foreign - -	9,533	13,620	7,645

Estimate of Imports in 1894.

		£
Total as above - -	£239,099	
French produce - - - - -		75,000
German produce - - - - -		25,000
Other foreign produce - - - - -		15,000
		115,000

A large quantity of the plain dress materials used in this Colony are British. The British articles imported consist principally of union serges, union cashmeres, and all plain unions, tweeds, alpacas, mohairs, habit cloths, vicunas, cheap crêpons, and wool tarlatans. The foreign articles imported are the better crêpons, matelasses, amazons, fancy silk mixtures, nuns' veilings, astracans, cashmeres, camel-hair cloths, and delaines; these are nearly all French. Austria sends some cheap tweeds, and Germany imitations of many of the French and English goods. British trade has recovered a little lately.

(*a*) Price.—Some samples, with prices marked, are forwarded.

(*b*) Quality.—British plain goods are of good quality, but in nearly all the lines imported French goods are superior to British; they are beautifully woven, and soft in finish. British goods of all wool are as hard as French unions.

(*c*) Suitability.—French dress goods are suited to the requirements of this market. The British have departed little from their own styles; they have not adopted the newest machinery nor studied the changing fashions, whereas the French are continually introducing new patterns and designs to suit the ever-changing taste in this description of merchandise. Fully 90 per cent. of the novelty fashions are French.

(*d*) Packing.—Not important.

(*e*) Other causes.—Not important.

67. WOOLLEN AND WORSTED MANUFACTURES.—(*f*) Carpets and Druggets.

——	1884.	1889.	1894.
	£	£	£
Total imports - - - -	79,685	124,951	30,056
Foreign countries :—			
China - - - -	—	39	77
France - - -	107	15	92
Germany - - -	97	172	—
Japan - - - -	—	—	47
United States - - -	45	—	—
Total foreign - -	249	226	216

The above table correctly indicates the countries of produce.

There is scarcely at present 5 per cent. of foreign importations, but American carpets have lately been introduced into the market. They are of showy designs, which may become popular, but they are said to be much inferior to the British in quality.

The Japanese are sending to this market some imitations of Persian carpets. They are not of wool, but they enter into competition with woollen carpets.

SUMMARY OF THE IMPORTS DEALT WITH IN THIS RETURN.

Total in 1884 -	£6,691,841	
From foreign ports - - - -		£526,069
Percentage of the value of goods from foreign ports on the value of the total imports - - -		7·86
Total in 1889 - -	£9,379,679	
From foreign ports - - - -		£1,047,913
Percentage of the value of goods from foreign ports on the value of the total imports - - -		11·17
Total in 1894 - -	£4,111,459	
From foreign ports - - - -		£517,232
Percentage of the value of goods from foreign ports on the value of the total imports - - -		12·58

Estimate for 1894.

Total imports - -	£4,146,556	
Foreign produce - - - -		£1,370,843
Percentage of the value of foreign produce on the value of the total imports - - - -		33·06

The foreign importations in 1894 consisted of—	£
Belgian produce - - - -	81,209
French produce - - - - -	331,174
German produce - - - -	553,538
United States produce - - -	216,355
Other foreign produce - - -	188,567
	1,370,843

Enclosure 2 in No. 23.

REPORT of the SPECIAL SUB-COMMITTEE of the GEELONG CHAMBER OF COMMERCE and MANUFACTURES appointed to deal with the Despatch from the Secretary of State for the Colonies, dated London, November 28, 1895.

No. in Annexe I.	Article.	Information afforded.
1	Alkali - - -	The only information elicited was that the largest quantity came from Great Britain.
3	Apparel and slops -	Imports are much restricted in consequence of the high protective duties.
4	Arms and ammunition -	*Firearms (small).* *Principal item, Sporting Guns* imported from Belgium, more especially those of cheap make; better qualities are imported from England. It was found that there was an increase of imports from Germany of these articles, the reason being that buyers preferred to give a lower price, and that three-fourths of the storekeepers selling the article were not iron mongers and could not discriminate between the superior and inferior qualities, they being simply satisfied to be placed in a position to supply cheaply. *A member of the Committee here pointed out that one reason why the Germans obtained a considerable portion of the trade of the Colonies was that they sent representatives to ascertain the requirements of the Colonial purchaser, and if they observed any article of commerce which they were not already supplying, they thereupon took steps to improve upon it and supply it at a cheaper rate. They also took much greater care with the packing of the goods, consequently there was very much less breakage.
6	Beers and ales - -	Our experience goes to show that the consumption of the imported article is practically restricted to British beers, with the exception that a fair quantity of lager beer finds a considerable market here.
16	Chemical products and dyestuffs.	To a very large extent these are imported from Germany, and the trade is an increasing one, owing to the lower prices; consequently those of English manufacture are being displaced.
18	Clocks and watches -	It is found that an increasing quantity of these articles is being imported from Germany, Switzerland, and America. In the case of the latter country the imports therefrom are increasing rapidly, cheapness being the reason.
24	Earthenware and chinaware	In these articles Germany and Japan divide the trade with Great Britain, particularly in low-class goods. The packing of these goods from the countries mentioned is better and the prices lower than for the British article; the colours and patterns seem to "catch on," and they are more saleable.
30	Hardware and cutlery:	
	(*a*) Black fencing wire, barbed wire.	*Black Fencing Wire* is imported almost exclusively from Germany and Belgium, only a little from England. *Barbed Wire* is imported from Germany and America. The import of English has fallen off owing to Colonial production and the lower prices of American and German.
	(*b*) Enamelware -	*Enamelware* is largely imported from Germany, owing to the cheapness; the quality is very fair.
	(*c*) Tools, &c. -	*Tools* are imported from Germany. *Shovels, Rakes, Spades, Hoes, &c.* from America. Also many castings from America, owing to finish.
	(*d*) Iron - -	*Iron.*—Bar, sheet, plate, hoop, are still principally imported from England, although Germany is now coming into this market with goods of fair quality and is endeavouring to secure a trade.
	(*e*) Tinned plates -	*Tinned Plates.*—England still has this trade.
	(*f*) Zinc, sheet and perforated.	*Zinc Sheet.*—Belgium has the sheet-zinc trade. The perforated zinc trade is divided between Belgium and England.
	(*g*) Iron, galvanised and corrugated.	The trade in galvanised and corrugated iron is still retained by England. Considerable improvement might be made by English makers in packing and boxing their goods; as it is, their methods compare most unfavourably with German and American makers.
	(*h*) Files - -	*Files* are now largely imported from America, the machine-made article from that country replacing the English hand-made to a very large extent. The American article is both good and cheap. In certain makes England still retains her trade with this Colony.
	(*j*) Saws - -	*Saws.*—This trade is principally divided between England and America.
	(*k*) Hollowware -	*Hollowware in Cast.*—This trade is retained by England.
	Cutlery - - -	English cutlery holds its own by reason of manufacturers having laid themselves out to suit the demands and requirements of our market.

* This information may be read to be of *general* application.

No. in Annexe L	Article.	Information afforded.
37	Machinery - -	A large quantity is imported from America, as it is found more suitable to our local conditions, but it is not so durable as the English make, being lighter in draught.
39	Medicines (chemicals used for).	These are more largely imported from Germany and America, owing to the fact that they are pushed by agents from these countries, who spend more money in introducing them. It is suggested that British manufacturers of these articles should visit these Colonies and ascertain our requirements.
41	Musical instruments -	Nearly all pianos sold in these Colonies are of German make, owing to the fact that they are of better value, particularly in the lower grades. Importations from England are restricted to three English makers, whose prices are high and their sales small. Cabinet organs are exclusively imported from America.
42	Oil and floor cloths - -	Our local experience is, that the oil and floor cloth sold is almost exclusively of British manufacture.
48	Plate and plated ware -	The high-class qualities of these articles are imported from England, but medium and low-grade qualities are imported from Germany and America, chiefly the latter.
54	Silk manufacture - -	*Broad Piece Goods.*—Continental manufacturers divide this trade with British traders. *Ribbons.*—These are imported largely from Germany, displacing those of British make.
58	Stationery, other than paper.	What may be called manufactured stationery, such as account books, envelopes, &c., &c., is largely made in the Colony, the high duties almost completely shutting out the imported article. The great bulk of stationery not made up here is supplied from Great Britain; there are, however, several lines imported from other countries, in which the following are included:— *Albums, Photo*, *Albums, Scrap* } made in Germany. *Purses* are largely made in France, especially the cheaper lines. *Lead Pencils.*—English goods have been almost entirely displaced by German and American goods, which are cheaper and put up in more attractive form. *Pencil Cases*, *Penholders* } are largely imported from Germany. *Rubber Goods* of the finer kinds, such as elastic bands, erasers, &c., are manufactured in America and Germany. *Birthday Cards*, *Christmas Cards*, *Booklets* } These are usually designed in England and printed in Holland and Germany, where colour printing has become a fine art. *Slates* are supplied chiefly from America; they are of neater make and cheaper than Welsh, although the quality of the slate is not so good.
63	Umbrellas and parasols -	The material for these is imported mostly from the United Kingdom, and they are completed here.
67	Woollen and worsted manufactures.	The Continent divides this trade with Great Britain, but there are also considerable quantities manufactured in the Colony, such as tweeds, coatings, flannels, and blankets.

General Information.

Metallic Capsules for Bottles.—It has come under our notice that a French house has now a representative visiting these Colonies, and who has, we learn, secured large orders. Merchants tell us that this is entirely a new departure, it having been their custom to invariably obtain their supplies from Great Britain.

Picture-Frame Moulding.—This trade now appears to be entirely lost to British exporters, the trade having gone to Germany and America. The quality of the moulding now in use here is distinctly better, the patterns more artistic, and the price lower. This information will be fully borne out by London houses.

Mr. Chamberlain's Despatch.

Clause 4a.—The Messageries Maritimes Co. and the Norddeutscher Lloyd—though to what extent is unknown to us—are subsidised by their respective Governments, while the lines of the P. & O. and Orient Companies (irrespective of mail contracts) have no assistance. Evidence was tendered that freight had consequently been obtained at lower rates from Hamburg than London.

We have reason to believe that it is customary for American shippers to obtain rebates from their Customs department on certain goods exported.

Clause 4b.—Quality and Finish.—References have been made already under various heads, but too great stress cannot be laid upon the importance of maintaining an attractive appearance in all merchandise designed for this market.

Clause 4c.—It will be learned that our evidence discloses the fact that foreign manufacturers are specially on the alert to suit their goods to the tastes and requirements of our buyers and consumers.

Clause 4d.—This has been prominently brought out in the details of our report, and can be summarised as follows:—Continental, Japanese, and American shippers pack more carefully and economically than most British houses, resulting, consequently, in the goods arriving in better order and condition.

M. CONRAN,
President.
EDWARD BECHEWAISE,
Secretary.

Enclosure 3 in No. 23.

DEAR SIR, Geelong, May 28, 1896.

MY Chamber has been favoured by the London Chamber of Commerce with a reprint of the despatch of 28th November last, from the Secretary of State for the Colonies to all Governors of British Colonies, and has also (as already acknowledged) your letter of 26th February last, with copy of a communication from the Colonial Office to the Agent-General of Victoria, which advises that Mr. Chamberlain has in contemplation a further despatch in order to ascertain what products of the Colonies might be exported that at present do not find a market in the United Kingdom.

Feeling that no effort should be spared through which it might be possible to increase our exports, I am directed by the Special Sub-Committee appointed by this Chamber to deal with the subjects to state that it is hoped in due course to provide you with some information that may assist Mr. Chamberlain in his laudable effort to stimulate production; in the meantime, however, I am requested to inform you that the Sub-Committee have first undertaken to deal with the question as described in the second paragraph of the despatch, and appended hereto is a *résumé* of the evidence tendered.

You will notice that in supplying the information, the form we have chosen differs from that suggested by the Colonial Secretary's Department, but, being a comparatively small community, with restricted transactions in many articles such as are enumerated in the several annexes given in the schedule, it has seemed to my Committee more desirable that they should hand to you, for transmission to Mr. Chamberlain, a simple return giving the individual opinions and experiences of our merchants and retailers, without attempting to go into the question of values, quantities, and statistics—being satisfied that your own departmental officers can give such information, and that any estimates from here would therefore be unnecessary. My Committee have but little doubt also that very full information will be afforded you by Melbourne traders and merchants.

The efforts of the Secretary of State to promote increased trade between Great Britain and her Colonies is much appreciated by this community and my Committee, and it is sincerely to be hoped that one result of his effort will at least be to arrest the increasing quantities of foreign goods now being imported into this Colony; and, surmising that it is the intention of Mr. Chamberlain to bring under the notice of British manufacturers the information now being prepared for him, my Chamber realises that the very best means are being adopted to produce the results so much desired.

I have pleasure in sending you a duplicate copy of this communication, which will allow of your sending to the Secretary of State my original letter.

I have, &c.,
EDWARD BECHEWAISE,
Secretary.

QUEENSLAND.

No. 24.

LORD LAMINGTON to MR. CHAMBERLAIN.

(Received December 28, 1896.)

SIR, Toowoomba, November 11, 1896.

IN reply to your Despatches, dated 28th November 1895 and 31st December respectively, with reference to the mutual trade of the United Kingdom and the Colonies for British producers and manufacturers, I have the honour to forward herewith, for your information, copies of documents, for any action you may think necessary in the matter.

I have, &c.,
LAMINGTON.

Enclosure in No. 24.

(Extract.) Chief Secretary's Office,
Brisbane, October 15, 1896.

I HAVE the honour to acknowledge the receipt from your Excellency of a Circular Despatch from the Right Honourable the Secretary of State for the Colonies, dated 28th November 1895, in which Mr. Chamberlain states that he is impressed with the importance of securing as large a share as possible of the mutual trade of the United Kingdom and the Colonies for British producers and manufacturers, whether located in the Colonies or in the United Kingdom, and in which, with a view, in the first place, to a thorough investigation of the extent to which in each of the Colonies foreign imports of any kind have displaced, or are displacing, similar British goods, and of the cause of such displacement, he invites the assistance of this Government in obtaining a return containing certain particulars relative to the importation into this Colony of various articles from foreign countries, and showing the reasons which have in each case induced the Colonial importer to prefer a foreign article to similar goods of British manufacture.

I have also received Mr. Chamberlain's Despatch of 31st December last, transmitting a copy of a letter addressed by Lord Selborne to the Agent-General for Queensland, in which, with reference to the further Despatch which the Secretary of State has in contemplation, asking for a return of any products of the Colonies of the British Empire, which might advantageously be exported to the United Kingdom or other parts of the Empire, but which do not at present find a market there, it is requested that advice be given by this Government as to the form which the suggested return should take.

I now enclose for your Excellency's information, and for transmission to the Secretary of State, a copy of a report which has, in accordance with my instructions, been furnished by the Collector of Customs of this Colony, in which information is given on the questions raised by Mr. Chamberlain in the first of the Despatches above referred to. The particulars are, owing to the manner in which the statistics of the Customs Department have hitherto been kept, necessarily somewhat imperfect so far as the special object now in view is concerned. But a new system has been initiated, whereby the statistical returns will, as from the 1st of January next, indicate the country of origin in respect of all merchandise imported into this Colony from foreign countries by way of Great Britain or through any of the neighbouring Colonies, as well as its actual value, including transit charges, when landed in Queensland ports. When the new method of compilation has been in force for a period sufficiently extended to enable a reliable computation to be made, information of the nature now desired can be given with far greater accuracy. In the meantime, although the actual figures can hardly be accepted as affording a trustworthy indication of the volume of foreign as compared with British trade in these Colonies, the deductions made by Mr. Irving from the facts adduced will, I venture to think, be not without value. Some further evidence bearing on the question now referred to is contained in the accompanying memorandum from my colleague, the Secretary of Agriculture.

The COLLECTOR of CUSTOMS to the TREASURER of QUEENSLAND.

H.M. Customs, Queensland,
Brisbane, August 6, 1896.

SIR,

I HAVE the honour to forward herewith the Return asked for in Mr. Chamberlain's despatch to Governors of the Colonies, on the question of trade with the United Kingdom, and to report thereon as follows:—

From the manner in which the Statistical Returns are kept in this Colony, they supply only to a limited extent, and imperfectly as far as they go, the information asked for.

As a basis to work upon (the only one available) for the purpose of ascertaining the value, or an approximate value, of goods imported by this Colony, of foreign manufacture, as compared with that of goods of British manufacture, our Statistical Reports are, in my opinion, altogether insufficient. They only give the value of goods of foreign manufacture when imported direct, and in the case of Queensland, a considerable portion of the goods imported, being the products or manufactures of foreign countries, comes through New South Wales and Victoria, and appears as imports from these Colonies, whilst the great bulk of such manufactures and products comes through London, and is invoiced from that centre, and appears as imports from Great Britain.

Under these circumstances it follows:—

1. That many of the articles mentioned in Annexe II. in the despatch referred to are excluded from our returns, because it does not appear from our statistical records that the percentage of the value of such articles imported from foreign countries is as much as 5 per cent. of the total value of the importation of the said articles from all sources, although the percentage of the value of the said foreign articles as compared with the value of our importations of the same, of British manufacture, may, in reality, be very much higher.

2. That when the percentage of the value of the foreign article is shown by our records to be 5 per cent. or more of the value of the total imports, and the article thus gets a place in our returns, the percentage should probably be very much higher than that stated, and to that extent our returns will be inaccurate, and consequently misleading.

I think it hardly practicable to compile satisfactory returns, such as are required, from information obtainable from outside sources, as to our importations of the majority of the various articles enumerated in Annexe II.

Each importer could only give an idea, based on individual transactions, and the result of inquiries made in this way would be, in many cases, contradictory and difficult to summarise, and at the best, to a great extent speculative and unreliable.

It must be taken into consideration that facilities for shipping to this Colony from London are much greater than from Continental ports, and that foreign goods, being for the most part shipped *viâ* London, are subject to the additional expense of transport thither and charges there. To this extent the English manufacturer has in the meantime an advantage over Continental competitors; but if the position in this respect were equalised, some of the goods of English manufacture, which at present are barely holding a footing in this market, would, under such altered conditions, in all probability be entirely displaced.

The tendency is increasingly in favour of cheapness, and whilst articles of British manufacture may be the best of their kind, so far as stability and excellence of workmanship are concerned, their dearness (although in reality they may be better value to the consumer) restricts demand and retards expansion of business. The demand now runs on the medium and the cheaper classes of goods, and on this line other countries, notably Germany and America, are working, and are producing articles of modern pattern, excellent in style and finish, as well as implements and mechanical appliances, embracing the most recent improvements and suited to the requirements of the Colony, at prices which command a ready market.

I have not given prices in the return, as, with the exception of bulk goods, such as cement, salt, &c., quotations would be valueless for any practical purpose.

I have, &c.,

W. H. IRVING,
Collector of Customs.

RETURN showing, for the Years 1884, 1889, and 1894, the VALUE of the undermentioned ARTICLES IMPORTED into the COLONY of QUEENSLAND from FOREIGN COUNTRIES, the VALUE of which was 5 per cent. or upwards of the TOTAL VALUE of the ARTICLE IMPORTED from all sources, whether within or without the BRITISH EMPIRE, and when the TOTAL VALUE of the ARTICLE IMPORTED was not less than 500*l.*; also, giving the reasons, as far as can be ascertained, which have induced the IMPORTER to prefer a FOREIGN ARTICLE to similar GOODS of BRITISH MANUFACTURE.

Class No.	Commodity.	1884.			1889.			1894.			Estimated Percentage Value of Goods Imported from Foreign Countries, and Reasons for Preference for Foreign Article.
		Total Value of Imports.	Value of Imports from Foreign Countries.		Total Value of Imports.	Value of Imports from Foreign Countries.		Total Value of Imports.	Value of Imports from Foreign Countries.		
		£		£	£		£	£		£	
1	Alkali—soda crystals	—	- - -	—	909	Germany - -	66	—	- - -	—	
4	Arms and ammunition :—										
	(*a*) Ammunition -	—	- - -	—	4,893	Germany - -	16	2,281	U. S. of America -	296	80 per cent. from America, principally cartridges for rifles and revolvers of American manufacture.
						U. S. of America -	444				
	(*b*) Detonators -	—	- - -	—	3,927	Germany - -	433	1,823	Germany -	150	75 per cent. from Germany.
	(*c*) Firearms -	—	- - -	—	9,078	France - -	173	2,464	France - -	41	80 per cent.; cheapness.
						Germany - -	352		Germany - -	163	
						U. S. of America -	1,060		U. S. of America -	528	
									Belgium - -	17	
	(*d*) Dynamite -	—	- - -	—	40,049	Germany - -	7,0[illegible]3	42,321	Germany - -	4,992	50 per cent. from Germany.
5	Bags (empty) :— Woolpacks - -	12,317	Java - -	807	—	- - -	—	—	- - -	—	All from Calcutta.
9A	Brushware - -	7,676	Austria - -	11	13,070	Germany - -	290	13,823	Germany - -	404	60 per cent. from Germany and France, being the cheaper classes of brushware. A small percentage (millet brooms) from Italy and America.
			U. S. of America -	380		U. S. of America -	493		U. S. of America -	876	
									France - -	141	
									Italy - -	1,222	
12	Caoutchouc, manufactures of.	—	- - -	—	5,6[illegible]86	Germany - -	207	1,541	Germany - -	243	
						U. S. of America -	98		U. S. of America -	19	
14	Cement - -	—	- - -	—	39,118	U. S. of America -	218	—	- - -	—	80 to 90 per cent. from Germany, equal in quality and cheaper.
						Germany - -	9,168				
18	Clocks and watches -	—	- - -	—	15,356	U. S. of America -	1,760	11,658	U. S. of America -	1,792	90 per cent. of clocks from America, owing to their cheapness and suitability for wooden houses.
						France - -	33		France - -	188	
						Germany - -	52		Germany - -	545	
									China -	17	60 per cent. of watches from America, France, and Switzerland; finish and cheapness.
20	Cordage and rope -	—	- - -	—	-	- - -	—	4,226	China - -	312	
21	Corn—maizena and cornflour.	4,96[illegible]	U. S. of America -	2,076	4,117	U. S. of America -	1,643	5,073	U. S. of America -	375	

25	Fish :—											
	(*a*) Lobsters -	1,033	U. S. of America -	265	1,680	U. S. of America -	1,038	714	U. S. of America -	248		
	(*b*) Salmon -	11,076	U. S. of America -	755	12,797	U. S. of America -	4,510	7,164	U. S. of America -	2,091	} Nearly all American.	
	(*c*) Oysters - -	1,105	U. S. of America -	484	1,748	U. S. of America -	1,034	792	U. S. of America -	353		
	(*d*) Salted and dried	—	- - -	—	6,861	U. S. of America -	541	—	- - -	—		
26	Furniture, cabinet and upholstery wares.	57,577	Austria - -	56	76,897	Java - -	178	18,912	Java - -	28	25 per cent., being chairs only, from America and Austria.	
			China - -	47		Japan - -	40		Japan - -	301		
			U. S. of America -	3,426		Germany -	7,482		Austria - -	168		
						U. S. of America -	3,279		U. S. of America -	3,965		
									China - -	277		
27	Glass :—											
	(*a*) Window - -	—	- - -	—	—	- - -	—	1,804	Germany - -	190	Excepting plate glass (which is nearly all from Great Britain) 80 to 90 per cent. is from Belgium and Germany; cheaper.	
	(*b*) Bottles -	—	- - -	—	—	- - -	—	6,581	Germany - -	122	75 per cent. German; cheaper.	
									U. S. of America -	254		
	(*c*) Ware - -	—	- - -	—	18,761	Germany - -	1,892	11,051	Germany - -	324	50 to 75 per cent. German; cheaper.	
						Austria - -	37		Belgium - -	21		
						U. S. of America -	572		U. S. of America -	2,006		
28	Grease, tallow, and animal fat.	—	- - -	—	697	U. S. of America -	208	955	U. S. of America -	312	75 per cent., axle grease and other lubricants, from America.	
29	Haberdashery and millinery :—											
	Hosiery - -	—	- - -	—	—	- - -	—	44,112	Germany - -	3,244	50 to 60 per cent. cotton hosiery, and 10 per cent. woollen hosiery from Germany. The cotton hosiery is cheaper, and the get up is more attractive.	
30	Hardware and cutlery :—											
	(*a*) Hardware and ironmongery.	260,084	U. S. of America -	20,718	190,844	U. S. of America -	19,994	76,885	U. S. of America -	5,754	60 to 70 per cent. German; finish and cheapness.	
			South Sea Islands -	85		Germany - -	2,393		Germany - -	1,028		
						France - -	68					
	(*b*) Holloware -	—	- - -	—	—	- - -	—	7,680	Germany - -	643	85 per cent., being principally enamelled ware from Germany.	
	(*c*) Tinware -	—	- - -	—	—	- - -	—	3,699	U. S. of America -	208	6 per cent. American.	
	(*d*) Nails -	—	- - -	—	—	- - -	—	9,798	U. S. of America -	38	90 per cent. from Germany (principally wire nails).	
									Germany - -	684		
									Belgium - -	319		
32	Implements and tools of industry :—	4,204	U. S. of America -	609	7,865	U. S. of America -	2,352	13,383	U. S. of America -	3,540	75 per cent. American, owing to their cheapness and adaptability to the requirements of the Colony.	
	(*a*) Agricultural implements.	8,723	U. S. of America -	1,600	58,814	U. S. of America -	17,576	49,840	U. S. of America -	10,799	Axes, 95 per cent.; hammers, 75 per cent., saws, files, joiners' tools, &c., 80 to 50 per cent., American, with a strong tendency in their favour on account of quality, finish, and cheapness.	
						Germany - -	304		Germany - -	563		
	(*b*) Tools -								Belgium - -	7		

Class No.	Commodity.	1884. Total Value of Imports.	1884. Value of Imports from Foreign Countries.		1889. Total Value of Imports.	1889. Value of Imports from Foreign Countries.		1894. Total Value of Imports.	1894. Value of Imports from Foreign Countries.		Estimated Percentage Value of Goods Imported from Foreign Countries, and Reasons for Preference for Foreign Article.
		£		£	£		£	£		£	
33	Instruments and apparatus:—										
	(a) Surgical	—	- - -	—	—	- - -	—	1,166	Germany - -	189	German and American. (Dental, principally American.)
									U. S. of America -	402	
	(b) Optical	—	- - -	—	—	- - -	—	1,227	Germany - -	28	40 to 50 per cent. Continental and American.
									France - -	47	
34	Leather:—										
	(a) Unwrought	21,992	U. S. of America -	1,186	—	- - -	-	23,885	U. S. of America -	1,208	50 to 60 per cent. American, and 30 per cent. French and German; attractive appearance and cheapness.
									Germany - -	573	
									France - -	146	
	(b) Wrought, boots and shoes.	—	- - -	—	145,740	Germany - -	13,091	—	- - -	—	45 per cent. Continental and American, the latter increasing rapidly in favour on account of their style, finish, and general suitability.
						Austria - -	280				
	(c) Wrought, other sorts.	—	- - -	—	—	- - -	—	7,489	Germany - -	591	
									U. S. of America -	77	
37	Machinery (all)	—	- - -	—	166,052	Holland - -	83	—	- - -	—	
						Germany - -	164				
						U. S. of America -	8,902				
39	Medicines:—										
	(a) Drugs	—	- - -	—	26,097	Italy - -	95	—	- - -	—	30 to 40 per cent. from Germany and France.
						U. S. of America -	1,241				
	(b) Druggists' Wares (including patent medicines and druggists' sundries).	—	- - -	—	42,799	Italy - -	109	—	- - -	—	25 to 30 per cent. Continental.
						U. S. of America -	2,499				
40	Metals:—										
	(a) Iron wire	—	- - -	—	43,691	U. S. of America -	1,545	48,605	U. S. of America -	3,120	75 to 80 per cent. from Germany and Belgium, of equal quality; cheaper.
						Germany - -	853		Germany - -	3,426	
	(b) Railway rails	—	- - -	—	—	- - -	—	9,688	Germany - -	1,469	
41	Musical instruments	30,614	Germany - -	170	35,126	Germany - -	13,755	15,172	Germany - -	2,563	75 per cent., principally German.
			U. S. of America -	2,481		U. S. of America -	656		France - -	98	
									Belgium -	96	
									U. S. of America -	168	
45	Paper (other than Hangings).	—	- - -	—	—	- - -	—	58,223	Germany - -	1,569	Web newspaper, 90 per cent. from America and the Continent of Europe, other paper from Great Britain.
									Belgium - -	99	
									U. S. of America -	2,286	
									Japan -	26	

		£		£	£		£	£		£	
47	Pictures	—	—	—	3,006	Germany	241	1,852	Germany U. S. of America	44 166	20 per cent., cheap pictures, principally German.
48	Plate and plated ware:— (*b*) Plated ware	10,062	U. S. of America	765	14,060	U. S. of America Germany	2,160 273	9,317	U. S. of America Germany	732 184	Of the cheaper ware, 50 per cent. from America and Germany.
49	Provisions, not otherwise described:— Meat, preserved	—	—	—	—	—	—	1,751	Germany U. S. of America	78 235	
51	Salt:— (*b*) Rock	—	—	—	—	—	—	1,783	Germany	160	25 per cent. from Germany.
54	Silk Manufactures:— (*a*) Piece goods	—	—	—	15,331	Germany	1,634	12,105	Japan China France	90 54 476	75 to 90 per cent. from France and Switzerland.
	(*b*) Of other kinds	—	—	—	—	—	—	1,886	Japan China Germany	229 74 43	
56	Soap	—	—	—	—	—	—	4,415	U. S. of America	460	
57	Spirits:— (*a*) Brandy	—	—	—	—	—		34,434	Germany France	788 967	Nearly all from France.
	(*b*) Geneva	16,906	Java China	1,115 70	10,779	Germany	6,104	8,447	Germany Holland Java	686 150 515	All from Holland.
	(*c*) Perfumed	—	—	—	5,933	Germany U. S. of America	290 56	4,157	Germany France U. S. of America	122 314 151	60 to 75 per cent from France, America, and Germany.
	(*d*) All other	10,943	China U. S. of America	30 3,121	11,920	Germany U. S. of America	113 3,071	11,204	China Germany U. S. of America	94 198 3,315	
58	Stationery:— Other than paper	—	—	—	—	—	—	32,765	Germany U. S. of America	432 1,218	
64	Wood and Timber Manufactures:— (*a*) Woodenware	2,386	U. S. of America	377	4,709	U. S. of America	3,105	4,856	U. S. of America	2,997	75 to 90 per cent. from America.

H. M. Customs,
Brisbane, May 21, 1896.

W. H. Irving,
Collector of Customs.

QUEENSLAND.

The SECRETARY FOR AGRICULTURE to the CHIEF SECRETARY, Brisbane.

(Extract.)

Department of Agriculture,
Brisbane, October 12, 1896.

THE inquiries that I have made in connection with the trade of the United Kingdom and the Colonies have not been so satisfactory as could have been desired, and, as regards the imports, do not show such preference for trade with the United Kingdom in certain lines of manufacture as should be the case. The replies received from the Chambers of Commerce have not been so detailed as desired in the despatch of the Secretary of State for the Colonies, but it is hoped that the *précis* given in the annexed schedule relative to the imports, when taken with other information compiled by you, may be of service. It is also to be greatly regretted that the Brisbane Chamber of Commerce have not replied to the inquiries made of that Chamber. It will, I think, be fitting to here give the general remarks made by the Maryborough Chamber of Commerce upon the general preference given in certain lines for articles of foreign manufacture in place of those made in Great Britain.—"The difference in "price, combined with the suitability of the article as well as the quality, is the great "factor in the preference given to the foreign-made article over that of English "manufacture, and until the conservatism of British manufacturers to the old-style "patterns and unattractive appearance in which their goods are placed on the market "is overcome, they cannot, we venture to think, hope to compete with those manufac-"turers in foreign lands who are keeping pace with the march of progress in the 19th "century. In singling out the items we have, and that have a preference over the "British article, we have had regard to all the conditions set forth in the Despatch "of the Secretary of State for the Colonies, such as cost of transport, facility of "communication with the countries, subsidies to shipping, special railway rates, rates "of discount, payment, &c. It is a matter for regret that British manufacturers "are being gradually but surely pressed out of their own markets, but we cannot "help expressing the opinion that the fault is their own, in so far that they have "in no way until recently attempted to meet the requirements of the markets of the "Colonies."

In all "agricultural produce" imported, the whole (excepting from Australasia) may be said to come from the United Kingdom or her dependencies, and no trade is done in this direction with foreign countries, unless it be with wheat on an occasion of shortness of crop, such as was experienced in Australasia last year, when some cargoes of wheat were brought from America.

So far as agriculture is concerned, the imports from foreign countries have been greater hitherto in the direction of agricultural implements, which are to be found on many farms here, and there should be an inquiry by British makers into the reasons why the Americans can so compete with them.

PRÉCIS of REPLIES received from CHAMBERS of COMMERCE in connection with the DESPATCH from the RIGHT HONOURABLE the SECRETARY of STATE for the COLONIES with reference to TRADE between the COLONIES and the UNITED KINGDOM.

IMPORTS.

14. *Cement.*—Rockhampton Chamber of Commerce states: That German cement is pushing the English article hard, owing to its being finer ground and of higher quality, surpassing the English in every test.

18. *Clocks and watches.*—Rockhampton Chamber of Commerce says: Come largely from the United States of America.

24. *Fancy Chinaware.*—Rockhampton Chamber: This comes principally from Germany, some from Japan.

27. *Glass.*—Rockhampton Chamber: Window glass from Belgium; table glass from Belgium and Germany; fancy glass from Germany and Austria. As far as glassware is concerned, Continental firms have almost entirely displaced the English, especially in tumblers, glass jugs, and similar articles.

Maryborough Chamber of Commerce states: That window glass is almost entirely obtained from Belgium, the price being much lower than British prices.

29. *Haberdashery and Millinery.*—Rockhampton Chamber: German stockings and socks are being established, though they have not yet driven out the English article; the quality of the German is inferior, but the price is cheaper.

30. *Hardware.*—Rockhampton Chamber: Nails—German wire nails are used in preference to English, owing to the lower price. Gimlets and small tools made in Germany appear to have superseded the Sheffield article.

31. *Hats, Felt.*—Rockhampton: Almost all felt hats used come from France. The English goods cannot compete with the French. Business is increasing with France in this direction.

32. *Implements and Tools of Industry.*—Maryborough Chamber: Agricultural, principally obtained from America; the price is lower and the quality equal to that of Great Britain. Leather belting.—A decided preference is given to American over English, owing to the superiority of the former.

37. *Machinery.*—Maryborough Chamber: Wood-working. The American wood-working machinery possesses greater advantages over that of English manufacturers, being worked with greater facility and consequently with a saving of time.

40. *Metals.*—Rockhampton Chamber: Steel Wire. German steel wire has nearly displaced English goods owing to its cheaper price and good quality. Barbed wire from America and Germany supersedes English. Carriage bolts and nuts from America.

48. *Plate and Plated Ware.*—Rockhampton Chamber: Plated ware largely from the United States of America; small quantity of low quality from Germany.

Maryborough Chamber: Obtained from America and Germany, the designs being more attractive than British and the price considerably lower, quality being taken into consideration.

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No. 25.

DEPUTY GOVERNOR BOUCAUT to Mr. CHAMBERLAIN.

(Received February 15, 1897)

Government House, Adelaide,
January 8, 1897.

SIR,

REFERRING to your despatch of the 28th November 1895, addressed to the governors of the various Colonies, on the question of trade with the United Kingdom, I have the honour to transmit to you a report, together with appendices, which, by direction of the Honourable the Treasurer, has been prepared by the Collector of Customs of South Australia.

I have to explain that it has been owing to the vast amount of work employed in compiling this report, and to the fact that no pains have been spared to give all the information which can possibly be desired, that your despatch has remained for so long a time unanswered.

I have, &c.,
JAS. D. BOUCAUT,
Deputy Governor.

Enclosure in No. 25.

REPORT.

BRITISH AND FOREIGN GOODS.

The Treasury, Adelaide, January 5, 1897.

I HAVE much pleasure in forwarding to His Excellency the Governor, in response to his request, the following Report, with Appendices, which I have had prepared for the information of the Right Honourable the Secretary of State for the Colonies.

F. W. HOLDER,
Treasurer.

Custom House, Port Adelaide,
December 17, 1896.

SIR,

I HAVE the honour to inform you that, in compliance with your instructions, I have prepared certain returns, herein-after more particularly dealt with, in connection with the despatch of the Right Honourable the Secretary of State for the Colonies on the subject of the displacement of articles of British produce or manufacture by goods imported from foreign countries, and the reason for the preference.

I have consulted a large number of merchants and importers of such manufactures as the returns show were received in this Colony during the years specified in the despatch, viz., 1884, 1889, and 1894, and the result is given herein under separate headings in the manner requested.

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The whole of the imports from foreign countries have not been included in the returns, but only such as in any one of the years named came within the proportion laid down in the despatch, viz., such receipts from foreign countries as amounted to five per cent. of the total imports of each article, or when the value of any article imported from a foreign country was in any one of the years specified not less than 500*l*.

The headings mentioned in the despatch, and especially the alternative suggestions which give greater details and largely increase the number of articles to be shown, do not always correspond with the headings in use in the Colony, where the statistical returns are mainly based on the lines shown in the tariff; the period also, 1884 to 1894, embraces two Tariff Acts, that in force before and that after the Act of 1887. Still, the headings used in the returns now furnished fairly well comply with what was asked for.

It may here be remarked that the value of the articles imported from the United Kingdom, from British Possessions, and from foreign states does not show the real extent of the trade with such countries. The particulars given herein show only the value of the foreign goods imported *direct* from foreign countries, and the figures tabulated cannot therefore be taken as representing the actual volume or true value of foreign goods imported.

The various systems of purchasing adopted by buyers also preclude any attempt at stating the actual percentage of foreign goods used in this province, and to make any such estimate would, at best, be mere guesswork. For instance, goods for leading drapery houses, although undoubtedly of foreign origin, are frequently purchased in London, and on receipt in South Australia are described as British, because London was shown as the port of export.

I have now before me a Customs entry which states that so many packages were imported by a certain vessel and that the place from which they came was London, which is correct, but there is nothing to indicate which (if any) of the goods therein described (according to the different rates of duty, such as apparel, boots, drapery, hosiery, woollen dress piece goods, flannel, and so on) are wholly British or partly British and partly foreign, the latter being most likely.

The system of packing adopted by large firms, especially soft goods houses, in having merchandise sent to their own packing houses in London and there cased for export lends itself to this apparent misrepresentation. The articles appear in British statistics as imports from a foreign country, but on their arrival in South Australia they are described as British goods.

Another example may be cited where, for instance, a German firm has its headquarters, say, in Sydney, which then becomes a distributing centre for Australia. The goods arrive there by the German steamers direct from Germany, and are correctly shown in the New South Wales returns as of foreign manufacture; but when some of the same goods arrive in Port Adelaide they are entered as imports from a British possession. In such cases after the first importation into Australasia the country of origin is officially obliterated.

Again, Switzerland, which may have sent us either alone or in conjunction with other foreign countries 5 per cent. of the total imports of any one article (as a matter of fact she does supply a considerable quantity of watches, cigars, laces, ribbons, silks, &c.), does not appear in the list at all. Swiss embroideries shipped to England and thence here are shown as British, whilst similar shipments forwarded *viâ* Germany would be included with imports from Germany.

French manufactures, which are frequently forwarded to Antwerp for shipment by German steamers, would probably be credited, not to France that produced them, nor to Germany that transported them, but to the country where they were shipped—Belgium.

Similarly articles of American manufacture which find their way by Pacific steamships to the Sydney market and are afterwards purchased by our merchants would on importation here by an intercolonial vessel appear as from New South Wales.

On the other hand, owing to the absence of direct communication with Canada, Canadian goods—mowers and binders, for instance—are forwarded to New York for shipment, and appear in South Australian statistics as American.

Other illustrations are given in the accompanying report, such, for example, as British pig iron and galvanized corrugated iron, shipped in London in a German vessel bound to Hamburg to complete loading. The vessel obtains her last clearance from Hamburg, and consequently the iron, although of British manufacture, would be shown as German. British-made straw hats, even, have been known to be shipped for Adelaide by way of Germany, which seems rather extraordinary, but the explanation is probably to be sought in the freight market. These also would appear as imports from Germany.

The difficulty as to the origin of goods has also been experienced in attempts to ascertain particulars of interchange between the Australasian colonies in articles the produce of those colonies—in negotiations for intercolonial reciprocal agreements, for example. It is, in such circumstances, important that each colony should know how much of the other's produce or manufactures has been received, but reliable information of this kind has never been obtainable either from official or other statistics. The imports shown as from, say, Victoria may, and doubtless would, include articles the produce or manufacture of Tasmania, New Zealand, and to some extent Queensland and New South Wales as well. As regards some goods, however, such as raisins, currants, dates, and figs, there would generally be little doubt as to the true producing country which would be given if the importing ship came from Great Britain, but not so if the vessel arrived from Victoria, for the raisins might have come from the Victorian settlement, Mildura, or from Malaga, or Mediterranean ports through Great Britain.

As to the majority of the articles mentioned in the returns—such as arms and ammunition, beer, candles, drugs and chemicals, clocks and watches, furniture, glassware, cutlery, hardware, hollow ware, tools, iron, &c.—there is no doubt that a considerable portion had its origin in foreign countries although shown in the returns as from Great Britain.

I have enlarged, it is hoped not unnecessarily, on this phase of the question to make the matter perfectly clear, and to show that the stated value of foreign goods imported needs considerable augmentation to arrive at the actual extent to which foreign goods are introduced into South Australia.

It may not be out of place to here suggest that the trade statistics of the Australasian colonies should, as far as possible, be prepared on the same general lines in each colony, both as regards the form of the returns and, as nearly as possible, the articles to be shown therein; that these returns should be approximate, as nearly as may be, to those issued by the Board of Trade, and published in the annual statistical abstract mentioned in paragraph 6 of Mr. Chamberlain's despatch; and that special and concerted efforts be made by Great Britain and her colonies to procure in the Customs entries from which the returns are prepared not only the real country of origin of the goods described, but also the country from which such goods were received. Both are important and both should be given. It is manifestly desirable that we should know, firstly, where the goods are produced; secondly, in what country the purchases are made and the merchandise received and reshipped, whereby some, at least, of the advantages of the trade are thus obtained; and, thirdly, in what ships, British or foreign, such goods are carried. The advantages to be gained by the possession of such information, both to the Imperial Government and the colonies, are so evident that it is needless now to do more than direct attention to the matter in the hope that, if considered advisable, some common action may be taken in the direction indicated.

Returning to the main object of the inquiry—"Why are foreign goods 'preferred'?"—it must be said at the outset that it is not an admitted fact that such goods are preferred. Many merchants say that they would rather do business with British merchants, but for various reasons are often unable to do so.

British merchants, it is feared, are too often content to rest upon past laurels, and to be satisfied with continuing in their manufactures and business old styles and methods—in short, are too conservative. Their foreign competitors, on the other hand, are almost feverish in their desire not only to acquire new outlets, but, when found, to neglect nothing that will assist in obtaining a foothold with their goods and afterwards in maintaining and extending the advantage so gained. Everything possible seems to be done with the distinct object of increasing the exports of their own country.

The Continental systems of education, as applied both to industries and general commercial training, are highly extolled, and are considered to have a marked effect on the trade of Germany and the other countries where such methods have reached so high a state of perfection. Although this subject is not, however, neglected in Great Britain and some of her colonies, its extension would undoubtedly conduce to the best interests of both. It is stated that in Germany a youth who passes a certain standard in a high school has his term of compulsory military service reduced. To pass this examination he must acquire fluency in some language other than his own, and English is the one most frequently chosen. After an apprenticeship in his own country he appears in London, the Mecca of traders, and, partly by reason of his knowledge of languages and previous training, is often preferred as a foreign corresponding clerk or in some other capacity in a mercantile house, where he has opportunities of studying English commercial systems and comparing them with his own. These young men are afterwards sought by German merchants, and sent as representatives to different

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parts of the world. Many of them are at present in Australia, and are apparently here to some purpose.

The object of these foreign representatives is not necessarily or wholly that of selling from samples or goods supplied to them. They do not rest content with this, for if an article of English make is particularly popular in the market, samples of that article are forwarded to their principals, and in a short time goods similar in appearance, though perhaps not so good, but lower in price, are placed before buyers, and as the tendency at the present time is largely in the direction of cheapness, the question of durability is largely put on one side, leaving the price to determine the sale.

British consular reports and other official papers concerning trade are, I am informed, eagerly sought and closely studied by foreign merchants, who, as a rule, do not need the aid of an interpreter, but it is doubtful whether foreign trade reports receive the same attention at the hands of British merchants.

The British manufacturer, as a rule, is represented in the colonies by a traveller, who visits the various centres in turn, but foreign firms frequently have resident representatives who make it their business to push trade, and whilst doing so to carefully note and set about meeting any new requirements. Then again there is a pronounced desire on the part of Continental manufacturers to meet the wishes of their clients, but this is not so marked in the case of the British manufacturer. Instances are quoted where repeated efforts have been made to induce British manufacturers to alter their patterns or styles, but the result has too often been anything but satisfactory, and the foreign competitor who has no such objection reaps the benefit.

Merchants in the Colonies say, "Foreign makers come or send and see what we "want and then supply our needs, but we have to go to or communicate with the "British manufacturer and tell him our requirements, and then too frequently fail to "get what we want," and this, it would seem, is to some extent the case. One often hears that the British manufacturer does not push his trade sufficiently, and seems to think that because the Colonies are a part of the British Empire that therefore the trade will go to him or his country, which is a mistake. Sentiment cannot be, and, as a matter of fact, is not, wholly set aside, but, as already stated, although other things being equal or nearly so, the preference as a rule is to deal with Great Britain, it cannot be expected that that desire will be strained in such a manner as to forego distinct advantages to be gained by dealing with a foreign country, especially when representatives of that country are at hand striving by every means in their power to divert the trade, and, when once obtained, to securely hold it.

It is much better and easier for the British manufacturer, by special effort if need be, to retain the trade that he has than to be compelled, by still greater effort, to endeavour to recover it. Merchants say that there has been considerable indifference on the part of English merchants in regard to the supply of many articles required for the colonial market, although it must be added that latterly signs are observable that this habit is being abandoned.

Price is, of course, a very important factor as regards the preference of markets for the supply of requirements. In some lines, iron wire, for instance, a large quantity of which is used in Australia, English makers were warned of the efforts to introduce foreign goods, and were advised to adjust their prices, but they declined, and British wire is consequently now practically unknown in the market. Other instances of indifference or disinclination to meet competitors as regards price could, it is said, be cited.

The large drapery houses in Adelaide have their own buyers in London, and these gentlemen could, no doubt, furnish valuable information on the subject, especially as a considerable portion of the goods received in this Colony, especially articles of a fashionable nature, are not ordered from the Colony, but are purchased in London and sent out.

As a means of counteracting the success which is undoubtedly attending foreign manufacturers in their efforts to extend their business it is suggested that the importance of the trade is sufficient to justify the appointment by the British Government of a commercial representative, at any rate, in the principal colonies, who might perhaps, for the sake of convenience, be attached to the Customs staff, for the purpose of constantly watching the nature and extent of the trade requirements of the colonies and reporting periodically all matters of interest to British traders.

It is understood that the Foreign Office has recently made additional provision for the representation of British commercial interests abroad, and some such action, but possibly on a modified scale, might be considered advisable as regards the colonies also.

Since the above was first written it has been observed that the Council of the Sheffield Chamber of Commerce recently repeated a statement to the effect that three-quarters of the barbers' cutlery, scissors, &c., are supplied to Australia by Germany (which is probably correct), and it was proposed to obtain samples of light-class goods required by the Colonies, but the difficulty seemed to be that no practical effect could be given to the proposal "inasmuch as there are no Consuls in the Colonies, and therefore no "official representatives of the mother country to communicate with."

It is observed also, from a recent number of "The Board of Trade Journal," that a similar representation has been made in Canada, where it was pointed out that most of the British Colonies have commercial agents residing in England, who were attempting, with success, to develop Colonial export trade, and it would seem that commercial agents representing the Imperial Government might with advantage be appointed to reside in the Colonies and look after the interests of British manufacturers.

There is no doubt that, apart from the direct representatives of foreign manufacturers, almost all the Consuls for foreign countries in the Colonies are business men of standing, whose reports to their respective Governments probably partake largely of the character of trade reports, and thus place their Governments and manufacturers in possession of much valuable information which is not conveyed to the British Government or traders, because there is no official or body whose particular duty it is to do so. If a British Consul or trade representative is needed in a foreign country, it would seem desirable that a similar official should be located in some at least of the more important British possessions.

For the sake of clearness, various points of interest are dealt with separately under headings as follows:—

Freights and Subsidies to Shipping.

Subsidies.

The known subsidies to steamship lines trading to South Australia are as under:—

The Orient Company and the P. and O. Company each receives at present 85,000*l.* per annum for the carriage of mails from Great Britain to the Australasian Colonies, the terminal port in both instances being Sydney. Under these contracts the voyages must be performed within a specified time.

The Messageries Maritimes Line, from Marseilles to New Caledonia, receives from the French Government for their monthly service a subsidy of 120,000*l.* per annum. Two cargo boats are also employed by the Company between Sydney and New Caledonia. The route hitherto has been *viâ* Mahé, Seychelles, &c., but the steamers now call at Colombo, and go to Albany, Port Adelaide, Melbourne, Sydney, and Noumea. It is generally understood that the employment of officers of the French navy is required, but it is said that this is not compulsory. It is, however, believed that the commanders and supernumerary captains, as the second in command are called, are usually naval officers.

The Nord-Deutscher Lloyd Line receives from the German Government, also for a monthly service, a subsidy of 100,000*l.* per annum for the Australian section, without limitation as to duration of the voyage. In this, as in the case of the French line, the amount appears to be given mainly to encourage trade with Australia. The steamers of this line are from 2,000 tons to 4,000 tons register, and a new vessel of about 10,000 tons gross, which is shortly expected to be followed by three others of the same type. They sail from Bremen, and thence to Antwerp, Southampton, Genoa, Colombo, Albany, Adelaide, Melbourne, and Sydney.

The Japanese Government have subsidised a line of Japanese steamships to open up a direct trade with Australia, and some of the vessels have already arrived. The service, which is believed to be assisted to a considerable extent, is at present a monthly one, but it is proposed to make fortnightly trips. As might be anticipated, the effect already has been to cut freights.

The foregoing are the only companies known to receive subsidies; in the case of the two English lines for a fortnightly service, certain work to be performed within a specified period and with heavy penalties for non-performance of contract, and in the case of the German and French lines a monthly service with a larger subsidy and without corresponding disabilities.

A second line of German steamships, the German-Australian Company's, now trade from Germany to Australia. This company, which was established only a few years ago, sends its ships from Hamburg, calling at Antwerp, Falmouth (for explosives), Las Palmas (for coal), Port Elizabeth (landing from 500 tons to 600 tons of dynamite

each trip), Port Adelaide, and on to Melbourne and Sydney, and on the homeward route taking coal from Newcastle to Singapore, and, as a rule, going direct to Hamburg *vid* Colombo, returning to Port Adelaide only during the wool season.

These vessels bring general cargo to South Australia (they come direct to the wharves at Port Adelaide), where they leave from 400 tons to 1,000 tons per trip, exclusive of 10 tons to 20 tons of explosives. One of them arrived just before the Christmas holidays with upwards of 12,000 packages of raisins, currants, and figs from Smyrna and Patras. At Port Adelaide on the outward trip they load for the Continent from 500 tons to 1,000 tons of ore and from 200 tons to 250 tons of bullion per trip.

It is stated that the Belgian Government gave the company a subsidy to induce them to call at Antwerp on the outward voyage, but it is believed that this is now discontinued, and that no subsidy is granted by the German Government.

Several lines of British vessels, both steam and sailing, trade regularly from ports in Great Britain to Port Adelaide, such as the Gulf, Port, Shire, and Lund's lines of steamships, and the Adelaide, Loch, and other lines of sailing vessels, but none of them receive a subsidy.

The P. & O., Orient, German (Nord-Deutscher Lloyd), and French mail and passenger steamers that trade to South Australia do not come into the inner harbour at Port Adelaide: they take in and discharge their cargo and passengers at the Semaphore anchorage. The first of these were the P. & O. Company's mailboats, which have been running here direct since 1874; then followed the Orient line in 1877, the French in 1883, and the German in 1886.

These steamships, during the year ending June 1896, discharged about 16,000 tons and loaded about 30,000 tons of cargo, of which the German vessels landed about 5,000 tons and shipped nearly 10,000 tons. The French steamers landed less than 1,000 tons and took away about 5,000 tons. This would represent an average per ship of nearly 200 tons of cargo inward and 360 tons outward for the German and less than 50 tons inward and about 200 tons outward for the French steamers. The cargo by these two lines, therefore, at present represents a total of about 6,000 tons inward and about 15,000 tons outward per annum, or 20 per cent. in the former and 50 per cent. in the latter of the whole of the goods landed and shipped at the Semaphore anchorage.

Freights.

Freights, except for a special line, such as coke, do not appear to have any effect on the importation of foreign goods, and, as regards coke, the foreign quotations are said to be from 3*s.* to 3*s.* 6*d.* per ton lower than British. The margin between English and foreign freights generally is, however, too small to have any appreciable effect on trade. Occasions have been known when, as in case of the line reported on under the heading of "Galvanized Corrugated Iron," it has suited English merchants to ship from London in German vessels bound to Germany to complete their loading, but these occasions are rare, and each case has its own special history.

The ordinary freights from London appear to be as follows:—

P. & O. line (mail subsidy, 85,000*l.* per annum) to anchorage, 45*s.* to 50*s.* per ton for light goods (lighterage to wharf 5*s.* per ton in addition); for heavy goods the freight is a matter of arrangement.

Orient line (mail subsidy, 85,000*l.* per annum) to anchorage for light goods, up to 50*s.* per ton, and 40*s.* per ton for second class or heavy goods; lighterage to wharf, in addition, 5*s.* per ton.

Nord-Deutscher Lloyd (subsidy 100,000*l.* per annum), from Hamburgh to anchorage, goods of the first class, 45*s.*, of the second class, 35*s.*, and of the third class 30*s.* per ton; dead weight 35*s.*, 30*s.*, or 25*s.* per ton, according to the nature of the goods; for lighterage to the wharf, 4*s.* per ton extra.

The German-Australian line of steamers from Hamburg, to Port Adelaide wharf (probably without subsidy) quote for first-class goods (measurement) 41*s.* 6*d.* per ton, and for second class 34*s.*; freight for dead weight being for first class 20*s.* 3*d.*, and for second-class 22*s.* 9*d.* per ton, and for fencing wire 19*s.* 6*d.* per ton.

The Gulf, Lund, and Shire lines have the same general rates of freight; any alteration either by way of increase or decrease is adopted by all. The ruling rates are, for fine measurement, 40*s.* per ton; rough measurement, 35*s.* per ton; and dead weight, 25*s.* per ton; but an advance on these rates equal to 2*s.* 6*d.* per ton all round is said to have recently come into force.

The French line (subsidy, 120,000 per annum) carries goods from London to Port Adelaide at the ruling cargo steamer rates, but they have not as yet obtained

as much cargo as the other lines. Their system is to load in London into a French cargo steamer and tranship into the Australian mail boat at Marseilles.

From Japan to Adelaide by the ordinary steam communication, that is, with transhipment at Melbourne, the freight is 35*s.* per ton, but the rates are being modified owing to the competition of the new Japanese line of steamers.

Freights by sailing vessels are approximately as follows:—

From London to Adelaide—Dead weight, 15*s.* 6*d.* to 17*s.* 6*d.* per ton; measurement, about 22*s.* 6*d.* per ton.

From Continental ports—Dead weight, 12*s.* 6*d.* to 15*s.* per ton; measurement, 17*s.* 6*d.* to 20*s.*

From America—Measurement from 27*s.* to 30*s.* per ton.

The above are about the nominal rates, but freights have recently advanced. There is, however, not much prospect of the rise continuing for any length of time.

From the foregoing it will be seen that the foreign freights are generally lower than the British.

In the German freight classification cargo of the first class includes, with the Nord-Deutscher Lloyd Co., such goods as arms, fine buttons, cotton and linen dress goods, silks, fine woollen stuffs, feathers, gloves, hats, paintings, umbrellas, liquid glucose, &c.

The second class includes books, boots and shoes, brushes, common buttons, canvas, chemicals, cigars, common dry goods (such as linen goods), jerseys and common woollen stuffs, drugs, india-rubberware, common hardware, leatherware, metalware, condensed milk, oil (in cases and casks), scents, tobacco, tools, &c.

In the third class are accordeons, bags and sacks, beer, candles, chicory, chinaware, colors, corks, corsets, crockery, earthenware, gin, gilt cornices, hollow ware, hops, rough ironware, parts of lamps, liquours, parts of machines up to 1,000 kilos., matches, mineral waters, pianos, paper, staves, straw goods, sewing machines, shovels, soap, sugar (in bags), toys, thornwire, wickerware, window glass, and wine.

There are also with German vessels three descriptions of dead weight, each having a different rate of freight—First: iron in bars and sheets, pig lead, zinc in sheets, &c.; second: asphaltum, cement, horse-shoes, iron girders, iron wire (packed for exportation), nails (in casks and cases); and third: corrogated iron. The classification of freight for the German-Australian line is different, and includes for the first class—arms flowers, brushware, chemicals, cigars, clocks, drugs, dry goods, feathers, hardware, hats, leatherware, liquid glucose, perfumery, shoeware, umbrellas, watches, and wearing apparel; for the second class—basketware, beer (in cases), biscuits, bottles (empty), glassware, hops, lamps, machinery not exceeding 1,016 kilos., pianos, porcelain, musical instruments, safety matches, sewing machines, soap, spirits, sugar, tools, &c.

For dead weight—First class: Barbed wire up to 42in., pig iron, iron in bars and plates, lead, zinc plates; second class: cement, girders up to 30 feet in length, nails, &c.

The above shows that included in the second and third classes are many lines which are largely imported into this Colony from Germany, and the freight, even when the extra cost per ton for lighterage is added, does not amount to as much as the freight on similar goods in English ships direct from London. Attention is directed to the following articles included in the third class at 30*s.* per ton—pianos, starch, candles, corsets, sewing machines, hollow ware, paper, earthenware, &c., all of which are in considerable demand in South Australia; also in the second class at 35*s.* per ton—boots and shoes, brushes, common buttons, cigars, common woollen goods, and common hardware.

There is no doubt that the subsidy granted to German steamers is a direct and powerful incentive to German trade, and although the benefits accruing to the colonial merchant in the saving of freight may not greatly influence him in placing his orders, it is certain that a considerable portion of the carrying trade to British possessions is diverted from English to foreign ships, thus restricting the employment of the former.

The practice of rebating to the consignee the primage on freight, which is said to be usually about 10 per cent., is if anything more common in Germany than in England.

As an illustration of the manner in which German steamship owners exert themselves to secure freight, it may be mentioned that one company is said to be now offering bills of lading for wool to be shipped by a vessel which has not yet reached Australia, and which will probably not sail for at least three weeks. The advantage to the wool-shipper is obvious. Not only is this concession made, but the freight is seriously cut in addition. For instance, a large British steamer is just leaving Port Adelaide

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with freights closing at $\frac{5}{8}d.$ per pound (succeeding rates will probably be $\frac{1}{2}d.$), but the German line is already quoting $\frac{3}{8}d.$

TERMS OF CREDIT.

The general practice appears to be for large houses here to make their payments in London, principally through their London houses, and the terms are about the same for cash payments, whether the goods come from Great Britain or foreign countries. It must be remembered that considerable quantities of the foreign goods forwarded to this Colony are actually purchased in London; consequently the terms would in all probability be the terms in that market.

The discounts for each are in most cases about the same in Great Britain and foreign countries, and as regards general trade, there appears to be no appreciable variation in the length of credit given. The systems generally adopted in the case of goods coming direct from a foreign country is for the exporting merchant to send bills of lading to a bank in Adelaide, where the consignee receives them on arrival of the goods and payment of the amount, including all charges. Some importers prefer this, but to others it is a matter of indifference where the goods are paid for.

Foreign importers sometimes send goods at a certain price to known merchants here on condition that when the articles are sold they will be paid for, but not until then, and any profit above the stipulated price remains with the seller.

Other foreign firms consign their goods for sale "at best," paying commission to the merchant here. This method is largely adopted by Continental makers, who desire to bring their goods prominently before the colonial public. They are not unwilling to run some risk provided they reap the advantage of having their goods known in the market and secure future orders.

Although the methods mentioned are adopted by British as well as foreign exporters, the latter, as might be expected from persons who wish to force an entry to secure a portion of the trade, are prepared to run risks that would not be taken by the former, and which, under different circumstances, would probably not be accepted even by themselves.

The practice among American firms, and some English houses as well, is to draw bills on the colonial merchant; but this is by no means a general rule with British houses.

As regards the length of credit, foreign merchants are often prepared to give more favourable terms than British firms, and this is a part of their pronounced desire to secure a market in these colonies.

Some German firms who have representatives in the colonies do not now remit to Germany, but instead buy wool in the Australian market and ship direct to their own factories in Germany, thus saving exchange and reducing the cost of the manufactured articles. At a recent half-yearly meeting of the South Australian Chamber of Commerce one of the leading merchants said that last year a very large proportion of Australian wool exported did not go to Great Britain, but was shipped to the Continent and elsewhere.

In regard to this matter it may be pointed out that the insurance on this wool is largely effected under open policies with Continental companies, who receive all the benefits and obtain the supervision of loading provided at considerable expense by the insurance companies domiciled here, but without contributing anything towards the cost.

TRADE MARKS ACT.

The administration of Part II. of the South Australian Trade Marks Act, the provisions of which are almost identical with the Merchandise Marks Act of Great Britain, has had a marked effect, in some cases by preventing the importation of foreign goods purporting to be of British or other origin (notably cheap spirits from Germany), and in others by causing articles to be labelled in accordance with the actual place of manufacture, such, for example, as German cigars, previously forwarded with labels suggesting, and in some instances actually stating, Manila or Havana to be the place of manufacture.

Spirits were sent with misleading labels printed in English, or French, to indicate Scotch whiskey or French brandy, and imported at such low prices as to seriously interfere with the trade not only in genuine imported spirits, but also with the colonial manufacturers who, as might be expected from the reputation of South Australia as a wine-producing country, are also gradually but surely building up a trade in spirits also. To these colonial manufacturers especially the enforcement of the Act has undoubtedly been of considerable benefit.

There is some suspicion among importers that German white spirit is exported to Great Britain and there "blended" and placed on the colonial market as spirit of British manufacture, but no substantial evidence on this point has been obtainable.

It has also been stated that other goods—machinery, for instance, particularly roller mills—have been manufactured on the Continent and forwarded to Great Britain to the order of an English firm, whose name has been placed upon the mills prior to export to this Colony, where they appear as goods of English manufacture. It is said that perhaps the minor fittings, such as shafting, pulleys, &c., were made in England, but it is certain that the roller mills themselves were not. The Trade Marks Act may in this way be evaded, for if say A. B., of Sheffield, becomes known as the maker of a certain class of goods, it is only necessary to omit the word "Sheffield" to enable him to send foreign goods made to his order direct from the foreign place of manufacture, and yet pass as the British maker.

This practice was somewhat amusingly illustrated a few years ago, when an agent, representing an English reputed manufacturer, in submitting his exhibit for competition, found himself opposed by the actual foreign manufacturer with an article identically the same; both in fact had been made in the same place on the Continent.

As bearing on this subject, it is stated also that considerable quantities of cotton tweeds are imported into Great Britain from the Continent and there made into clothing, which on receipt here appears as apparel of British manufacture, which it is, but only as regards the labour.

Reference has also been made to evasions of the Act in respect to cutlery. It is said (although it is difficult to produce proof at this end) that hollow-ground razors and other similar goods are sent to Great Britain without distinguishing marks, and there placed in boxes which bear the names of English firms. Although the articles themselves are not marked in a way to misrepresent the actual place of manufacture, the names on the boxes would certainly convey a false impression as to the real origin of the goods.

Another method of false description is occasionally adopted by placing on pianos certain well-known names, or names so nearly alike as to deceive. This, while not interfering with the sale of English pianos—a subject which has been fully dealt with elsewhere herein—is often undoubtedly a deception so far as the buying public are concerned.

Under this heading may be mentioned the subject of copyrights held by British publishers of books, concerning which correspondence has passed between the Customs and the owners of copyright works in England with a view to the better protection of the interests of British authors and publishers. A shipment of pirated editions printed in a foreign country was recently destroyed by the Customs here.

It would certainly be an advantage generally, and would tend to place merchants and others on a more equal footing, if the Imperial Merchandise Marks Act were adopted in all the Australian Colonies, as has been done in South Australia and Victoria.

Advertising, &c.

American merchants and manufacturers appear to be specially enterprising in regard to catalogues and price lists. They go fully into detail, are explicit, and present a good idea of the articles offered. In some instances they put themselves to considerable expense in this method of accomplishing their object. Although catalogues are issued periodically in America it is the practice with some manufacturers to notify, by means of photographs, for instance, anything special which may have been produced between two issues.

Monthly price lists are also issued in America in the form of an "Exporters' and Importers' Journal," which contains a large number of illustrated advertisements. Accompanying each such list is a loose "price current discount sheet," showing buyers exactly what discounts are allowed by each merchant, the advertised articles being numbered to correspond with the discount sheet. A copy, with index, is forwarded herewith. This publication also gives details of goods exported from New York and the port to which they were forwarded. The information is said to be of value to merchants generally, and especially when they run out of certain lines, because, by referring to the publication, they can ascertain which colony has been importing similar goods, and so have an opportunity of temporarily supplying requirements.

American merchants also advertise to a greater extent than British merchants, especially in the form of leaflets, pamphlets, &c. Large quantities of these are placed

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in cases with the goods, and are used as packing to fill up, and then scattered broadcast throughout the Colony. Some firms deal largely in this class of advertising, particularly patent medicine manufacturers.

Foreign merchants are said to be more continuous and persistent in their advertising than British, and in some instances where a local merchant acts as agent special arrangements are made for paying for all local advertising.

The personal visits of representatives of foreign merchants also, particularly those from the Continent, are more frequent than British. As a rule the English traveller represents one large firm and will do business only with wholesale houses or large retailers, but his foreign competitor is not so particular. He waits on all and sundry, and is content with orders, no matter from whom or how small. His endeavour is to make up in the aggregate a respectable total and to pave the way for an extension of business.

The Continental system of advertising by means of samples is very good. Specimens are forwarded by way of illustration. The system applies largely to articles in general use among drapers. The ranges of samples sent to the Colony to order from are also very extensive, are nicely got up, and are considered superior to British.

The American system of cataloguing machinery is superior to either British or Continental, the plates more fully and accurately describing the machines, but of late a good deal of machinery has been manufactured in the Colony, thus, to some extent, displacing both foreign and British manufactures.

Although judicious advertising is good and excessive advertising is to be deprecated because the consumer has to pay for it, the British manufacturer cannot afford to be silent while his foreign rival is proclaiming his wares from the housetop. He certainly does not neglect this, and his goods are generally found to agree with the description, but his catalogues can be improved upon as regards general appearance and additional information, and above all is needed the more systematic pushing of his goods by personal representatives.

PACKING.

Packing may, for the purpose of this report, with advantage be divided into packing for purposes of transit and interior packing, such as boxing, for the preservation of goods after arrival.

As regards outside packages, the American packing is undoubtedly the best, and the abundance of wood and the perfection of labor-saving machinery will probably in some measure account for this. Their system of placing certain goods in packages of unvarying size and containing exactly the same number of articles is much appreciated by colonial purchasers. Although it cannot be said that packing itself is a factor of sufficient importance to determine in which country orders shall be placed, it seems certain that, other things being equal, American goods are sometimes preferred on that account. The subject of packing as it affects particular lines is dealt with hereafter under the headings given in the return.

German merchants have recently adopted a system of packing earthen and china ware in crates, and as goods thus packed cost less for freight, if not also for outside packages than if sent in casks, the cost of these goods is correspondingly lessened.

The casing of packages from the Continent is, as a rule, slighter and cheaper than from Great Britain, but yet performs all that is required, viz., the safe carriage of the contents. It is a question whether English packing is not of too solid and substantial a nature. Zinc-lined cases have remained much the same during the last twenty-five years, nothwithstanding the improved conditions of transport.

American outside packages are, as a rule, smaller and handier than packages from Great Britain, and consequently require less labor in handling. Distributing merchants speak highly of this.

In economy of space American and English packing are about equal, but the foreign system of packing articles in small boxes is an advantage both as regards convenience and economy in space.

The cost of American packing, both inside and outside, is generally included in the cost of the goods. This practice is less common on the Continent and still less so in Great Britain.

As regards boxing and internal packing, there seems to be much greater readiness on the part of American and Continental merchants to pack goods in parcels to suit requirements. English manufacturers frequently decline to make any concession in this direction.

To the neat wooden boxes for American small goods, including clocks and watches, is attributed a good deal of the popularity of these articles. The old trade adage that "Goods well kept are half sold" is here well illustrated. By this system goods are kept almost free from dust, and do not so rapidly lose their freshness of appearance, whereas articles packed in paper, &c., much more readily assume an "old stock" look.

The boxing and fittings for foreign perfumes are generally excellent, and contribute in no small degree to their popularity.

In hosiery the neat way in which goods are packed on the Continent, as described elsewhere, is well spoken of.

Speaking generally, it is said that British manufacturers are too frequently indifferent to small side issues of this kind, which, however, have an indirect but appreciable influence on trade.

Returns of Imports and Shipping (British and Foreign).

Attached hereto are several returns as to imports and shipping from Great Britain, British Possessions, and Foreign States.

The first of these* deals particularly with the articles mentioned herein as having been imported direct from foreign countries, and from this it will be seen that the total value of imports from all sources, British and foreign, of the articles required by the Despatch of the Secretary of State to be included amounted during the three years specified—1884, 1889, and 1894—to 5,900,000*l.*, and that of this sum foreign countries sent us direct goods to the value of 537,600*l.*, or about 9 per cent. of the whole.

This amount includes, in round figures,—

	£
Germany	254,000
United States	160,000
France	57,000
Belgium	45,000

besides nine other countries with sums very much smaller, down to those of no importance whatever.

The principal imports from Germany during the three years were—

	£
Beer and ale	32,000
Coke	27,000
Iron wire	23,000
Musical instruments	21,000
From the United States—	
Agricultural implements	25,000
Tools	23,000
Wood	18,000
Engines of other sorts	16,000
From France—	
Haberdashery and millinery	15,000
Cotton piece goods	11,000
Apparel and slops	9,000
From Belgium—	
Candles	21,000
Iron wire	9,000

The second return gives the same information, but in a different form, showing separately the transactions for each of the three years, and from this it will be seen that the imports in question were as follows :—

——	Total.	Foreign.
	£	£
1884	2,244,000	188,000
1889	1,845,000	138,000
1894	1,813,000	210,000

* Not printed.

That is to say, about 8½ per cent. in the first year, 7½ per cent. in the second, and 12 per cent. in the third.

It has, however, been pointed out elsewhere that, owing to the receipts of foreign goods through British Possessions and other channels, the above figures do not represent the actual total receipts from foreign countries, but it serves as an indication of the amount of foreign trade, and shows that that trade is increasing.

Roughly speaking, and judging from the foregoing, and from a knowledge of the frequency with which foreign-made goods have recently come under observation, it is thought that about 20 per cent. will approximate to the real proportion of foreign-made goods consumed in South Australia.

The third return* gives the tonnage of British ships and foreign ships inwards from Great Britain, British Possessions, and Foreign States each year from 1874 to 1894 inclusive, and the large growth during that period is its principal feature, as the following will show:—

——	1874.	1884.	1894.
	Tons.	Tons.	Tons.
British ships:—			
From Great Britain	60,000	244,000	322,000
„ British Possessions	181,000	505,000	763,000
„ Foreign States	3,000	20,000	67,000
Foreign ships:—			
From Great Britain	3,000	20,000	5,000
„ British Possessions	6,000	59,000	86,000
„ Foreign States	8,000	62,000	132,000

Return No. 4* furnishes similar information for ships outwards each year from 1874 to 1894, from which the following particulars are extracted:—

——	1874.	1884.	1894.
	Tons.	Tons.	Tons.
British ships:—			
To Great Britain	38,000	295,000	288,000
„ British Possessions	201,000	483,000	858,000
„ Foreign States	8,000	5,000	9,000
Foreign ships:—			
To Great Britain	1,000	28,000	36,000
„ British Possessions	11,000	75,000	87,000
„ Foreign States	3,000	39,000	107,000

The fifth return* shows the total tonnage, both inwards and outwards, of British ships and foreign ships during the same period, 1874 to 1894:—

——	Inwards.	Outwards.
	Tons.	Tons.
British ships:—		
1874	243,000	247,000
1884	768,000	783,000
1894	1,152,000	1,155,000
Foreign ships:—		
1874	17,000	16,000
1884	141,000	142,000
1894	224,000	229,000

The increases, therefore, during this period were:—Inwards—British ships, 909,000 tons; foreign ships, 207,000 tons. Outwards—British ships, 908,000 tons; foreign ships, 213,000 tons.

* Not printed.

Return No. 6* gives the value for each year from 1884 to 1894 of the total imports from the United Kingdom, British Possessions, and Foreign States, and three of those years are here given:—

——	1884.	1889.	1894.
	£	£	£
From Great Britain - - -	2,983,000	2,008,000	1,899,000
„ British Possessions - -	2,309,000	4,385,000	3,753,000
„ Foreign States - -	456,000	411,000	573,000

The best year was 1891, when the imports reached nearly 10,000,000*l.* During the 11 years mentioned the total imports from Great Britain amounted to 25,600,000*l.*, from British Possessions 41,700,000*l.*, and from Foreign States 5,600,000*l.*, the latter being about 8 per cent. of the other two combined.

The seventh and last return* shows the value of exports to Great Britain, British Possessions, and Foreign States during each of the years from 1884 to 1894. As in the case of imports, three of the years are here given:—

——	1884.	1889.	1894.
	£	£	£
To Great Britain - - -	4,000,000	3,400,000	2,900,000
„ British Possessions - - -	2,400,000	3,500,000	4,100,000
„ Foreign States - - -	145,000	339,000	291,000

As with imports, the best year was 1891, when the exports reached 10,500,000*l.*

During the 11 years given in the return the total exports were—to Great Britain 38,400,000*l.*, to British Possessions 37,400,000*l.*, and to Foreign States 3,100,000*l.*, the latter being about 4 per cent. of the other two together.

It will be seen that the import and export returns just dealt with show during the 11 years from 1884 to 1894, the period embraced in the Secretary of State's Despatch:—

	£
Total imports - - - -	72,900,000
„ exports - - - -	79,900,000

or an excess of exports over imports amounting to 7,000,000*l.*, and a volume of trade equal to 152,800,000*l.*, of which the receipts direct from and the shipments direct to Foreign States amounted to 8,700,000*l.*, or about 5½ per cent.

Four diagrams* also are attached, showing to the eye and at a glance the value and fluctuation from year to year between 1874 and 1894 of the imports from and exports to Great Britain, British Possessions, and foreign countries; also the British and foreign shipping inwards and outwards during the same period.

These returns were not specially asked for, but they are given in the hope that the information may prove of interest, or at any rate will not be considered superfluous.

Samples.

Samples, as per list* attached, have been obtained when considered necessary, and have been forwarded as requested.

Conclusion.

So far, then, as concerns the bulk of British as compared with foreign trade in this Colony alone there is no cause for alarm, but there is cause for vigilance, for it must not be forgotten that it has been during the past few years only that foreign merchants and shipowners have shown such marked efforts to participate not only in the supply of manufactures required by us, but also in the carriage of those manufactures to our shores, and the removal of our produce to their own or elsewhere in return.

* Not printed.

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If those efforts have in any degree been successful, as they certainly have, it is reasonable to suppose that unless checked the advantage already gained will not only continue, but will become greater.

It should be remembered, too, that their intention needs no declaration; it is self-evident. To be forewarned is to be forearmed, and it remains therefore for the British manufacturer and the British shipowner to meet their rivals in such manner as may to them seem best, but certainly not to ignore them.

THOS. N. STEPHENS,
Collector H.M. Customs.

To the Hon. F. W. Holder, M.P.,
Treasurer of South Australia.

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RETURN.

1. Alkali Silicate.

	1884.	1889.	1894.
	£	£	£
Total value of imports	283	562	821
From foreign countries—			
Germany	—	—	66
Total value of direct foreign imports	—	—	66

South Australian merchants import direct from Great Britain. The small quantity received from Germany in 1894 appears to have been one transaction only. It is said that the importation of foreign alkali has ceased.

3. Apparel and Slops.

	1884.	1889.	1894.
	£	£	£
Total value of imports	230,124	133,907	122,786
From foreign countries—			
Germany	590	319	626
France	7,935	553	344
United States	2	463	788
Total value of direct foreign imports	8,527	1,335	1,758

(*a*) *Men's Clothing.*

(*a*) Price.—Prices are too numerous to quote.

(*b*) Quality and finish.—At the prices at which the goods can be sold the quality is satisfactory.

(*c*) Suitability.—It satisfies requirements.

(*d*) Packing.—In this respect there is equality.

(*e*) Other causes.—The establishment in the Colony of branch houses of German firms accounts for the importation of much clothing direct from Germany. The desire of such firms to extend their connection is most pronounced. Again, English manufacturers do not appear to produce an article of so low a class and at such a low price. The price certainly has a deterrent effect on importations of cheap English clothing, and, to a slight extent, on colonial manufactures as well. The German goods are common in quality and low in price, but effective in pattern. In texture they are almost all cotton, but the "get up" is attractive. It must also be mentioned that a statement is made, upon apparently reliable authority, that a large quantity of the tweed of which this clothing consists is imported into Great Britain and there manufactured into apparel; so that, when forwarded to South Australia, it appears as goods of British manufacture. In all probability even the buttons and buckles used in making up are also the manufacture of Germany.

(*b*) *Mole Clothing.*

	1884.	1889.	1894.
	£	£	£
Total value of imports	23,676	21,175	19,881
From foreign countries—			
Germany	—	3	23
France	401	122	228
Total value of direct foreign imports	401	125	251

The foreign competition is so small that no special mention is needed.

Ammunition, Other Kinds.

	1884.	1889.	1894.
	£	£	£
Total value of imports	8,150	9,342	8,879
From foreign countries—			
United States	248	972	742
Belgium	79	—	25
Germany	3	1,196	155
France	—	—	33
Total value of direct foreign imports	330	2,168	955

The articles under this heading are principally cartridges for rifles, sporting guns, and revolving pistols.

The rifle cartridge is the Winchester, and is imported from America—the place of production of the Winchester repeating or magazine rifle. The cartridges for revolving pistols also come from the same places as the pistols. In sporting cartridges the American article, once extensively sold here, is not now so much in use.

(*a*) Price.—The price of the Winchester and revolving pistols was not a factor in inducing their importation; as a fact, a cartridge to suit the Winchester is not made elsewhere.

No reliance can be placed on the prices quoted for sporting cartridges, the discounts being so variable. For instance, one quotation for No. 12 gauge is 26$ = 5*l.* 8*s.* 4*d.* per 1,000, less 40 per cent., 10 per cent., 10 per cent., 10 per cent., 10 per cent., 10 per cent., 2 per cent., and 2 per cent.

(*b*) Quality and finish.—For bulleted cartridges the foreign quality is excellent, but it is said that for sporting cartridges the English maker is gradually displacing the American by supplying a better article at the same price. The English cartridge is said to be better loaded and with better powder, and does not foul the gun to such an extent as the American. This is affecting importation, for the American is on the decrease and the English on the increase.

(*c*) Suitability.—There is no special or peculiar suitability in any of these lines.

(*d*) Packing.—It is in this direction that the American maker is so far ahead of the British. As an example, the "Club" cartridges are packed in cases of 500 each, which is a handy size for distribution to the retailer. Each case contains twenty neat cardboard boxes with twenty-five cartridges—a convenient size for the sportsman. The English maker puts them up in larger cases, and larger numbers. To this cause is attributed a great deal of the popularity of the American goods, and if the British maker takes the hint he will strengthen his position in this market.

(*e*) Other causes.—None apparent.

6. Beer and Ale.

	1884.	1889.	1894.
	£	£	£
Total value of imports	75,362	60,818	29,429
From foreign countries—			
United States	298	88	—
Norway and Sweden	19	—	—
Germany	13,575	14,428	4,569
Belgium	308	15	115
France	592	209	—
Holland	—	—	237
Total value of direct foreign imports	14,792	14,740	4,921

(*a*) Price.—German lager from 6*s.* per dozen in bond, or for a cut price as low as 5*s.* 6*d.* to 5*s.* 9*d.* per doz.

(*b*) Quality.—The quality of the various lager beers both from Germany and America, is good, but their character is so different from the English ales and beers that the qualities cannot be compared.

(*c*) Suitability.—It is in this particular that the lager beer is prominent. It is suitable to Australia, as the summer heat prevents the general consumption of the heavier ales of English make, and such of the public who do not use the beer produced in the Colony call for something of a lighter nature than English. This demand is met by the lager description of ale.

(*d*) Packing.—About equal in excellence.

(*e*) Other causes.—In this connection it may be stated that the character of the beer brewed in the Colony is a potent factor in the displacement of both English and foreign ales. Its popularity is also increased by the effective way in which it is now being bottled. Again, the price of English is against it, for while the retailer sells both English and foreign at the same price, his profit from the sale of the latter is much larger, as the foreign costs, say, 6*s*. per dozen in bond, whilst the English equivalent is 8*s*. per dozen. This is an additional and important reason for the importation of foreign ales.

9. Books, Printed.

——	1884.	1889.	1894.
	£	£	£
Total value of imports	59,194	39,935	41,470
From foreign countries—			
Germany	677	562	704
France	98	8	10
United States	1,168	400	417
China	2	—	—
Total value of direct foreign imports	1,945	970	1,131

As the above figures will show, nearly all the printed books are imported from Great Britain, where the books are purchased. Considerable quantities, however, are no doubt printed elsewhere.

Brushware.

——	1884.	1889.	1894.
	£	£	£
Total value of imports	13,897	7,825	7,993
From foreign countries—			
United States	725	67	1,059
Germany	162	606	697
France	104	59	66
Belgium	22	33	19
Japan	—	3	—
Total value of direct foreign imports	1,013	768	1,841

Brushes.

Under this heading are included in the South Australian tariff both brooms and brushes. The importation of what are called American brooms is large, but a colonial article is now challenging them. The British manufacturer does not make these goods, and the trade rests between local and American makers.

Brushes, Painters'.

(*a*) Price.—The price of German brushes is much below the English. For example, an English brush costing 12*s*. 6*d*. would be represented by one made in Germany and sold here for 6*s*. 6*d*. or 7*s*., and relatively through all grades. Samples are forwarded.

(*b*) Quality.—The quality of the English brush is much superior to the German; its lasting power is greater, and the tradesman can do better work with it. In fact he prefers not to use any other. The demand for the cheap article comes principally from people who do their own painting, and, provided it *looks* the same, the low price sells the brush.

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(*c*) Suitability.—For use by professional painters the English brush is supreme, the German only supplying a demand for cheap brushes, which demand the British maker will not supply.

(*d*) Packing.—Equal.

(*e*) Other causes.—One cause why the German cheap article is in request here is owing to the disinclination of the English maker of good repute to supply a lower class brush. Were he to do so at a price approaching the German he would probably secure the market. It is said that he has frequently been asked to supply, but declines, the reason given being that his name has always been associated with superior brushes, and he will not send out an unstamped brush, as it would injure the sale of the good article. He refuses the business, and the foreigner meets the demand.

Brooms.

The importation of handled whisked brooms is almost entirely from America, and forms the greater portion of the value of foreign brushware shown in the return. Samples are forwarded.

A similar broom is being produced locally and is gaining a fair proportion of the trade.

(*a*) Price.—American, from size No. 6 at about 7*s.* 9*d.* per dozen, to size No. 9 at 12*s.*

(*b*) Quality and finish.—Excellent.

(*c*) Suitability.—They have no special suitability. There is a demand for them.

(*d*) Packing.—They are well packed in order to minimise the cost of freight, but that has little to do with the importation.

(*e*) Other causes.—The material of which these brooms are made appears to be peculiar to America, and the wood for handles being so close at hand, and in such large quantities, gives the American manufacturer every facility to turn out a useful article at a comparatively low cost. Being in the market before any similar brooms were made locally, they obtained a strong lead. They and the similar broom made in Adelaide are known in the trade as American brooms.

Toilet and Clothes Brushes.

Toilet brushware is imported from France to some extent. The quality is good and the price lower than English.

Clothes brushes from Germany are well finished, and cheaper than those made in England. Some of these brushes are now being imported from Japan, and are lower in price than either English or Continental; their quality is satisfactory. Samples are forwarded.

Brushmaking Material.

	1884.	1889.	1894.
	£	£	£
Total value of imports - - -	—	2,313	3,272
From foreign countries—			
United States - - - -	—	—	60
Germany - - - - -	—	—	429
Total value of direct foreign imports	—	—	489

Brushmaking material was included with "Unenumerated Articles" in 1884.

Under this heading come brooms and brush stocks, bristles, bass, fibres, esparto grass, &c., and the lines are too various to give separate prices; but the reason for the importations of foreign—principally German—goods is that they are cheaper than English.

(*a*) Price.—See above.

(*b*) Quality and finish.—All kinds of brushmaking material are received from Germany, but not from England. Such lines, however, as England does send are better than German. English stocks are much superior in finish.

(*c*) Suitability.—Nothing special.

(*d*) Packing.—Has no effect.

(*e*) Other causes.—The duty on finished brushware is now 25 per cent., and the materials in an unfinished state are duty free. This protection has fostered the growth of broom and brush making in South Australia, and enabled the Blind and Deaf Asylum authorities to organise a large and profitable business.

11. Candles.

——	1884.	1889.	1894.
	£	£	£
Total value of imports	37,441	13,458	11,171
From foreign countries—			
United States	64	—	—
France	1,552	—	—
Belgium	19,070	—	1,942
Germany	4,151	6,483	5,084
Holland	—	—	243
Greece	—	—	60
Total value of direct foreign imports	24,837	6,483	7,329

(*a*) Price.—Belgian, 4*d*. per pound, in bond. Lowest price.

(*b*) Quality.—The imports are nearly all from Germany and Belgium, are of good quality, and are lower in price than English.

(*c*) Suitability.—The German and Belgian being cheaper than English are in favour here, but it cannot be claimed that they are generally more suitable than the locally-made article. Foreign candles had a large hold on the market before the Adelaide articles attained their present excellence, but it is gradually declining. A large quantity of candles is imported and again exported for use in the Broken Hill Mines, New South Wales. For domestic use the locally-made article has a good demand both here and at Broken Hill, but for mining purposes the foreign article is preferred—in fact demanded. The colonial is said to be not so hard. Samples of Belgian candles are forwarded.

(*d*) Packing.—No difference.

(*e*) Other causes.—None.

12. Caoutchouc.

Manufactures of India-rubber Goods.

——	1884.	1889.	1894.
	£	£	£
Total value of imports	3,877	3,291	5,664
From foreign countries—			
United States	146	138	191
Germany	—	166	46
Total value of direct foreign imports	146	304	237

Foreign importations have no effect.

14. Cement.

——	1884.	1889.	1894.
	£	£	£
Total value of imports	12,344	6,616	3,746
From foreign countries—			
Germany	1,831	882	1,871
Belgium	—	—	354
Total value of direct foreign imports	1,831	882	2,225

South Australia.

The increase in the importation of German cement, it is said, was due to the fact that in specifications for the supply of cement required for large Government works a degree of fineness of grinding was stipulated which was repugnant to English makers. They did not produce it, but the German manufacturer did, and the delivery needed was so prompt that the British maker could not alter his works to specially produce and compete except by sending forward by steamer. The cement accepted thereby became largely known in the market, and at the present time maintains its position, partly on this account and partly owing to several large coke contracts having been placed in Germany, which enabled advantage to be taken in the matter of freights, the two lines being eminently suited for carriage in the same vessel—the cement for dead weight, and the coke for filling up. This arrangement is very advantageous to the foreigner, especially as the agent for the most important line of German cement is also the successful tenderer for coke required in connection with the Broken Hill mines.

(*a*) Price.—In bond, Port Adelaide.—English, 8*s*. 6*d*.; German, 7*s*. 9*d*. and 8*s*. to 8*s*. 6*d*., according to brand.

(*b*) Quality.—As already stated, the German cement is finer in grinding than the English, and for some purposes is said to be better. On the other hand, the absence of this fineness is said to have been supported by the London Board of Works, and to render the English cement greater in tensile strength; but this is disputed by the representatives of the foreign article. The better German cement and the English cement appear about equal, and the second quality German not quite so good. A good cement is now produced locally, and is coming into favour. A sample of German cement is forwarded.

(*c*) Suitability.—Neither can perhaps claim any very decided superiority, and the cutting of a price may determine a sale.

(*d*) Packing.—No difference.

(*e*) Other causes.—Holding a Government contract would no doubt give the manufacturer of a certain cement a name and standing in the market which otherwise he would perhaps not possess; and by making the best use of that fact, and being in a position to guarantee a test and quality equal to that stipulated by the Government, would strengthen his position. This, no doubt, furnishes one reason for present position of the foreign article. Then, again, holding a coke contract may enable a reduction of freight to be obtained on heavy lines like cement, pig iron, and wire, and advantage may also be taken by the foreigner of the necessity for dead weight for the German-Australian line of steamers. These vessels discharge alongside the wharf, so that no expense for lightering is incurred. It is impossible to obtain any reliable information as to freights. Some importers say that theirs is fixed at the other end, and others decline to disclose.

16. Chemical Products and Dyestuffs.

(*a*) *Drugs and Chemicals.*

	1884.	1889.	1894.
	£	£	£
Total value of imports	74,303	33,088	45,926
From foreign countries—			
United States	3,471	560	540
Germany	707	745	1,545
France	379	38	94
Belgium	49	—	124
Italy	—	58	238
Total value of direct foreign imports	4,606	1,401	2,541

Medicines.

For convenience it would no doubt be better to sub-divide the above heading into (1) drugs, pure and compound, according to the British or German pharmacopœia, and (2) patent medicines.*

* For this heading, *see* p. 499.

(1) Drugs.

(*a*) Price.—The lines are too numerous for any attempt at comparative prices, but there are certain points which may be brought out which, in a measure, will show why a proportion of the drug trade is done with Germany. (See *b* and *c*.)

(*b* and *c*) Quality, finish, and suitability.—The quality being satisfactory, the question of suitability resolves itself into one of price; and in this connection it must be noted that in the past such articles as alkaloids, drugs, and fine chemicals, which especially require quantities of alcohol in their preparation, have been obtained from Germany because, it is said, the laws of that Empire permit the use of pure spirit for the manufacture of drugs in bond, while the excise laws of Great Britain did not, the only concession being the methylation of spirits for use in making drugs. This in most cases was fatal. For instance, iodide of potassium cannot be made unless the spirit is pure, and the price of pure spirit with the English excise duty added was prohibitive. Concessions, however, have, it is stated, recently been made in England, and the trade in this class of goods is gradually being recovered. A certain class of German drugs is lower in quality, and much lower in price, than similar British goods, and a demand for the former is thereby created.

(*d*) Packing.—All are equally well packed.

(*e*) Other causes.—Nothing beyond price and a certain demand for cheap drugs.

(*b*) *Dyestuffs.*

——	1884.	1889.	1894.
	£	£	£
Total value of imports	—	1,280	1,581
From foreign countries—			
Germany	—	50	156
Belgium	—	—	43
Total value of direct foreign imports	—	50	199

Dyestuffs were included in the returns with drugs and chemicals until the year 1885. The total value of the importation for that year was 94*l*., none of which was of foreign produce.

18. Clocks and Watches.

——	1884.	1889.	1894.
	£	£	£
Total value of imports	25,326	12,641	11,531
From foreign countries—			
United States	1,356	745	1,790
France	350	368	81
Belgium	28	119	—
Germany	13	309	467
Total value of direct foreign imports	1,747	1,541	2,338

(*a*) *Clocks.*

(*a*) Price.—It is impossible to give prices for the almost innumerable descriptions of clocks, which range from 2*s*. 6*d*. upwards.

(*b*) Quality and finish.—Clocks may be divided into wood, metal, and marble. American goods are lower in price than English. American wooden clocks have almost a monopoly of the market, being made in a greater number of designs than British, handsome in appearance, good timepieces, and obtainable at a moderate cost. The wood required being plentiful, may, in some measure, account for the low price, but the margin in favour of the American wooden clock is at least 20 per cent. It is an equal timekeeper, and is beyond comparison as regards appearance. Metal clocks are largely imported from America and Germany, and are supplied at low cost. For some

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(c) *Women's Clothing.*

No report under this heading can be furnished upon the lines indicated, as the foreign importations, though large, are mostly indirect, being made through London, in which market the goods are bought. German mantles and cloth jackets form the principal part of the importations, but cotton aprons made up are also imported from Germany to some extent. The jackets are not preferred on account of price, for as a rule they are more expensive, but they are better in cut and fashion, are well-fitting, and can be worn without alteration, while the British article is comparatively shapeless and must be altered before being used.

In mantles the German goods in the cheap and medium classes, which are much in request here, are better value than similar goods from England, and the cut is better, but as regards mantles of high price the English maker is supreme, the style being superior and the goods of a high class. Still, as the demand for such goods is limited, the lower priced and well cut garments prove more remunerative to the seller, and are consequently more zealously pushed. The English maker does not seem to suit the market in the cheap but popular lines.

4. ARMS AND AMMUNITION.

(a) *Firearms, Small.*

	1884.	1889.	1894.
	£	£	£
Total value of imports	8,647	3,155	3,120
From foreign countries—			
United States	778	535	331
Germany	189	352	866
Belgium	219	123	177
Total value of direct foreign imports	1,186	1,010	1,374

Sporting Guns.

(a) Price.—In bond, Adelaide. Belgian single barrels from 15*s.* to 27*s.* 6*d.* each, and double barrels from 30*s.* to 7*l.*

(b) Quality.—There can be no doubt that the English makers of high class guns have the market to themselves, and their quality seems to be beyond anything imported from the Continent. The cheap foreign guns are unreliable, and though browned and "got up" in the form, and apparently in imitation, of the English makes, are decidedly inferior in every way.

(c) Suitability.—This is resolved into a question of price. The English gun of very low price is not so sightly as the foreign article, is not nearly so readily sold, and does not return as much profit to the seller; hence suitability is simply: By the sale of which gun can the merchant make most money? The large importation of cheap low class foreign guns supplies the answer.

(e) Other causes.—There are no causes other than price first and effective appearance second.

Revolvers and Pistols.

(a) Price.—The prices range from 3*s.* 6*d.* up to 60*s.* and higher.

(b) Quality.—Those of the lower price are only a grade or two above the toy pistol, though by accident they might prove dangerous in an equal degree to both the firer and the object fired at. As the prices increase so does the ratio of excellence until the high class American revolving pistol is reached, and then the article is one of surpassing excellence, quite equal for service and accuracy of aim to the excellent revolving pistol made in England.

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years these goods had a strong hold here, but indications are noticeable that a large British company or combination is obtaining a considerable share of the trade. The reasons which formerly obtained for the importation of foreign metal clocks, viz., that they were of better quality and lower in price, do not now hold good, the English clock at present supplied being of good quality and fair in price. No comparison can be made in the line marble timepieces, as the English maker is unknown and the prices at which the French goods are quoted are so low that successful competition would be difficult.

(*c*) Suitability.—This is closely identified with "quality and finish." There is no special suitability, but a purchaser would naturally rather pay, say, 15*s.* for a large handsome wooden clock than, say, 17*s.* 6*d.* for a small plain one, no better as a timekeeper.

(*d*) Packing.—As a rule American packing is considered superior to English. The large American wooden clocks are packed in uniform-sized cases, containing generally six clocks. This to the distributing merchant is a great convenience, saves the cost of repacking when selling to country clients, and enables him to supply fresh in appearance and in good order. Metal clocks are also well packed in thin wooden boxes, stayed inside to keep each clock in position while in transit. The covers of these small boxes are well fitted and are almost dustproof. A sample box is forwarded.

(*e*) Other causes.—There do not appear to be other than price and appearance.

(*b*) *Watches.*

(*a*) Price.—Owing to variety both of metals and goods it is impossible to quote prices.

(*b*) Quality, finish, and (*c*) suitability.—The importation of foreign watches consists chiefly of watches in rolled gold cases from America, gold chronographs from Switzerland, silver watches also from Switzerland, and nickel from Germany and America. The watches in "rolled gold" cases, being produced at a comparatively low price, have a good demand. Their finish is excellent, and to the ordinary observer (not an expert) appear to be solid gold cases. American watches generally display a great variety of design in the engraving on the cases, and in some instances also in the actual shape of the watch itself. Some, for instance, are shaped like a shell or a flower, and all are artistic. The English gold watch, however, is solid gold cased, and of course more expensive, but does not keep better time. It is confined to the one circular shape, and is made in two styles, either engine-turned or plain polished. This applies both to ladies' and gentlemen's watches. An artistic looking rolled gold cased watch, at from 20*s.* to 60*s.* each in America, is, however, often preferred to an intrinsically much more valuable article in a plain but solid casing.

Swiss manufacturers also do a considerable trade in gold watches to the exclusion of the British manufacturer. For instance a gold chronograph made in Switzerland would cost at least 20 per cent. less than a similar watch of equal quality made in England; and in this line it is claimed that the design of the foreign article is superior.

The local demand is largely for cheap watches, and although the excellence of the English lever is admitted, the low price and good time-keeping qualities of the foreign article no doubt do much towards the displacement of the English watch.

Switzerland takes the chief place in the manufacture of silver watches. Take, for instance, a gentleman's keyless watch with a good cylinder movement. This, if made in Switzerland, can be laid down here at 40*s.*, but its English equivalent—an English keyless lever, equal as a timekeeper—would cost 60*s.* It is not denied that the English watch is the better article intrinsically, but it is not a better timepiece, and the foreign cheaper article is preferred. English watches, though admittedly superior in quality, are so expensive that the market is practically closed to them.

In ladies' silver watches the same remarks apply. The demand is for very cheap watches, and as the Swiss makers have gone largely into this branch of the trade they have obtained such a control of the market that it is a rare occurrence for an English watch to be sold. The opinion is generally held that the English manufacturer is indifferent to this class of business, and as the foreigner is not he gets the trade.

Nickel watches.—Large numbers of these cheap machine-made watches are imported from America, and one of well known make has for so long had a monopoly of the market that it would now be difficult to displace it. English makers do not appear to produce anything of a similar class. The original of the watch referred to was clumsy in appearance, and required time and patience to wind, but the article now produced

is much in favour, is made in several sizes, and the stem winding system is reduced to ordinary limits.

A sample of a new line nickel watch, neatly packed in a wooden box, and invoiced in America at 4*s.* 2*d.*, is forwarded.

(*d*) Packing.—There is no difference in packing the better class watches, but for common nickel goods the American watch is much better packed. The box in which each watch is placed is shaped to fit the watch and is lined with some coloured material. These goods when opened and placed in a shop window for show purposes are, consequently, very attractive. A sample box is forwarded.

(*e*) Other causes.—It is evident that foreign watchmakers make the manufacture of cheap watches a speciality, and that English makers do not. The latter, consequently, not only fail to do a trade in such goods but also hinder, or even lose, the sale of their own better class articles. If a cheap watch keeps time a better one is frequently not purchased. It is also asserted that the English manufacturers treat small orders with indifference, and not only fail to seek such business, but neglect to supply goods actually sent for, the answer given to a second or third remainder being "We have no time to attend to small orders." When large parcels are to be placed incidents of this kind are remembered and influence the destination. On the other hand, Continental makers strive to meet the wishes of their clients in every way, and readily sell small parcels, not only for present gain, but for future and increased benefits.

19. Coke.

——	1884.	1889.	1894.
	£	£	£
Total value of imports - - -	2,322	69,614	150,305
From foreign countries—			
Germany - - - -	—	6,574	21,055
Holland - - - -	—	—	15,756
Total value of direct foreign imports	—	6,574	36,811

The coke shown as imported from Holland was made in Germany by the same syndicate that produced the coke imported direct from Germany. It was shipped at Amsterdam, owing to that port being the nearest to the particular coke works from which the supply was drawn.

(*a*) Price.—The price is a fluctuating one, and much of the coke imported is merely for transit by our railways for use at Broken Hill. It is subject to frequent tender, and the prices given must therefore not be taken as actual, though they are approximately correct. German coke, 32*s.* per ton in ship's slings, Port Adelaide wharf; English coke, 38*s.* to 39*s.* per ton in ship's slings, Port Adelaide wharf; New South Wales coke, 24*s.* 6*d.* per ton.

(*b*) Quality.—The quality of the Glamorgan coke, No. 2, and the German standard coke made in Westphalia is said to be about equal, the percentage of ash in the Welsh coke varying from 5 per cent. to 7 per cent., the German about 7 per cent., and the Colonial (New South Wales) as high as 13 per cent.

(*c*) Suitability.—The percentage of ash affects suitability, and the amount in the Colonial article is said to operate prejudicially. In the specification for tenders for the Broken Hill Proprietary Company's requirements, in 1893, it was stipulated that 1*s.* 6*d.* per unit would be deducted for every unit over 7 per cent., while the right was reserved to refuse any coke which showed more than 10 per cent. of moisture or ash. A copy of a specification and call for tenders is forwarded with samples of Westphalian coke now being supplied.

(*d*) Packing.—Unnecessary.

(*e*) Other causes.—Firstly, freight. Following the acceptance of a tender for German cement (alluded to under the heading "Cement"), that commodity being heavy, enabled the successful tenderer to compete for the supply of coke by carrying the cement as dead weight, filling up space with the light article, coke. Again, coke is usually forwarded in foreign ships, which generally, it is said, can be worked at rather less expense than British ships. Freight from Germany is also cheaper than from England.

The largest coke buyers in Australia—the Broken Hill Company—always invite tenders for coke, and of late Westphalian has obtained the contract. It is said,

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however, that if prices are equal, or even if the difference in price is only slight, the Glamorgan coke would get the preference. This No. 2 coke is preferred for smelting purposes, for, although the small amount of sulphur it contains is detrimental for foundry purposes, it is not so for smelting.

Freights are quoted from England, lowest obtainable 16*s.* 6*d.* per ton, and from Hamburg 13*s.*

The Broken Hill Company's average annual importation is 70,000 tons, and tenders are called for 20,000 tons at a time. At present the German makers are supplying, and have also secured the forward tender. As this is a matter of very close tendering the prices are not available, but lower freights and special advantages (although perhaps slight) in favour of foreign ships are said to turn the scale in favour of the foreign supply.

20. CORDAGE.

Steel Wire.

——	1884.	1889.	1894.
	£	£	£
Total value of imports	—	3,663	1,150
From foreign countries—			
United States	—	31	—
Germany	—	157	—
Total value of direct foreign imports	—	188	—

This line was not shown separately in 1884.

23. COTTON MANUFACTURES.

(a) Cotton Piece Goods.

——	1884.	1889.	1894.
	£	£	£
Total value of imports	264,218	188,038	239,033
From foreign countries—			
Germany	1,855	2,580	2,408
France	8,821	861	1,903
United States	—	—	71
Japan	—	—	2
Total value of direct foreign imports	10,676	3,441	4,384

(a) Piece Goods Plain.

Cotton piece goods, such as calicoes, are not yet drawn from foreign sources, but Japan is striving to obtain a footing in the colonial market. Samples submitted from there were said to be fair in quality, considering the price, but the widths were unsuitable. This, however, will probably soon be rectified, and there seems to be colour for statements to the effect that the progress of Japan will be of no benefit to British manufacturers, and that as Bombay has to a large extent superseded Manchester in the spinning trade, so now Japan is endeavouring to supersede Bombay.

Cotton Ticks.

(*a*) Price—The prices vary, but samples are forwarded with prices attached.

(*b*) Quality and finish.—The constructive quality is about equal in both Belgian and English. The question of finish (pattern and style) is dealt with in (*c*).

(*c*) Suitability.—These goods are used chiefly for two purposes, mattress-making and verandah blinds. The English article answers well for the first, and its sale is almost confined to that. The foreign article is in almost sole demand for the latter, principally because the colours are brighter and it is more showy in appearance. In a country like Australia, which at certain seasons has considerable heat, verandah blinds are a necessity, and the more attractive article is chosen.

(*d*) Packing.—Has no effect.

(*e*) Other causes.—Effective appearance and low price furnish the reasons.

Cotton Tweeds.

(*a*) Price.—In Germany, from 7½*d.* to 9*d.* upwards per yard for usual tweed widths, viz., 27 in. Samples are forwarded.

(*b*) Quality and finish.—Both quality and finish are eloquent evidence of excellence and good value at the price. At first glance many of these tweeds might be taken for woollen goods.

(*c*) Suitability.—The great demand is good proof of suitability.

(*d*) Packing.—Has no effect.

(*e*) Other causes.—None.

It is said that large quantities of these articles are sent annually to Great Britain and there made into clothing of English cut and style, and then exported to the Colonies; hence their introduction as English.

Printed Dress Goods.

(*a*) Price.—The price of Continental printed dress goods (cotton) is not lower than English, if so low. Samples with prices are forwarded.

(*b*) Quality and finish.—The printing of the Continental goods is so superior to the English that the market is almost entirely closed to the British maker. This is quite apart from the question of design, &c. The Continental goods are artistically designed and effectively got up, and so impress the buying public. English goods are said to be low in grade and texture, and much wanting in style, in fact more suitable for "trade" purposes with natives than for fashionable business in the Colonies.

(*c*) Suitability.—In this market the Australian climate demands goods of light texture and when the English manufacturer does not study this kind of thing—as in this case—his goods naturally drop out of demand. The Continental maker in many cases makes the fashion and in others keeps well abreast of it, and the result is that his goods are in demand, to the exclusion of English.

(*d*) Packing—Not affected.

(*e*) Other causes.—None. If the British manufacturer is unaware of, or indifferent to, requirements he must not be surprised if his foreign competitor, with perhaps more artistic skill and keener desire to extend his business, secures the trade.

(*b*) *and* (*e*) *Hosiery* (*all Kinds, including Woollen*).

——	1884.	1889.	1894.
	£	£	£
Total value of imports	—	46,491	56,885
From foreign countries—			
United States	—	—	180
Germany	—	630	3,960
France	—	322	384
Holland	—	—	157
Total value of direct foreign imports	—	952	4,681

Hosiery was not shown separately in the year 1884, but with "Drapery and Millinery."

(*b*) *Hose and Half Hose.*

(*a*) Price.—Samples of foreign goods are forwarded, with the prices marked on each.

(*b*) Quality and finish.—In these particulars the foreign articles, considering the price, stand prominently first. A sample of women's black cotton hose, at 2*s.* 6*d.* per dozen in bond, has the appearance of silk. There are no British articles at the price to compare with them in appearance; and this applies also to the other samples submitted. The price being equal, the foreign hose and half hose look better value, and this difference continues through the cotton to the cashmere lines, and so strong is their hold in this market that an extra 10 per cent. duty on foreign hosiery would, it is said, have no effect on the importation.

The finish, as will be seen, is exceedingly good, and in the commoner grades the prices are very low. The cashmere hosiery comes almost exclusively from Saxony.

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(*c*) Suitability.—Included in remarks above.

(*d*) Packing.—External packing has no effect, but the boxing of hosiery is dealt with under section (*e*).

(*e*) Other causes.—The effective way in which foreign hosiery is boxed up, and each pair of hose or half hose marked, contributes to its popularity. For instance, on the side of each article (see samples) is stamped "Made in Germany" [or "Saxony"], "All Wool," "Four Thread," and so on, and this readily catches the eye. The article made in England is usually unboxed and unmarked. In most instances, however, the latter is better in structural strength and lasting quality, but the stamping of the foreign articles seems to be accepted as an indication of excellence, and to induce sale.

Again, English hosiery is invariably done up in the old-fashioned oblong paper parcels, which must be thoroughly opened and the top piece of cardboard removed to show the articles, but in most Continental lines the goods are put up in boxes with a neat paper band around the contents, which looks better, is more convenient, and saves handling.

(*e*) *Under Shirts and Pants.*

In the South Australian tariff these goods are included under the general heading of "Hosiery."

In articles of good and medium qualities the English manufacturers have the trade, but in the lower grade (shoddy mixtures) the Continental (German) manufacturer does a fair proportion of the business. Japan is now making an effort to supply this line, but the samples submitted (cotton undershirts) do not, so far, meet with approval. The price, however, shown on accompanying sample, is very low, and the attempt is an indication of what may be expected at no distant date. Japan must certainly be looked upon as a likely competitor in the near future.

(*a*) Price.—The prices are too various for quotation, but, in common qualities, German goods are cheaper than British.

(*b*) Quality and finish.—For relative qualities in low grades the British are the best, but the prices are much higher. In hose, half hose, and underclothing, which are dyed, German goods are the best, and appear to be better dyed—more lasting. It is mainly in effective appearance for a low price that the German goods excel.

(*c*) Suitability.—None other than that mentioned.

(*d*) Packing.—Dealt with under general remarks upon "Hosiery."

(*e*) Other causes.—None apparent.

(*a.*) *Underclothing, Women's.*

(*a*) Price.—The price is stated on the samples forwarded.

(*b*) Quality.—The sample sent is from the lowest range of these American articles, and as the quality improves the prices increase.

(*c*) Suitability.—There is no special suitability beyond cut, finish, low price, and general suitability for a warm climate.

(*d*) Packing.—American goods are neatly boxed even in the very lowest qualities.

(*e*) Other causes.—None important.

24. EARTHEN AND CHINA WARE.

	1884.	1889.	1894.
	£	£	£
Total value of imports	36,515	21,247	19,228
From foreign countries—			
United States	1	10	7
Germany	562	1,002	936
Belgium	27	—	72
France	—	11	16
Siam	—	—	2
Japan	—	18	—
Total value of direct foreign imports	590	1,041	1,033

Domestic.

In printed cups and saucers the Staffordshire manufacturers do all the trade, but not so in chinaware.

(*a*) Price.—Samples of German china cups and saucers, candlesticks, and jugs, and a few small articles, are forwarded with prices attached.

(*b*) Quality and finish.—In quality English goods are the best, but higher in price. In finish the German goods are more acceptable.

(*c*) Suitability.—The foreign goods are more showy in design, and lower in price. In nearly all cases prices, combined with effective design, is the guide to purchasers. English goods, while good in quality, are plain in appearance. German manufactures have more ornamentation, gold or Dutch metal and colours being largely used. The result is that English goods are being forced out of the market.

It may here be mentioned that the importation of English stoneware (yellow and brown) has almost ceased, but a trade is being done locally, high freight and a duty of 20 per cent. being of material assistance.

(*d*) Packing.—In this particular foreign merchants excel. For instance, cups and saucers from Germany are specially packed with a view to distribution, so many cups (generally a dozen) in one parcel, and an equal number of saucers in another. These are neatly wrapped in paper, which not only prevents breakage, but reduces the cost of repacking by wholesale distributing merchants. English goods, while well packed, are packed loose. Nothing extra is charged in Germany for this kind of packing, but if English firms were required to pack other than as they do, it is said that extra cost would result.

Foreign houses generally are said to supply outside packages free of cost, or cost included with the goods, but British outside packages are charged for and are expensive. Goods from both countries are equally well packed as far as economy of space and immunity from breakage are concerned.

Tiles.

Majolica tiles are being imported from Germany because they are cheap and showy, but, in quality, they are not so good as English. A sample is forwarded, with price attached.

(*a*) Price.—See sample.

(*b*) Quality and finish.—Inferior to English, but, being lower in price, they supply a certain local demand.

(*c*) Suitability.—Merely a question of price.

(*d*) Packing.—Foreign tiles are thinner than English, and, being packed in cases in smaller quantities, are more easily handled. English tiles as a rule are packed in casks, and, as a cask holding the same number of tiles as a case is charged a greater cubic measurement, the advantage in freight is an important item.

A sample of brown flooring tiles made in Italy is also forwarded. The tile is of good surface, but much thinner than similar English goods. The importer declines to disclose his price, but admits having sent large orders for these goods. As far as can be ascertained this is the only line received from Italy, but the success met with will probably lead to further developments in this and similar articles.

25. Fish, Preserved.

——	1884.	1889.	1894.
	£	£	£
Total value of imports	37,866	18,982	18,979
From foreign countries			
Germany	68	640	23
Norway and Sweden	19	—	—
United States	836	446	327
France	—	58	—
Total value of direct foreign imports	923	1,144	350

(*a*) *Herrings.*

All the preserved herrings imported come from Great Britain.

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(*b*) *Other Sorts.*

Lobster and salmon are imported from America and Canada, because the fish are natural to those countries. Those coming from Canada are shown as American, owing to being shipped in New York. These goods form an important item of food in Australia.

Sardines are almost exclusively the produce of Continental countries, and can be landed here from 2*s.* 6*d.* to 3*s.* 6*d.* per dozen, in bond (quarter tins 4 oz. each). The only English fish which at all approaches the foreign sardine is the "Cornish sardine," but these are more of a luxury than a staple of food. They are specially good, but so expensive that the demand is very limited.

Speaking generally, where the particular fish is plentiful, as is the herring in Great Britain and the lobster and salmon in America, the trade in that line goes to that country. Olive oil being cheap and plentiful on the Continent has a distinct bearing on the cheap production of the sardine.

(*a*) Prices.—Lobster, about 8*s.* to 8*s.* 6*d.* per dozen, in bond; salmon, 5*s.* 6*d.* to 6*s.* 6*d.* per dozen, in bond; sardines, 2*s.* 6*d.* to 3*s.* 6*d.* (quarters) per dozen, in bond; oysters, 3*s.* 3*d.* to 3*s.* 6*d.* per dozen, in bond.

(*b*) Quality and finish.—Satisfactory.

(*c*) Suitability.—Very suitable for Colonial requirements.

(*d*) Packing.—All are well and suitably packed.

(*e*) Other causes.—None.

26. FURNITURE.

	1884.	1889.	1894.
	£	£	£
Total value of imports	45,826	26,378	14,681
From foreign countries—			
United States	4,832	2,968	2,177
Germany	1,396	2,429	1,583
France	35	133	9
Belgium	129	—	3
Japan	—	6	71
Italy	—	—	62
China	—	—	7
Total value of direct foreign imports	6,392	5,536	3,912

The foreign furniture imported, except chairs, comes mostly from America; but Austria, and to a smaller extent Italy, divides the chair trade with America. The common kind of bentwood furniture is put together in the Colony. Almost all cabinetware for general use is made locally; that imported is mainly of a high-class artistic nature.

(*a*) Price.—Common Austrian bentwood chairs from 3*s.* each in Adelaide. An illustrated price-list is forwarded, giving full particulars of prices and showing discounts for American furniture of all descriptions.

(*b*) Quality and finish.—The American chairs of the better and best qualities differ much from English goods in design and style. The shapes are novel, and, owing no doubt to the advantage of possessing the woods in abundance, the American furniture manufacturer rarely uses veneer. His goods are of the solid wood, and are supplied in most cases at a lower price than English-made furniture veneered with American wood.

(*c*) Suitability.—The American cabinet work is superior to English in design, and the price is lower; consequently this class of goods has a ready sale—is, in fact, in demand. The Austrian bentwood furniture has for years held a place in the Colonial market, and still does so, the designs being lighter than English or American. The wood used for these Austrian goods is said to be peculiar to Austria. The American chairs are lower in price than Austrian.

(*d*) Packing.—In the lower grades of chairs the American goods are forwarded as they are from Austria, that is with all parts detached, and the various parts suitably packed together to economise space, but the higher class artistic and novel chairs are sent out ready set up. The freight, however, is heavy.

(*c*) Other causes.—In the first place the American system of cataloguing their furniture must be considered. The catalogues are profusely illustrated, and the illustrations present to the intending purchaser an exact description of each article, and give a better general idea of the lines. Unmounted photographs of novelties are promptly forwarded to Colonial clients, and there is a pronounced desire to keep in thorough touch with the Colonial trade. A photograph recently received is forwarded.

Additional causes are the making of goods of solid wood instead of veneer, lower cost, artistic designs for all classes of American furniture, and light appearance even of the larger articles.

27. Glass.

(*a*) *Plate and Sheet.*

	1884.	1889.	1894.
Total value of imports - - -	£ 9,018	£ 5,069	£ 2,652
From foreign countries—			
Germany - - - -	293	203	1,312
Belgium - - - -	114	—	564
Total value of direct foreign imports	407	203	1,876

(*a*) *Plate.*

(*a*) Price.—Both British and Belgian plate glass have the same list price, but the discounts vary. That for Belgian plate was 25 per cent., and for British up to 20 per cent. At the present time the Belgian net prices are as high as British, and in some cases even higher. This is caused by the very large orders for plate glass now being placed with Belgian makers.

(*b*) Quality and finish, and (*c*) suitability.—In appearance the Belgian plate glass is superior, being white and clear, while the British is yellowish and bluish in colour, but in texture the British glass is superior. The Belgian article is found more faulty in cutting, harder, more brittle, with a greater liability to fly off and break when being made up.

In explanation of the difference in colour, it is stated that the proper sand from which to make a clear white plate glass does not exist in England, but does in Belgium; also that the English plate is made of half Belgian sand and half English, while the Belgian plate is made of pure Belgian sand.

Belgian bevelled plate (silvered) is much superior to English, both in finish and silvering. The Belgian is always double coated with silver, but the English is only single coated, and the British article is slightly higher in price than the foreign. This particular line is principally imported for cabinet-makers.

(*d*) Packing.—There appears to be no difference. Both are well packed, and neither can claim superiority in freedom from breakages, which, however, seldom occur.

(*e*) Other causes.—Belgian glassmakers sell for cash only; English manufacturers sell on credit, and, it is said, charge a slightly higher price accordingly. If both were sold for cash the prices would be about the same; but, if anything, the Belgian at present may be the higher.

Belgian manufacturers, in some instances, make no charge for outside packages, and, although this has at times also been done by British manufacturers, the practice is not nearly so frequent.

The importation of British plate glass has now almost ceased, the Belgian being preferred on account of purity of colour.

Freight quotations for plate glass are given as from Antwerp, 30*s*. and 10 per cent., and from England, 37*s*. 6*d*. and 10 per cent.

(*b*) *Flint.*

(*a*) Price.—Samples of Belgian window glass, with prices attached, are forwarded. The discount off Belgian list price for sheet glass is 79 per cent. and off English 65 per cent., a margin of 14 per cent. in favour of the foreign article.

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(*b*) Quality and finish.—The English glass is superior in quality and finish, but the price is so much higher that, except under special circumstances, the market is practically closed to the English maker. Occasionally an architect will stipulate for none but English glass; but, to show how small is the importation, a contractor recently was unable to get sufficient in the Colony, and Belgian was used instead.

(*c*) Suitability.—After the process of rolling, the English glass does not present so wavy an appearance as the Belgian. It is freer from defects, and not so blotchy, but to the ordinary observer both appear the same. As a rule, therefore, it is a question of price, and a margin of 10 per cent. has great weight.

(*d*) Packing.—Both now pack to the satisfaction of importers.

(*e*) Other causes.—None.—If the English maker could sell his glass at the same price as his foreign competitor he would no doubt obtain the trade. At present English sheet window glass is not stocked by importers, and is simply held in small quantities for special cases.

(*c*) *and* (*d*) *Glassware* (*including Bottles*).

	1884.	1889.	1894.
	£	£	£
Total value of imports	13,415	14,418	12,654
From foreign countries—			
United States	206	301	659
Germany	239	1,482	1,966
Belgium	140	40	925
France	—	123	7
Total value of direct foreign imports	585	1,946	3,557

(*c*) *Bottles.*

(*a*) Price.—Perfumery bottles, 4 oz., 6*s*. 3*d*. per gross; flat bottles, with round corners, 4 oz., 5*s*. 8*d*. per gross; 8 oz., 7*s*. 10*d*. per gross; 16 oz., 14*s*. 4*d*. per gross. The prices given are net prices in Germany. The cost of importation is about 40 per cent., and the South Australian duty is 15 per cent. The cost of transportation is about the same from England as from Germany, but the cost of English bottles is largely in excess of German.

(*b*) Quality and finish.—It is said that the English made bottles are of superior quality to those from Germany, the glass being freer from defects.

(*c*) Suitability.—The foreign articles are suitable for requirements, and their comparatively low cost is a strong recommendation. Samples are forwarded.

(*d*) Packing.—Equal.

(*e*) Other causes.—None apparent.

(*d*) *Other Sorts.*

(*a*) Price.—Moulded tumblers, from 11*d*. per dozen in bond; wine glasses, from 2*s*. 6*d*. per dozen; glass jugs, 5*s*. 6*d*. per dozen; butters and sugars, 3*s*. per dozen. Samples of foreign goods, with prices attached, are forwarded.

(*b*) Quality and finish.—English goods in this class are undoubtedly the best, but the prices are too high. In moulded tumblers the difference in favour of the German article is from 25 per cent. to 27½ per cent., and in a common line of this description, where the artistic element is not required, it is purely a matter of price. The bottoms of these glasses are not so well finished as the English, but this is not of sufficient importance to appreciably affect the sale. In glass jugs, butters, and sugars, and fancy glassware of this kind the British maker is again first as regards quality, but in most cases the articles, though substantial, are lacking in design. The German manufacturer makes up by novel designs what he lacks in quality of glass.

(*c*) Suitability.—The glassware for domestic use made in Germany is cheaper, in more varied designs, and has a better general applicability and suitableness for the purpose for which it is intended. One point in respect to the importation of cheap but showy glassware from the Continent must be mentioned, viz., that quantities of these

goods are imported for the sole purpose of placing in auction rooms for sale, their low price ensuring a ready sale and giving the importer a good profit.

(*d*) Packing.—Packing, as regards breakages, is about equal. If anything the English is best, but the Continental is not nearly so expensive.

(*e*) Other causes.—Continental makers appear to be more ready to do business, especially as regards altering designs. The British maker is slow to move, and seems to be indifferent to the wishes of importers.

29. Haberdashery and Millinery.

Drapery and Millinery.

——	1884.	1889.	1894.
	£	£	£
Total value of imports	370,476	277,892	223,005
From foreign countries—			
Germany	1,418	1,737	3,870
France	12,967	2,116	593
Belgium	20	—	459
China	10	1	7
United States	—	25	148
Holland	—	—	196
Switzerland	—	—	3
Total value of direct foreign imports	14,415	3,879	5,276

Linen Table Goods.—Side Table Cloths, D'Oyleys, &c.

German goods of this character have a large sale, the designs and patterns being more popular than similar goods from Belfast. The articles themselves are equal in quality, but the foreign prices are lower.

(*a*) Price.—Some samples, with prices attached, are forwarded.

(*b*) Quality and finish.—In quality there is an equality, but the foreign finish is better.

(*c*) Suitability.—The German goods have a greater variety in design and style.

(*d*) Packing.—No difference of any importance.

(*e*) Other causes.—The foreign manufacturer makes it his particular business to ascertain what will suit Colonial taste, and varies his designs accordingly; while the British manufacturer seems to adhere to old traditions, and consequently the sale of his productions is, to a large extent, restricted.

Laces.—Embroideries.

Complete ranges of flannel and cotton embroideries are forwarded. The prices marked are prices in the London market. The goods are of Swiss manufacture, and complete sets are sent to illustrate the thoroughness with which the foreign maker brings his samples under the notice of purchasers. Apart from the price, attention is drawn to the quality of the goods. Some samples of cotton laces are also forwarded.

Stay Busks.—A sample of German stay busks is enclosed. These goods are largely imported, and are cheap.

Gloves.

The kid gloves, for women's wear especially, appear to all come from the Continent, the English makers seeming to confine themselves mostly to leather gloves. The French kid gloves give satisfaction.

Fabric gloves from Germany—samples of which, with prices attached, are forwarded—are better in quality and finish than similar British goods. These goods have a large sale, and the bulk of fabric gloves imported is of Continental manufacture.

Gossamer.

A card showing samples of single and double gossamers is forwarded. These are of Swiss manufacture, and are in large demand in the season. The prices quoted are in the London market, where they are purchased.

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Ribbons.

Ribbons of English manufacture appear to a very large extent to have vanished from this market, their place being taken by Swiss, French, and German goods, Foreign makers now seem to do the bulk of the trade for so many years enjoyed by the Coventry manufacturers.

(*a*) Price.—Some samples of ribbons are forwarded, but it is not the price that causes the large importation of foreign ribbons (*see* below).

(*b*) Quality and finish.—Foreign goods are of good quality and finish, and lend themselves more readily and are used with more effect in making up in millinery than the English, which, though good in quality, are not in fashionable style. Novelties of design assist the foreign maker to a large extent, and his patterns and designs are more extensively and more frequently produced.

(*c*) Suitability.—The English want of suitability is shown by restricted importations.

(*d*) Packing.—Satisfactory.

(*e*) Other causes.—None apparent.

Buttons.

(*a*) Price.—Cards, with prices given are forwarded.

(*b*) Quality and finish.—The German manufacturers are obtaining a hold in these goods. Attention is directed to the card of bone imitation flexible buttons. The imitation is good, and, for a bone button with a fabric shank, the prices are low. Some linen buttons with metal edges call for attention. In fancy dress buttons the range of patterns is wide and the prices low in comparison.

(*c*) Suitability.—The goods give satisfaction.

(*d*) Packing.—Nothing to call for attention.

(*e*) Other causes.—None.

Corsets.

Almost all corsets imported are shown as of British manufacture, but this is because they are bought in London. The corset most in favour here is of Belgian manufacture, and a sample is submitted. A sample of American corsets is also forwarded. The Belgian corsets have held a strong position for some years, the low price operating in their favour, and it will be difficult to successfully challenge them now.

30. HARDWARE AND CUTLERY.

(*a*) *Cutlery.*

	1884.	1889.	1894.
	£	£	£
Total value of imports	10,461	8,535	10,353
From foreign countries—			
United States	21	14	67
Germany	26	376	730
France	5	1	32
Belgium	151	—	36
Total value of direct foreign imports	203	391	865

This line includes table cutlery, pocket cutlery, and scissors.

Table cutlery is almost exclusively imported from Sheffield. It is freely stated that foreign manufacturers cannot, at low prices, produce the cutting edge required, and it is the low-class pocket cutlery which they supply.

Pocket Cutlery and Scissors.

(*a*) Price.—In bond, Adelaide: Pocket knives, from 2*s.* 3*d.* to 3*s.* 5*d.* per dozen, single blade. Pocket scissors, from 1*s.* 7*d.* a dozen; and scissors from 6*s.* 3*d.* and 6*s.* 9*d.* to 10*s.* per dozen.

(*b*) Quality and finish.—In lower grade pocket knives the quality is poor and the finish very rough. English goods are much superior in style and finish, and are very effective for the purpose for which they were made, viz., to cut.

(*c*) Suitability.—There is, however, a demand in this Colony for cheap knives and scissors, and at a price which so far has not generally been met by the English maker; hence the importation of Solingen cutlery. A leading importer, however, says that the British manufacturer is now taking up this low-class trade, and is regaining a good deal of the lost ground. The price at which Solingen folding pocket scissors, viz., 6*s.* 3*d.* per dozen, can be landed here is their only recommendation. The lowest quotation from Sheffield is 25*s.* per dozen for an article about the same size, but the quality is farther in front of the German than is the price. Merchants, however, do not buy goods to keep in stock and look at, but to sell, and there is a demand for these cheap scissors. It is only occasionally that the better articles are bought.

In high class scissors, though British goods are expensive, so are the German, and the superior quality of the English article enables it to keep the foreign competitor out of the market.

It is also mentioned that the English common knife is being improved in appearance. Heretofore the cheap Continental article has beaten the English, not because it was better in quality, for it was not, but because it was of better appearance.

(*b*) *Hollow-Ware.*

——	1884.	1889.	1894.
	£	£	£
Total value of imports	2,928	4,269	3,877
From foreign countries—			
United States	1	450	223
Germany	—	8	285
Belgium	—	—	31
Total value of direct foreign imports	1	458	539

The only line of hollow-ware which appears to be imported from foreign countries is enamelled ware, including "agateware." The supply of blue and white enamelled ware is drawn principally from Germany, and the agateware from America.

(*a*) Prices.—The leading lines are: tea or coffee pots, from 15*s.* 9*d.* to 23*s.* 10*d.* per dozen, four sizes; kettles, 2*s.* 5*d.* and 2*s.* 9*d.*, two sizes; rice boilers, 1*s.* 9½*d.* to 3*s.* 1*d.*, three sizes. Prices in bond here.

(*b*) Quality and finish.—The American goods are superior to the German in quality and design, and the price from both countries is lower than English. The quality of English-made hollow-ware is admittedly good and well finished, but it is high in price.

(*c*) Suitability.—There is no special suitability for the goods of any country. It is in this as in so many other lines, purely a question of price, and when to this lower price it is added that the foreign articles are more sightly and newer in design, the full reason for foreign importation is given.

(*d*) Packing.—No difference.

(*e*) Other causes.—None apparent.

(*c*) *Nails and Screws.*

——	1884.	1889.	1894.
	£	£	£
Total value of imports	13,530	12,347	8,876
From foreign countries—			
United States	400	205	140
Germany	467	932	1,424
Belgium	246	22	1,841
France	9	—	—
Total value of direct foreign imports	1,122	1,159	3,405

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Although the figures given in the return are for "nails and screws," the foreign importation consists almost exclusively of nails. The trade, according to the return, is done with United States, Germany, and Belgium, but it must be pointed out that considerable quantities of Swedish nails are used in the Colony, and the value of imports from England cannot, therefore, be taken as exact. The Swedish nails are either bought in Great Britain or transhipped there. Italy is now also endeavouring to work up a trade in horseshoe nails. Samples of foreign nails are forwarded.

(*a*) Price.—About 10*s.* 6*d.* per cwt.

(*b*) Quality and finish.—In every way satisfactory.

(*c*) Suitability.—No special suitability.

(*d*) Packing.—All are about equal.

(*e*) Other causes.—None. It is simply price. The nails suit requirements and are lower in price than English goods.

(*d*) *Hardware and Ironmongery not otherwise classified.*

	1884.	1889.	1894.
	£	£	£
Total value of imports	79,932	16,622	22,423
From foreign countries—			
United States	6,594	1,058	1,226
Germany	107	689	130
Belgium	31	—	35
France	32	—	—
Total value of direct foreign imports	6,764	1,747	1,391

The South Australian tariff was altered in 1887, and many lines of hardware and ironmongery which in the previous tariff appeared under this heading are now shown differently—under other headings.

Locks.

Locks and padlocks are largely imported from America. In the lower prices the Americans place an article on the market effective in appearance and use and cheap. The two samples forwarded will illustrate this.

(*a*) Price.—Locks, rim, with brown earthenware handle, 7*s.* 3*d.* per dozen (in Adelaide), with furniture complete. American gaol locks, 2*s.* 10*d.* to 3*s.* 6*d.* per dozen. Locks are free of duty.

(*b*) and (*c*) Quality and finish, and suitability.—At the prices at which these goods can be laid down the quality and finish are excellent, particularly the rim lock with brown earthenware handles. Their appearance makes them better value for the money than a lock of similar price from England. The American gaol lock is a common cast-iron padlock on the Scandinavian principle, and is in good demand for various purpose. These and the other lines are of every-day sale in the Colony.

(*d*) Packing.—Nothing to report.

(*e*) Other causes.—None beyond those stated.

Lawn Mowers.

(*a*) Price.—For American, from 9*s.* to 20*s.*

(*b*) and (*c*). Quality and finish, and suitability.—The American lawn mowers are lighter in draft, less clumsy in appearance, and not so liable to get out of repair. They are also lower in price than English goods, and are produced in more numerous patterns. In practice it has been found much easier to sell the American production. Working gardeners will not use the English mower on account of its weight, and they say that the handy and lighter American mower does just as good work at less exertion to the worker.

(*d*) Packing.—No material effect.

(*e*) Other causes.—None.

Bird Cages.

(*a*) Price.—For American (in bond), Adelaide:—Round brass canary, 2*s.* 6*d.* to 5*s.* 5*d.* each; square brass canary, 2*s.* 2*d.* to 4*s.* 10*d.* each; square japanned, 2*s.* 1*d.* to 3*s.* 1*d.* each; round japanned, 1*s.* 3*d.* to 2*s.* 10*d.* each. Two samples are forwarded.

(*b*) Quality and finish.—The quality is good and the finish excellent, especially in the small appointments for seed and water.

(*c*) Suitability.—Just a matter of price and appearance.

(*d*) Packing.—It is in this particular that economical packing plays an important part in lessening cost of transport. The various parts of the cages are easily taken apart, and as easily put together, so that a buyer ordering a large line will find the cages themselves nested, and the trays packed closely. The small parts are utilised for filling up, and thus a large number of varying sizes of cages are carried in a comparatively small compass.

(*e*) Other causes.—None apparent. It may, however, be mentioned that the American cages have a larger number of designs, and are more novel.

Woven Wire.

(*a*) Price.—For American:—14 by 14, 2 ft. wide, 8½*d.* per yard; 14 by 14, 2½ ft. wide, 10¾*d.* per yard; 14 by 14, 3 ft. wide, 1*s.* 0¾*d.* per yard.

(*b*) Quality and finish.—There is no comparison between the American and the English article. In price the American is cheaper, in quality equal, and in finish much superior. The American article comes to hand well painted in pleasing colours; similar wire from England is unpainted.

(*c*) Suitability.—Owing to the Australian climate and insect life, some protection is demanded, and the American woven wire for exterior blinds, doors, &c., meets requirements. For reasons given the American article is more suitable to this market.

(*d*) Packing.—Has no effect.

(*e*) Other causes.—Cannot specify any.

Small Lines.

These small goods are too numerous to particularise, but in the aggregate represent a considerable trade. It is claimed for the American goods that they show all round good workmanship and adaptability for daily use. Many of them are cheaper than English, and owing partly to their attractive appearance generally are readily sold. They are also better finished than English, but not of better quality. The American, when manufacturing tools, seems to make a special study of the requirements of the workman, and strives to produce an article which will be suitable for the purpose intended, and at the same time accomplish the object desired with satisfaction, and without unnecessary exertion on the part of the user. It is in this respect that American makers are prominent. In small articles handiness and general utility seem to be the predominating features. Specimens of some small goods are forwarded, and their usefulness is apparent. The prices also are low and within the reach of almost every one.

Other.

The only other line of any importance under this heading is "Iron carriage fittings." These are imported from America, and are of both wrought and malleable cast iron. They are imported on account of special patterns made in America and not in England. Although the British maker has not yet entered into the manufacture of these goods, recent inquiries show that he is awake to this particular line.

(*a*) Price.—Catalogue is forwarded.

(*b*) Quality and finish, (*c*) suitability.—The quality is good and the finish excellent, and it is not surprising that as nearly all the wood for the light buggies and waggonettes comes from America the carriage fittings also should be imported from there.

(*d*) Packing.—Good, but has no effect.

(*e*) Other causes.—None apparent.

30. Hats.

(a) *Straw.*

——	1884.	1889.	1894.
	£	£	£
Total value of imports - - - -	—	16,043	17,897
From foreign countries—			
Germany - - - -	—	1,215	—
France - - - -	—	57	214
Total value of direct foreign imports	—	1,272	214

Straw hats were included in "Apparel and slops" in 1884. The value is too small to need special consideration.

It is believed that the hats shown above as German were really English manufactures sent to Germany for shipment, owing to an advantage in freight.

(b) *Men's, Youths', and Boys' Felts.*

——	1884.	1889.	1894.
	£	£	£
Total value of imports - - -	—	17,333	11,924
From foreign countries—			
Germany - - - -	—	165	1,177
France - - - -	—	—	208
Total value of direct foreign imports	—	165	1,385

These hats were included in "Apparel and slops" in 1884.

This is another line in which the value of foreign imports is misleading, for, although wholesale soft goods importers buy largely hats made in Belgium and France, none appear in the return as from Belgium, and only a small proportion from France. The reason is that most of the hats are purchased in London and there packed and forwarded to this Colony, where they appear in the returns as English. A small proportion only of the felt hats imported from Great Britain are actually made there.

(*a*) Price.—The variety is great and the prices too numerous to quote.

(*b*) Quality and finish.—It is essentially the quality and finish, combined with price, that causes the foreign article to be imported. The British manufacturer does not make a hat that can compare with the so-called "French felt" (which is really a "fur" hat), either in quality, price, or appearance.

The bulk of the trade, which at one time belonged almost exclusively to France, has of late been transferred to Belgium, although the old trade name, "French felt," is retained.

(*c*) Suitability.—The Colonial trade demands a large importation of soft felt hats, and as the English hat-makers do not produce an article equal to the foreign goods at the same price, the foreign hat is on that account more "suitable" for the market.

(*d*) Packing.—Has no effect.

(*e*) Other causes.—None apparent.

32. Implements and Tools of Industry.

(a) *Agricultural Implements.*

——	1884.	1889.	1894.
	£	£	£
Total value of imports - - -	46,352	15,551	14,014
From foreign countries—			
United States - - -	17,524	4,226	3,183
Germany - - - -	88	—	18
France - - -	4	—	—
Total value of direct foreign imports	17,916	4,226	3,201

The tariff was altered in September 1887, and many lines which appeared under this heading prior to 1887 have since been shown under separate headings. This will largely account for the apparent decrease since 1884.

(*a*) Price.—American:—Spades, 13*s*. 6*d*. to 40*s*. per dozen; steel shovels, 13*s*. 6*d*. to 40*s*. per dozen; coke forks, 70*s*. per dozen (English, 90*s*.); potato forks, 22*s*. per dozen; ploughs, 10*s*. 6*d*. and upwards each; hay forks and harvest tools, 13*s*. to 22*s*. 6*d*. per dozen. Prices landed here without duty.

(*b*) Quality and finish.—The quality of American goods is not generally superior to English, but they appear to the eye better or more attractively finished. In these goods, however, it is neither price nor quality, but suitability, which causes the demand.

(*c*) Suitability.—The American goods are much lighter than similar articles from England; not cheaper, but constructed in a different shape, and much preferred in the Colony. This refers to all the above except ploughs, and although English makers have endeavoured to produce American patterns, the result has been disappointing. These patterns suit the market, but the English maker does not reproduce exactly, and it is owing to this largely, if not solely, that the British trade is limited. It is freely said that importers would prefer obtaining these goods from Great Britain, but if they cannot sell them they are compelled to import foreign manufactures that will sell. Some samples are forwarded.

One importer says the English article is "heavier and more expensive." The English article, no doubt, is heavier, and even when made of a weight and shape somewhat similar to the American, as is sometimes the case, it assimilates in price but not in design. The largest importer in South Australia tersely put it—"*Imported to meet the demand.*"

As regards harvesting tools especially, it must be remembered that these goods are for use in the extreme heat of summer, when every ounce in weight is of consequence to the worker, who is quick to find out which article will enable him to do an equal, if not an increased, amount of work with the greatest comfort to himself. In this respect the American is said to be pre-eminent. Indeed, it is asserted that English makers do not appear to make harvesting tools.

Although not strictly an agricultural implement, the next item can be classed under that heading, viz., small ploughs for orchards, orangeries, &c., those of the "Planet Junior" type, for instance. This is an implement in large demand, which is claimed to be cheap (from 10*s*. 6*d*. each upwards), light, very strong, and a most satisfactory worker. It does not appear to be made in England. Some of these goods are probably covered by patent, but the English maker does not appear to produce anything that can challenge them. They are largely composed of tough wood, which in America is plentiful and cheap, and this may account for the supply and the low price. A sample and illustrated catalogue are forwarded.

(*d*) Packing.—Nothing appreciable.

(*e*) Other causes.—The pleasing way in which goods are got up, and the indomitable energy of the American houses in bringing their goods prominently before the Colonial purchaser, may be mentioned.

Mowers and Binders.

The imports from America, shown in the return under the heading "(3) Agricultural Implements," include nearly 1,000*l*. worth of mowers and binders; but it must be stated that most of these articles are of Canadian manufacture, sent to America for shipment by sailing vessel (there being no direct communication between Canada and South Australia), and being shipped from an American port are shown as American goods.

(*a*) Price.—In bond, Adelaide:—For mowers and binders, complete, from 29*l*. to 32*l*.; mower and sheaver, 20*l*. 10*s*.; mower only, 10*l*. to 12*l*. 10*s*.; horse rakes, 4*l*. 5*s*. to 6*l*.

(*b*) Quality and finish.—Each importer claims that he represents a machine superior to all others, but if the number sold is any guide the Canadian are superior. As many of one Canadian make are sold here as of all the American makers added together.

(*c*) Suitability.—All are eminently suitable for the work to be performed.

(*d*) Packing.—Has no effect.

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(*e*) Other causes.—None beyond profuse advertising, frequent competitions in field trials held all over the Province, and keen competition among local representatives of foreign makers.

(*b*) *Sewing Machines.*

——	1884.	1889.	1894.
	£	£	£
Total value of imports	17,691	18,149	10,293
From foreign countries—			
United States	1,464	1,514	1,062
Germany	3,054	1,182	4,253
Belgium	1,674	—	—
Total value of direct foreign imports	6,192	2,696	5,315

(*a*) Price in Adelaide, duty free: American treadle, 3*l.* 10*s.*; hand, 1*l.* 15*s.*; German treadle 4*l.*; hand, 2*l.* 5*s.* These prices are for ordinary sewing machines for domestic and tailoring work, light goods. Agents for manufacturing firms have better terms than persons importing for sale on their own account, and no great reliance can be placed on any quotation of prices. It has been pointed out that an American sewing machine can often be sold in Adelaide in the ordinary way of business at a lower price than in the place of manufacture, notwithstanding freight, insurance, &c., in fact all expenses and profit; thereby showing that, aided by protective duties in America and the absence of duty here, the American manufacturer makes his way in this market to the detriment of the English maker, and at the expense of his domestic buyers.

(*b*) Quality and finish.—It is said that the American article is cheaper than English or German, especially in the light and household types, and that the German machines are imitations of American goods. The English machine generally is said to be more complicated in construction and heavier, but excellent in quality. It cannot, however, compare in price with either the American or German. A German make has of late years obtained a large hold on this market, partly perhaps because its sale is strongly pushed, and combined with other lines of German manufacture.

(*c*) Suitability.—All perhaps equally suitable for the work to be done, but the American and German are said to be generally easier running. Price, therefore, is the important item.

(*d*) Packing.—No difference.

(*e*) Other causes.—Profuse advertising, great energy in business, and price have much to do with the large demand for foreign goods. The more florid style of cabinet work also is not without effect.

(*c*) *Tools.*

——	1884.	1889.	1894.
	£	£	£
Total value of imports	41,873	27,034	25,694
From foreign countries—			
United States	10,213	7,382	5,977
Germany	242	366	524
Belgium	177	—	219
France	120	—	60
Total value of direct foreign imports	10,752	7,748	6,780

(*a*) Price.—It is impossible to give complete quotations, as the articles are so numerous. A few leading lines, however, are furnished. In bond, Adelaide: Saws, hand—36 in., 58*s.* per dozen; saws, tenon—12in., 3*s.* 8*d.* each; mill saw files—10in., 6*s.* per dozen, wrenches, agricultural—10in., 8*s.* 6*d.*; 12in., 10*s.* 1*d.* per dozen;

braces—10 in., 10*s.* 10*d.*; 12in., 13*s.* per dozen. Braces, ratchet—23*s.* 7*d.* per dozen. Hammers—0½, 10*s.* 9*d.*; 1½, 12*s.*; 02½, 14*s.* 11*d.* per dozen; tree pruners—6 feet, 24*s.*; 8 feet, 27*s.*, per dozen; plasterers' trowels—No. 1, 2*s.* 6*d.*; No. 2, 3*s.* 1*d.* each.

(*a*) Price.—Quoted above.

(*b*) Quality and finish.—Quite up to all requirements.

(*c*) Suitability.—Nothing special, except that they perform well the work expected of them and are lower in price than similar English articles.

(*d*) Packing.—No effect on price. (See remarks at end of this sub-head.)

(*e*) Other causes. (See end.)

Axes.

(*a*) Price.—American, in bond, Adelaide—30*s.* per dozen upwards. English about the same.

(*b*) Quality and finish.—English and American goods *appear* to be the same in both respects. The quality, however, of the steel is said to be not so good in the English axe; that it lacks chopping powers, and is heavier. The American axes owe much to their superiority in lightness, and being so balanced that the user gets a better result with less exertion. In this line also English makers compete, but do not produce an article equal, both in weight and efficiency.

One importer says that he has tried several English makers of good repute for axes on the American pattern, and they were supplied at a cost about the same. Their appearance was similar, and sales were readily effected, but use proved them deficient in temper, being too hard and brittle, pieces flying out in chopping. A number were returned with large gaps in them, and he was consequently compelled to cease importing from England. Here, then, are two reasons given by different importers—one that the English axe is too heavy and deficient in chopping power, and the other that the English axe on the American pattern is faulty in temper. One can be sold, and gives satisfaction; the other was tried, and was also sold, but was returned with complaints. This mainly accounts for the importation of foreign axes.

Tree Pruners.

In this line the English article is higher in price than the American, has more unnecessary work in it, and is not so acceptable to buyers, who say that it does not give satisfaction, partly because it fails to hold the branch against the cutter. The American pruners are lighter in construction, efficient in every respect, and arrive fitted with handles, long or short, ready for immediate use, whereas the English pruners have to be fitted to a pole. A sample is forwarded.

Hammers.

Preference is shown for the American hammer because it is said that it is handier, the balance is better adjusted, and it has what is known by artisans as "a better fall." The head is fitted to the handle with an adze eye, and the bend of the claw has a quicker curve. It is much preferred by workmen, who, generally speaking, will not look at an English hammer. Carpenters especially object to it. Samples are forwarded.

Plasterers' Trowels.

No particular reason can be given for the preference for the American article. A certain name becomes known, perhaps through advertising, is found suitable, is asked for again, and so obtains a hold on the market. A demand is often created in this way. A sample is forwarded.

Tools Generally.

In tools generally the get-up of the American goods is attractive, they are in some cases lighter to use, cheaper in price, and often more efficient; hence the preference for foreign goods.

(*d*) Packing.—As regards exterior packing, there is not much in favour of any country; but American small goods come to hand in neat cardboard boxes, which are convenient and keep the articles in better condition when unpacked.

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(*e*) Other causes.—Nothing special. The American maker successfully devotes his energies to turning out, at a reasonable price, an article which will perform the duty required of it at the least possible expense of labour on the part of the artisan.

33. INSTRUMENTS AND APPARATUS.

Scientific Instruments.

(Includes Anatomical and Surgical Instruments.)

	1884.	1889.	1894.
	£	£	£
Total value of imports	6,310	4,952	7,152
From foreign countries—			
United States	15	73	90
Germany	207	248	462
France	240	156	229
Belgium	—	—	232
Total value of direct foreign imports	462	477	1,013

Surgical, Anatomical, and Scientific.

Surgical and Anatomical.

(*a*) Price.—These instruments are so numerous and highly technical that it is impossible to quote prices that would be of general value.

(*b*) and (*c*) Quality and finish, and suitability.—The quality and finish of Continental goods are equal to requirements. All surgical and anatomical instruments are cheaper on the Continent, but when it becomes a matter of cutting, Sheffield goods only are in demand; otherwise German goods are preferred on account of price. Illustrated price lists, but as yet no goods, have been received from Japan. All surgical rubber goods also are cheaper in America and Germany than in England.

For surgical knives, scissors, and other first-class cutting goods, price is no object; the best instruments are required, and must be obtained from Sheffield.

(*d*) Packing.—This has no effect on the trade.

(*e*) Other causes.—None of any importance.

Surgical Instruments—Vulcanite Surgical Appliances.

Enemas are quoted in American price lists at from 3*s.* 6*d.* per dozen upwards. A sample of one in white rubber, at 18*s.* per dozen, is forwarded.

(*a*) Price.—These American manufactures are cheaper than similar goods made in England or Germany—at least one-third less.

(*b*) Quality and finish.—The quality of American white rubber is first class.

(*c*) Suitability.—Very suitable.

(*d*) Packing.—Well packed.

(*e*) Other causes.—None apparent.

Scientific.

Scientific instruments of superior class, such as theodolites, meteorological instruments, &c., are all of British manufacture; but there is a lower class, such as aneroids for house use, which are produced cheaper in France.

(*a*) Price.—French aneroids range from 15*s.* to £4, invoice price.

(*b*) and (*c*) Quality and finish, and suitability.—For the price the quality of French articles is good. They are suitable because equally reliable and cheaper than similar British goods. French productions in the lower grades are very presentable and have displaced such of this class of British goods as are made. Price and accuracy form the test of suitability.

(*d*) Packing.—Has no bearing.

(*e*) Other causes.—None of any importance.

34. Leather.

(a) *Unwrought.*

——	1884.	1889.	1894.
	£	£	£
Total value of imports - - -	14,381	15,321	18,635
From foreign countries—			
United States - - - -	1,920	1,764	875
Germany - - -	721	312	694
France - - - -	102	—	340
Belgium - - -	455	40	—
Total value of direct foreign imports	3,198	2,116	1,909

The unwrought leather imported is used in two leading industries, viz., saddlery and harness making and in boot and shoe making, and also for carriage trimmings. That for saddlers' use consists of enamelled leather, 9*d.* per foot; patent dash hides, 5½*d.* per foot; patent winker leather, 10*d.* per foot; patent collar hides, 11*d.* per foot.

(*a*) Price.—Given above; in bond, Adelaide. Samples are forwarded.

(*b*) Quality and finish, and (*c*) suitability.—Patent enamelled leather—The American enamelled leather is better in quality, lower in price, and stands the Colonial climate better than the English article. The price of English leathers is also against them.

Patent Dash Hides.—The above remarks equally apply.

Patent Winker Leather.—In this line the quality of the English leather is superior, but the American is much lower in price, and answers every requirement.

Patent Collar Hides.—The American is only slightly cheaper than English, but is superior in quality, and stands the strain required for this class of leather very much better than English.

(*d*) Packing.—No difference.

(*e*) Other causes.—None. Importers say that if things were equal as regards price and quality the trade would go to England, as communication is so much better. When ordering from America they have to count six months ahead.

Carriage Trimming Leather, Black and Coloured.

(*a*) Price.—10*d.* per foot, in bond, Adelaide.

(*b*) Quality and finish, and (*c*) suitability.—No English leather of this character is known in the market. The American article is well got up, and very good value for money.

(*d*) Packing.—No difference.

(*e*) Other causes.—None.

The English leather for boot uppers cannot compare with the French, German, or American. In fact, it is stated that the English article is almost unknown in this market.

(*a*) Price.—Samples are forwarded, giving the prices for each line.

(*b*) Quality and finish.—The quality of the foreign is much superior, and the finish is claimed to be as near perfection as possible.

(*c*) Suitability.—The foreign goods are of such good quality and appearance that the Colonial buyers refuse English goods. They can do a better business with the leathers of other countries.

(*d*) Packing.—Has no effect.

(*e*) Other causes.—German tanners are most enterprising. For instance, goatskins are purchased and tanned in Madras, but are sent to Germany to be curried, dyed, and made into moroccos, levants, and glacé goat (coloured and black).

Satin calf, Russia calf, calf kid, and leather board come almost exclusively from Germany.

Calfskins are imported from France and Germany; but, since the local tanners have started to make waxed calfskins, they have succeeded in almost replacing the foreign article.

Real glacé goat, glacé lambs, mock kid, and mock lamb are imported exclusively from France.

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The Americans have of late made great advances in manufacturing leathers suitable for ladies' boots; to judge from appearance they will soon appropriate the trade in this line, and so displace both the German and French articles.

English manufacturers are completely displaced in the above goods, and what they do appear to manufacture, viz., glacé persians and coloured roans, are made also by local tanners, who produce an article which is better value than the English.

Leather board, which in some degree takes the place of sole leather, is of German manufacture, and consists of a special treatment of leather shavings, &c., collected from various factories, and subjected to great pressure, thus producing the article in question, which is used largely in a certain cheap class of boots. It is made in varying thicknesses, is much cheaper than sole leather, and is said to be strong and durable. A sample is forwarded.

(b) Leather, Wrought—Boots and Shoes.

——	1884.	1889.	1894.
	£	£	£
Total value of imports - - -	126,360	81,832	66,264
From foreign countries—			
Germany - - - -	669	1,730	1,337
France - - - -	2,196	80	552
Belgium - - - -	253	—	171
United States - - -	77	79	72
Total value of direct foreign imports	3,195	1,889	2,132

The importation of foreign-made boots and shoes appears to be of late slightly on the increase. American goods are largely advertised, well finished, and of attractive and fashionable appearance.

Ladies' boots are imported from France. They are distinctive in character, beautifully finished, superior to the English article, comparatively cheap, and of good value. In weight they are light, and more tastefully got up. The English manufacturer appears to be losing this class of trade—first, by reason of higher price; second, because his goods are not so fashionable; and third, on account of the specially attractive appearance and make of the foreign article.

Since the passing of the Tariff Act of 1887, which considerably increased the duties on boots and shoes, larger quantities have been made in the Colony. This will account for the decrease in the total imports since 1884.

(c) Leather, Wrought—Other Sorts.

——	1884.	1889.	1894.
	£	£	£
Total value of imports - - -	—	3,476	2,038
From foreign countries:—			
United States - - -	—	541	15
Germany - - - -	—	32	10
Total value of direct foreign imports	—	573	25

These goods were not shown separately in 1884, and the values cannot now be given.

The principal items under this heading are fancy bags, purses, &c., which are imported chiefly from Germany and Austria. It is admitted that the designs of the foreign articles are not equal to British, but the low price at which they can be sold is chiefly the cause of their importation. In expensive lines the Viennese goods are equal to English, and are lower in price.

Portmanteaux are now almost all made in the Colony, as also are the majority of the larger description of handbags for business use or for travelling.

Travelling dressing bags (fitted) come almost exclusively from England, but some are locally manufactured.

The low price at which ladies' handbags can be supplied is shown by the two samples forwarded.

Leather Belting.

(*a*) Price.—In bond, Adelaide, from 3*d.* per foot for belting 1 in. wide, upwards.
(*b*) Quality and finish.—This article is imported from America, and, although dearer than English, has twice the lasting power. The difference in quality is due to the American method of tanning and manufacture.
(*c*) Suitability.—Very suitable on account of its durability.
(*d*) Packing.—Of no importance.
(*e*) Other causes.—None.

37. Machinery.

(*a.*) *Steam Engines.*

——	1884.	1889.	1894.
	£	£	£
Total value of imports	17,692	13,062	3,324
From foreign countries:—			
United States	—	—	400
Germany	—	—	186
Total value of direct foreign imports	—	—	586

The falling off in the total is probably owing to the tariff of 1887, which would not take effect until some time after. Previously locomotive engines for the Government were mostly imported from Great Britain, but considerable quantities are now made in the Colony.

The importation of steam engines and boilers, although considerable in 1884 and 1889, was not in 1894 of large dimensions, owing doubtless to the same reason, viz., tariff alterations in 1887. It now consists chiefly of small steam engines suitable for creameries, and the demand was caused by the growth of the dairying industry, and the co-operation of farmers in erecting dairying plant in their own districts.

(*a*) Price.—In engines especially importers say that they are able to lay down foreign goods at prices below English.
(*b*) Quality and finish, and (*c*) suitability. The American makers have, it is claimed, specially studied the requirements of dairying, and have produced light, simple, and comparatively cheap engines which can be worked at small cost.

The inventive faculty, which appears so common in America, seems to keep makers constantly on the alert to produce something which will be an improvement on previous articles and peculiarly suit Colonial requirements in an industry which, as yet, is only in its infancy.

(*d*) Packing.—Has no effect.
(*e*) Other causes.—None.

(*b*) *Of Other Sorts.*

——	1884.	1889.	1894.
	£	£	£
Total value of imports	40,779	64,543	35,727
From foreign countries—			
United States	4,624	5,941	5,380
Germany	690	2,067	488
France	36	914	234
Belgium	18	—	61
Norway	—	—	3
Total value of direct foreign imports	5,368	8,922	6,166

The chief importations under this sub-heading consist of pumps. Brass pumps are imported almost exclusively from England, but in iron pumps (both cistern and force)

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the American manufacturers are serious competitors. English pumps are said to be imitations of American, but they are higher in price, and are not acceptable to buyers. In appearance the English pump is clumsy and cumbersome compared with the American. The lower price, general lightness, and equal power are the chief factors in favour of American pumps.

Under this heading also must be classed machinery for carriage-builders' use. The bulk of the carriages (buggies, &c.) made in South Australia are upon American patterns, and the machinery and appliances for their construction can be obtained at a lower price from that country than elsewhere. No English machinery of this character appears to be known in the market.

In this Colony practically the whole of the milling is done by roller mills, and flour other than roller-milled is not in demand. This roller mill machinery is believed to be imported from England, Austria, Germany, and America, and is free of duty. It is shown in the statistical returns under the heading "Machinery, Free," the value of which for 1895 was 15,566*l.*, including United States 330*l.*, Germany 217*l.*, and Belgium 36*l.* Some of the 11,268*l.* worth credited to England may, however, have been and almost certainly was imported from foreign countries through Great Britain, Victoria, and New South Wales. Neither the total value of roller machinery imported, nor the quantity received from foreign countries, can consequently be given. It is, however, doubtless considerable, seeing that there are upwards of 80 flour mills in the Colony, the plant ranging from 50 pairs of rollers for the largest, down to one pair for the smallest. After providing about 30,000 tons for home consumption, flour is annually exported to the extent of about 60,000 tons, valued at upwards of 550,000*l.*

German rolls cost, landed in South Australia, say, for a double mill 32 by 10, 158*l.*, but the price, of course, varies according to size.

It is stated that certain rollers, ostensibly of British manufacture, and in some cases even with British names on them, were really made in Germany.

Among the imports from foreign countries are the following:—

Roller Mills.

Cost, landed in Adelaide, from 80*l.* each for a 9-in. single roller mill. The price increases according to the size, and whether the mill is single or double. These mills are of American manufacture, are covered by patent, and are much in favour with millers doing a limited business, enabling them to produce a flour of equal fineness to that turned out by larger establishments.

Centrifugal Flour-Dressing Machines.

Cost, landed in Adelaide, from 45*l.* each upwards. These machines are said to be very good. They also are of American manufacture, are claimed to run lighter for flour dressing, and to produce better results (more flour and freer from specks than the English centrifugals). Only one part of the internal works is covered by patent, viz., the beaters.

Flour Purifiers.

Cost, landed in Adelaide, from 40*l.* each and upwards. These again are of American manufacture, and are covered by patent. The opinion is held that the American purifier is better than English, and has fewer complicated parts, which is a great advantage, for if any part of an American machine gets out of order, a miller can rectify the damage without the aid of the expert, who, in most cases, would be necessary in case of damage to an English purifier.

Flour Packers.

Cost, landed in Adelaide, from 25*l.* each and upwards.

Some are imported from America, and are covered by patent. In quality the American machine is said to be equal to that made in England, but the price is given as slightly lower.

The foregoing are the chief parts of machinery imported from foreign countries for roller mills, but a good deal is made locally, such as shafting, pulleys, &c., &c. Two illustrated catalogues of roller mills, giving prices in America, are forwarded, but the

prices quoted are subject to trade discounts, amounting to 15 per cent., or perhaps slightly more.

(c) Boilers, steam.

	1884.	1889.	1894.
	£	£	£
Total value of imports	524	2,428	975
From foreign countries—			
Germany	—	—	101
Total value of direct foreign imports	—	—	101

No satisfactory reason can be given for the increase during 1889.

Practically there is no importation of foreign steam boilers, the transaction shown in the return being probably more as an advertisement than anything else. The duty is 25 per cent., and most of the work is now done in the Colony.

39. Medicine, Patent.

	1884.	1889.	1894.
	£	£	£
Total value of imports	—	—	23,766
From foreign countries—			
United States	—	—	2,000
Germany	—	—	423
Belgium	—	—	4
Egypt	—	—	1
Total value of direct foreign imports	—	—	2,428

Patent medicines were included with "drugs and chemicals" in 1884 and 1889, and the values for those years cannot be estimated.

(*a*) Price.—Being patent goods and the lines so numerous, it is impossible to specify.

(*b*) Quality and finish.—The orthodox medical man says that they are "rubbish," yet they have a large sale.

(*c*) Suitability.—Their special suitability seems to exist in the fact that where medical men are far apart settlers, not perhaps always wisely, use these goods for their varying ailments. The immense system of advertising, apparently without regard to cost, is effective with a certain class of the community to whom a doctor's fee is a serious item. Again, there are certain so-called patent medicines in use in vast numbers of homes for simple complaints, and are said to be more or less efficacious.

(*d*) Packing.—In actual packing the goods themselves are no better packed than medicines from other countries, but advantage is taken to make each case the medium of transmission for a very large amount of advertising matter for all descriptions of patent and proprietary goods.

(*e*) Other causes.—None of any importance.

40. Metals.

(a) Iron; (b) Pig iron.

	1884.	1889.	1894.
	£	£	£
Total value of imports	5,584	25,207	9,207
From foreign countries			
Germany	—	2,672	794
Norway and Sweden	1,799	—	—
Total value of direct foreign imports	1,799	2,672	794

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The Norwegian importation was an unusual one, and it is probable that this was English pig iron carried to Norway and thence here as stiffening for timber vessels.

The large importation in 1889 was no doubt caused by contracts for iron pipes, &c., being then placed in the Colony.

Only a small quantity of pig iron is now imported from foreign countries. The apparent falling off in imports from Germany is accounted for by the fact that when vessels were chartered in England to carry coke from Germany they took English pig iron as ballast, which, on arrival at Port Adelaide would be shown as imported from Germany.

(*c*) *Iron—Bar, Angle, Bolt, and Rod.*

——	1884.	1889.	1894.
	£	£	£
Total value of imports	40,969	27,912	26,735
From foreign countries—			
France	1,535	—	—
Belgium	807	—	—
Germany	—	—	964
Total value of direct foreign imports	2,342	—	964

Only one line can be traced under this heading—iron known in the trade as "German iron," the importation of which does not much exceed 100 tons per annum.

(*a*) Price—About 9*l.* per ton.

(*b*) Quality—Very good.

(*c*) Suitability.—No special suitability known. The market is very limited, and "German iron" is imported by one firm only (a German one), who deal largely with the German population.

(*d*) Packing—None.

(*e*) Other causes—None.

(*e*) *Wire.*

——	1884.	1889.	1894.
	£	£	£
Total value of imports	34,955	38,456	34,742
From foreign countries—			
Germany	18	10,359	12,806
United States	—	1,365	77
Belgium	759	—	8,351
Total value of direct foreign imports	777	11,724	21,234

Wire, Plain.

(*a*) Price.—7 by 9, oval, c.i.f., no commission, 7*l.* 15*s.*, wharf; 8, round, 7*l.* 15*s.*, wharf, 10, round, 8*l.* 5*s.*, wharf; 10, round, 7*l.* 18*s.*, slings. These prices are as nearly correct as possible.

(*b*) Quality and finish.—It is impossible to obtain anything approaching unanimity; but it is generally conceded that in quality the German and English are fairly equal, and that the price of German is below English.

(*c*) Suitability.—No special suitability; it is almost entirely a question of price. Continental brands have almost displaced English wire in this market. English manufacturers, it is stated, were warned of the encroachment of the foreign maker, but did not seem disposed to meet buyers, and consequently have lost the market. The quality and finish of the foreign wire is satisfactory.

(*d*) Packing.—Appears equal; neither country can apparently claim any advantage.

(*e*) Other causes.—Here again the question of the carriage of coke intrudes itself. In such cases deadweight is necessary, and it may easily be understood how wire, as

well as cement and pig iron might be carried at a purely nominal freight. The history of South Australian shipping shows that copper for ballast for wool ships used to be carried in the same way. German steamers loading at Hamburg often require deadweight, and it may be that the ship's necessity is the shipper's opportunity. In an important line like wire, which is in such general demand, the advantages thus gained may in some measure account for the practical monopoly held by the German wire in this market.

Wire, Barbed.

(*a*) Price.—Laid down, Adelaide, barbed wire is quoted at from 12*l.* 15*s.* to 13*l.* per ton for 12-gauge; but prices vary slightly, according to supply and demand and a desire to open up new business.

(*b*) Quality and finish.—In quality and finish all appear equally good, but in an American barbed wire which is being introduced an important innovation is to be noted. *See* sub-head (*e.*).

(*c*) Suitability.—Any barbed wire, satisfactory in price and efficiency, becomes the most suitable for local requirements.

(*d*) Packing.—No difference.

(*e*) Other causes.—Under this sub-head the advantage claimed by the American manufacturer must be mentioned. The English and German barbs are of the same thickness as the wire itself; but to reduce weight and still retain efficiency the American maker splits the wire for the barbs, which thus become only one-half the thickness of the wire. It is claimed that by thus decreasing the weight (the wire is sold by weight) 10 rolls will cover an extent of country that would require twelve of English or German make, and it is sold at about the same price. A sample is forwarded.

(*f*) *Iron, Plate and Sheet.*

——	1884.	1889.	1894.
	£	£	£
Total value of imports	5,120	15,459	5,064
From foreign countries—			
Belgium	400	—	—
France	69	—	—
Germany	—	—	171
Total value of direct foreign imports	469	—	171

The large increase in 1889 was caused by the importation of iron plates for water pipes for the Government.

Foreign importations have no effect on trade.

Iron, Galvanized, Corrugated.

——	1884.	1889.	1894.
	£	£	£
Total value of imports	87,964	25,675	24,794
From foreign countries—			
Germany	—	—	7,009
Total value of direct foreign imports	—	—	7,009

The appearance of German galvanized corrugated iron of the value of 7,000*l.* for the year 1894 is misleading. The iron certainly came from a German port, but it was of a well-known English brand, and was shipped in London in German steamers which went to Hamburg to load for Australia. This may be one of those cases in which a vessel wanting dead weight, unavailable at her German loading port, would offer specially favourable freight terms in order to secure it.

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Imported corrugated galvanized iron pays a duty of 30s. per ton in this Colony, but the plain iron is free. The consequence is that the latter is now imported and corrugated here, and the former is rapidly disappearing from the market. The total imports for 1895 were as follows:—Corrugated, 3,013*l.*; plain, 54,381*l.*

(*h*) *Wheels, Axles, &c.*

	1884.	1889.	1894.
	£	£	£
Total value of imports	7,652	1,278	15,146
From foreign countries—			
United States	100	406	732
Germany	—	—	10,477
Belgium	—	—	1,695
Total value of direct foreign imports	100	406	12,904

Axle-arms and boxes were included with "manufactures of metals" in 1889 and 1894.

The importations from Germany in 1894 were used in the manufacture of locomotives for the Government.

The goods from Belgium were made in Germany by the firm that sent the direct shipments, and were shipped at Antwerp for convenience.

Those from America were tramcar wheels. The tramcars were built in New York, and when the original wheels required renewal the order was placed with the builder of the cars.

(*i*) *Steel, Unwrought.*

	1884.	1889.	1894.
	£	£	£
Total value of imports	5,400	12,121	11,631
From foreign countries—			
Germany	—	276	1,176
Belgium	—	—	323
France	3	—	—
Total value of direct foreign imports	3	276	1,499

This steel is Krupp's.

(*k*) *Manufactures of Metal (principally Iron or Steel).*

	1884.	1889.	1894.
	£	£	£
Total value of imports	25,399	48,855	44,627
From foreign countries—			
United States	1,508	2,514	2,334
Germany	314	676	614
France	17	33	6
Japan	—	2	—
Belgium	—	—	6
Total value of direct foreign imports	1,839	3,225	2,960

The above, in 1884, includes manufactures of metals not otherwise classified.

Under this heading come the lines cast steel shoes and dies for mining batteries.

(*a*) Price.—Price does not cause importation from Germany. Krupp, of Essen, is the maker, but the goods can be as well made in England.

(*b*) Quality and finish.—Satisfactory.
(*c*) Suitability.—Equally suitable.
(*d*) Packing.—None required.
(*e*) Other causes.—Simply a matter of the time that elapses between cabling the order and receiving the goods. Supplies are required lately for fitting up the batteries for the Western Australian fields, and prompt delivery is of importance. Importers know to a certainty the time in which goods can be obtained from Germany, but not so from England. They say that the balance in favour of the foreign supply is generally about 30 days—from Great Britain 90 days and from Germany 60 days.

Rails, Tram.

(*a*) Price.—For light tram rails, from 10 lbs. to 14 lbs., per yard, about 6*l.* 10*s.* per ton in bond, Adelaide.
(*b*) Quality.—Answers all requirements.
(*c*) Suitability.—The American and German rails of this description are suitable, and the price is lower than for similar goods from Great Britain.
(*d*) Packing.—None.
(*e*) Other causes.—None.

Rolled Steel Joists.

(*a*) Price.—German, 6*l.* 5*s.* per ton in bond, Adelaide.
(*b*) Quality.—The quality is not superior to English.
(*c*) Suitability.—These goods are equal to all requirements and cheaper, and on this account only more suitable.

(*f*) *Zinc, Unwrought.*

	1884.	1889.	1894.
	£	£	£
Total value of imports	2,537	4,409	5,544
From foreign countries :—			
United States	—	24	22
Germany	90	236	3,980
Belgium	—	—	230
Total value of direct foreign imports	90	260	4,232

(*a*) Price.—19*l.* 10*s.* per ton in Adelaide.
(*b*) Quality.—Usual; according to standard.
(*c*) Suitability.—Satisfactory.
(*d*) Packing.—Has no effect.
(*e*) Other causes.—Facilities of shipment by German steamers. This is another case where the country of production may be incorrectly stated. This particular article is supposed to be peculiar to Belgium, but it appears as chiefly coming from Germany. It was probably shipped by a German steamer.

41. Musical Instruments.

	1884.	1889.	1894.
	£	£	£
Total value of imports	27,966	16,104	16,933
From foreign countries :—			
United States	3,330	979	1,227
Germany	6,754	5,256	9,214
France	3	219	6
Belgium	186	—	130
Holland	—	—	414
Total value of direct foreign imports	10,273	6,454	10,991

South Australia.

This forms so large an item of importation from foreign countries, and there are such different reasons for importation, that it seems desirable to sub-divide the heading into—(*a*) Pianos, (*b*) Organs, (*c*) Small articles.

Pianos.

(*a*) Price.—The prices given are for instruments generally considered about equal in other respect. From Germany, 22*l*., 39*l*., 50*l*., 65*l*.; English, 30*l*., 50*l*., 60*l*., 80*l*., in bond, Adelaide.

(*b*) Quality and finish.—The English piano is, as a rule, better finished than the German, and it is said to have a better polish; but not so in all cases.

For durability and keeping in tune the German pianos are equal to English for medium and better qualities, and in cheap pianos superior.

As regards price, taking a German and an English piano equal in tone and workmanship, it will be found that the foreign instrument is cheaper, more presentable, and in a larger case. The lasting power of the English may be better, but the average purchaser looks last of all to stability. If the article is cheaper and equal in tone at the time of testing he is largely guided by appearance.

It is generally considered that a German Lipp and an English Brinsmead are about equal in tone and durability, but the price of the former is 39*l*. and the latter 50*l*. In one year a retail merchant sold 40 of a German make as against six of its English rival. He says there was no trouble to sell the former, but the latter were a drug and hung heavily on his hands. These remarks apply generally to the various comparative prices quoted.

Another importer says that the tone of the German very cheap pianos may be a little hard, but the middle class pianos which are so much in demand here are equal in quality and cheaper than the English, and quite up to requirements.

Attempts have been made to induce English manufacturers to produce pianos based on German models, but the result has not been satisfactory. One merchant arranged with an English manufacturer to send him a sample German piano suited to and in demand in this market, and asked for a similar article, not necessarily a slavish copy. The result was landed here at 60*l*., as against 50*l*. for the German original. On further trial an apparently similar instrument was supplied for 55*l*. but on examination it was found to be walnut on top and in front, but with stained sides. No business has since been effected. It is stated, but not very definitely, and without particulars, that the labour employed in the production of pianos is cheaper in Germany than in England.

English pianos are said to be made of better seasoned wood, but are much smaller, in comparison somewhat insignificant. Foreign makers seem to rely on massive and showy appearance, good quality, and lower price, while the English maker sacrifices appearance, relies on excellent workmanship and long life, and keeps up his price. This may answer in England, but not in the Colonies.

The English instrument, it is believed, has a longer life, but that is no advantage to the seller, who can dispose of two or more German pianos for one English, and so make a larger profit, and hope sooner to repeat the transaction. The buying public get no guarantee, and as a rule have no special guide as to lasting qualities.

A second importer, when in England, informed an English maker that he had ordered from Germany six different sets of pianos (two in each set), and asked for a set of two at similar prices, but the result was an absolute failure. In appearance one was massive and handsome, the other plain almost to painfulness; in tone the foreign was good, the other hard and tinny. The German pianos sold readily; the others remained on hand for some time, and then were sold at a loss.

One great complaint as regards the exterior of piano cases from Great Britain is the pronounced reluctance of the British maker to alter his styles. His conservatism is of the most decided nature. One importer says that when in London he tried to induce British makers to produce an instrument described as suited for this market; but, with one exception, they were disinclined to go out of their way. One firm conceded something, but it was so slight as to be of no service, and orders were consequently, and will be, placed on the Continent.

Another says that it was with the greatest difficulty, and only after repeated letters, that he could induce English makers to abandon the old-fashioned "balloon" legs, and to substitute the modern trusses (scroll work) so general in German instruments. The experience on the Continent, however, was very different, and German makers

were glad to supply an instrument in any way required, and spared no efforts to give satisfaction.

English firms do not push their trade like the German. Representatives of no less than three of the principal makers of Germany have quite recently been in Adelaide seeking orders, and they expressed their willingness to make instruments in any form required. They did not say "You must buy what we make," but "If our make is not suitable for your trade, we will alter it."

(*c*) Suitability.—Quality, finish, and price determine suitability.

(*d*) Packing.—The packing of English pianos is generally better than German. The English have solid bolts holding the piano to the case, which it is said is unnecessary and only adds to the cost. Cargo by direct steamers is not so liable to damage as in old times of transhipment or transport by sailing vessel.

(*e*) Other causes.—It is hardly possible that any additional causes could exist, but as regards carriage it may be mentioned that pianos forwarded from Berlin to Hamburg for shipment cost by rail 8*s*. to 10*s*. each, but if shipped, as is usually done, by canal boat, they can be sent for 2*s*. 6*d*. to 3*s*. each, and the highest of these prices is said to be lower than the charge in England for carriage by rail.

Organs, Small.

Such instruments as English cabinet organs are not known in this market, so that American organs can hardly be said to displace British goods, but they have undoubtedly almost wholly destroyed the trade in harmoniums.

(*a*) Price.—These goods can be laid down in bond, Adelaide, at prices from 2*l*. 5*s*. up to almost any price for large instruments.

(*b*) Quality and finish.—For the reason given there can be no comparison. The prices are so much below, and the quality of tone and appearance so much above, the English harmonium, that it is unnecessary to go into the question at length.

(*c*) Suitability.—The goods are popular.

(*d*) Packing.—Good and effective for the purpose.

(*e*) Other causes.—None known.

Fifes.

(*a*) Price.—German, 12*s*. per dozen and upwards; English, 15*s*. per dozen and upwards, in bond, Adelaide.

(*b*) Quality and finish.—This is only a small line in comparison, but a useful lesson can be learned from the two samples forwarded. The German is preferred, not only on account of its price, but because it has a differently fitted key. In the English instrument this key is fitted into a solid rim of wood, and if broken cannot be repaired, while the German article is fitted with a pillar key, which can be replaced.

It is said that German wood instruments generally are not only cheaper and equal in tone, but in many instances superior in appearance.

(*c*) Suitability.—Equal.

(*d*) Packing.—No difference.

(*e*) Other causes.—None apparently,

Accordeons, &c.

(*a*) Price.—German, from 22*s*. per dozen and upwards, in bond, Adelaide.

(*b*) Quality and finish.—It is said that some English are to be obtained, but it is a question of price, the German being at least 20 per cent. cheaper. In the cheaper to medium lines English articles are not known. Better goods, such as concertinas, &c., are superior, but so much higher in price that they do not receive much support.

(*c*) Suitability.—No special suitability.

(*d*) Packing.—No appreciable effect.

(*e*) Other causes.—None.

SOUTH AUSTRALIA.

Brass Instruments.

A catalogue is forwarded from one of the leading importers of brass instruments showing the selling price here; they are all of foreign manufacture, and give every satisfaction. Marginal notes have been placed in the catalogue where necessary.

42. OIL AND FLOOR CLOTH.

	1884.	1889.	1894.
	£	£	£
Total value of imports	8,319	10,633	12,877
From foreign countries—			
Germany	—	—	562
Belgium	—	—	506
France	97	—	—
Total value of direct foreign imports	97	—	1,068

(*a*) Price.—The price for British and Continental goods is about equal.
(*b*) Quality and finish.—About equal.
(*c*) Suitability.—All suitable for this market. Belgian patterns are said to be not produced in England.
(*d*) Packing.—Similar.
(*e*) Other causes.—None.

Sample books, showing textures of both Belgian painted back floorcloths and linoleums, are forwarded. These are now challenging similar British goods. It is claimed on behalf of Belgian manufactures that more artistic taste is displayed in patterns, and that while the English are quite as good, if not superior, in quality, they lose ground on account of deficiency in taste. One large importer says that English makers produce the same patterns year after year, and are too independent to take suggestions from clients. The trade has consequently drifted away to be secured by the Belgians, who keep advancing with the times and design new patterns in great variety.

44. PAINTS AND COLOURS.

	1884.	1889.	1894.
	£	£	£
Total value of imports	15,247	12,173	9,648
From foreign countries—			
United States	704	744	196
Germany	83	328	252
Belgium	100	—	91
Total value of direct foreign imports	887	1,072	539

(*a*) Price.—Landed here in bond:—Venetian red, 11*s.* 7*d.* per cwt.; Indian red, 17*s.* per cwt.; granite red, 33*s.* 7*d.* per cwt.; new yellow, 17*s.* 3*d.* per cwt.; burnt Turkey umber, 19*s.* per cwt.; celestial blue, 23*s.* 1*d.* per cwt.
(*b*) Quality and finish.—The quality of dry colours for paint is judged by the staining power, and importers say that, with the exception of ochre and umber, the German and Belgian dry colours are 50 per cent. stronger, 2 lbs. of foreign being equal to 3 lbs. of English.

It is an interesting fact that orders for this line go to Birmingham and thence to Hamburg, where the goods are shipped. It is said that they can be obtained cheaper in this way than by ordering direct from Hamburg.

(*c*) Suitability.—Even if the goods were equal in all essentials, the price would operate against the English.
(*d*) Packing.—Equal.
(*e*) Other causes.—None.

45. Paper.

(a) *Wrapping.*

	1884.	1889.	1894.
	£	£	£
Total value of imports	5,385	9,656	12,591
From foreign countries—			
Norway and Sweden	67	—	—
Germany	—	892	1,012
United States	—	—	19
Belgium	—	—	123
France	60	—	—
Total value of direct foreign imports	127	892	1,154

Foreign wrapping paper is of a different description to English. It is highly glazed, very presentable in appearance, and in much demand for general counter use; but for rough brown paper, unglazed, English paper makers have a monopoly.

(*a*) Price.—Foreign, from 10*s*. 2*d*. to 12*s*. 6*d*. per cwt. in bond, Adelaide.

(*b*) Quality and finish.—Samples are forwarded.

(*c*) Suitability.—Very suitable for some tradesmen, notably drapers and grocers, and for general light packing.

(*d*) Packing.—All packed in the same way.

(*e*) Other causes.—None apparent.

(b) *Bags.*

	1884.	1889.	1894.
	£	£	£
Total value of imports	4,844	2,515	1,881
From foreign countries—			
United States	—	1,140	627
Norway and Sweden	15	—	—
Total value of direct foreign imports	15	1,140	627

A large proportion of the paper bags used in the Colony are manufactured locally, but those imported from America are of a special make, covered by patent, and called the "Union" bag.

(*a*) Price.—These union bags are made in America in many sizes, and the price ranges from 2*s*. per 1,000 for ¼ lb. bags, to 11*s*. per 1,000 for 12 lb. bags.

(*b*) Quality and (*c*) suitability.—Samples of American bags are forwarded, and from these it will be seen that the paper, although very thin, is strong in texture. These bags are much in demand for grocers' use.

(*d*) Packing.—Has no effect.

(*e*) Other causes.—None.

48. Plate and Platedware.

	1884.	1889.	1894.
	£	£	£
Total value of imports	11,583	12,244	7,679
From foreign countries—			
United States	1,311	1,321	616
Germany	15	391	83
France	173	20	2
Belgium	—	—	7
Total value of direct foreign imports	1,499	1,732	708

The importation of new gold or silver plate is almost unknown; a few small lots of old family plate, in the shape of heirlooms, are sometimes received.

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Importations consist mainly of British electroplate on hard metal and of very good quality, American electroplate on soft metals of excellent finish, and German electroplate where fancy glass is an important item in the design.

(*a*) Price.—In bond, Adelaide. For common quality, American: Revolving cruets, four hole, from 3*s.* 3*d.* to 4*s.*; revolving cruets, five hole, from 4*s.* to 5*s.*; pickles, single, from 3*s.* 3*d.* to 3*s.* 9*d.*; pickles, double, from 8*s.* up; butters from 4*s.* to 6*s.*; napkin rings from 3*s.* 3*d.* to 3*s.* 9*d.*; tea and coffee sets from 23*s.* up. For best single plate—Revolving cruets, four hole, from 7*s.* up; revolving cruets, five hole, from 7*s.* 6*d.* up; pickles, single, from 4*s.*; pickles, double, from 8*s.* For best quadruple plate—Revolving cruets, four hole, 8*s.* 3*d.*, 9*s.* 3*d.*, and 12*s.* 6*d.* up; revolving cruets, five hole, 9*s.* 3*d.*, 10*s.* 6*d.*, and 12*s.* 6*d.* up; pickles, single, 6*s.* 6*d.* up; pickles, double, 10*s.* 6*d.* up; butters from 9*s.* 6*d.*, to 17*s.* 6*d.*; butters, revolving, small, from 15*s.* 9*d.* to 16*s.* 6*d.*; butters, revolving, large, from 18*s.* 6*d.* to 22*s.* 6*d.* Napkin rings, 8*s.* 3*d.*, 10*s.* 6*d.*, to 16*s.* per dozen; napkin rings, fancy, on stands, 2*s.* 6*d.* to 5*s.* each; cake baskets, 12*s.* 6*d.* to 18*s.* 6*d.*; tea and coffee sets, 3*l.* to 5*l.*; waiters and salvers from 8*s.* to any price; children's mugs from 3*s.* to 7*s.* 6*d.*

(*b*) Quality and finish.—The quality of British plate on hard metal is undoubtedly good, but Americans appear to have acquired a knowledge of electroplating on soft metal (at, of course, lower cost), and present an appearance equal to the English on hard metal and much superior to that on soft metal.

The German manufactures are good in quality, and, being lower in price and more effective in appearance, meet a local demand.

The finish of the English article is very good, as is also that of the American, but the designs of the latter are more novel and various. It is the superiority of design in the glass used and the low price of such goods that bring the German manufactures into prominence.

(*c*) Suitability.—The foreign article displaces the British in this market, partly because English manufacturers do not keep pace with the requirements of the times. For instance, in the line tea and coffee services the British are unmistakably good on hard metal, but the shapes are what people have been accustomed to for many years, while the American maker departs from old-fashioned shapes, produces an article of excellent finish (albeit on soft material), of novel design, and one which experience has proved will stand ordinary wear and tear almost as well as the more expensive English article. Whatever the cause—whether superior machinery, better taste, or more expert knowledge—the fact remains that the English maker does not successfully compete with the American in electroplated goods for household use. Where efforts have been made in this direction, it is said that the English substitutes for American goods are also lacking in finish and higher in price.

Under this sub-head may also be mentioned the disapprobation with which British makers appear to view any, even the slightest, innovation. Even in a small matter like the tops of pepper castors in cruets the Americans, improving on the old style, brought out pepper castors with screw tops, but, in spite of repeated requests, it is asserted that to this day the English article has the same old top which has to be squeezed on.

Take another case—butter dishes. The English article is a butter dish and that only, whereas the American has also a knifeholder attached. Trifling items like this seem to support the statement that, whilst Americans lay themselves out to supply a changing demand, British makers show a decided antipathy to innovations.

It is stated also that all goods imported from America are well finished, no matter how low in price. For instance, an effective pickle jar, with fork complete, invoiced at 2*s.*; the finish is good, outside and inside, without file marks or roughness, everything polished or friezed as if of the highest grade, and altogether in marked contrast with similar low-price English goods. Sample forwarded.

(*d*) Packing.—American plate is more economically packed. Pedestals for cruets, for instance, are placed one inside the other, and with the separate parts packed by themselves, so occupying in the whole less space than if the complete articles were packed together.

(*e*) Other causes.—It is complained that English makers, if they do not actually copy one another, yet do not produce patterns that differ in any material degree. Three plate travellers opened their samples here quite recently, and their goods were devoid of anything really new, and what appeared as novelties were shown by each.

The English maker by clinging so tenaciously to old patterns and style, and showing a decided objection to change even when asked, compels the importation of foreign goods, and from present appearances, in all but the very best descriptions of electroplate on hard metal, the foreign goods have come to stay.

52. SEEDS, GARDEN AND GRASS.

	1884.	1889.	1894.
	£	£	£
Total value of imports	4,547	2,644	4,277
From foreign countries—			
United States	—	66	140
Germany	167	40	360
France	10	66	63
Italy	—	—	97
Total value of direct foreign imports	177	152	660

Flower seeds come from Germany and France, melon and grass seeds from America, and bulbs from Holland.

Foreign seeds are imported principally, because, it is said, they are often of better quality than those from England.

56. SOAP, FANCY.

	1884.	1889.	1894.
	£	£	£
Total value of imports	—	2,528	2,622
From foreign countries—			
United States	—	66	342
Germany	—	40	7
France	—	11	38
Total value of direct foreign imports	—	117	387

Fancy soap was included with "perfumery" in 1884, and the value therefore cannot be given.

(*a*) Price.—The price is high for soaps from America.

(*b*) Quality and finish, and (*c*) suitability.—As the quality and appearance of perfumed soap from America are very good, the perfume delicate, and (owing to milling), the soap a lasting one, the trade is on the increase.

(*d*) Packing.—This soap is well and attractively boxed.

(*e*) Other causes.—Showy advertising matter and widely disseminated pamphlets, which, as in the case of patent medicines, are sent broadcast as packing inside cases, thus saving the manufacturer the cost of distribution.

57. SPIRITS.

(*a*) *Brandy.*

	1884.	1889.	1894.
Total value of imports	47,862	43,069	25,019
From foreign countries—			
Belgium	—	—	24
Germany	192	2,046	855
France	—	249	73
Norway and Sweden	2	—	—
Total value of direct foreign imports	194	2,295	952

(*a*) Price.—Cheap foreign spirit called brandy has been bought at 8*s.* 6*d.* and even less per case in bond, but superior brandy is quoted at from 33*s.* 6*d.* to 44*s.* and 45*s.* per case of 12 bottles.

SOUTH AUSTRALIA.

(*b*) Quality.—According to price. If a good pure spirit is demanded a good price must be paid.

Although brandy has been and is still largely imported, local distillers are asserting their position, and, to a considerable extent, supplying the requirement of the Colony.

In any case brandy is not a natural product of Great Britain, and its importation from foreign countries cannot, therefore, be looked upon as displacing similar goods of British manufacture.

Owing to the administration of the South Australian Trade Marks Act the introduction of cheap foreign brandies (some of it purporting to be of French manufacture, but in reality produced elsewhere) has almost ceased.

(*b*) *Cordials.*

	1884.	1889.	1894.
Total value of imports	1,289	952	684
From foreign countries—			
Germany	351	121	138
France	15	249	92
Belgium	5	—	40
Norway and Sweden	3	—	—
Total value of direct foreign imports	374	370	270

The importation of cordials is not a serious item; nor does it, as far as is known, displace British manufactures. For instance, such liqueurs as Curaçoa, Chartreuse, Benedictine, Kummel, Maraschino, and others, are all made on the Continent.

A local manufacture of these lines is obtaining a footing on the market, but the demand is very limited.

(*c*) *Geneva.*

	1884.	1889.	1894.
Total value of imports	1,743	1,977	773
From foreign countries—			
Belgium	157	33	128
Germany	—	278	174
Total value of direct foreign imports	157	311	302

All the Geneva imported is of foreign manufacture.

(*a*) Price.—In bond. Case of 15 bottles, reputed 3 gallons, actual content $2\frac{20}{32}$, 20 u.p., from 11*s.* per case; case of 15 bottles, reputed 4 gallons, actual content $3\frac{16}{32}$, 20 u.p., from 11*s.* 4*d.* to 12*s.* 9*d.*; case of 20 bottles, reputed 4 gallons, actual content $3\frac{23}{32}$, proof strength, 15*s.* per case.

(*e*) *Perfumed.*

	1884.	1889.	1894.
	£	£	£
Total value of imports	2,714	2,209	1,320
From foreign countries—			
United States	—	42	37
Germany	39	305	189
France	31	95	115
Total value of direct foreign imports	70	442	341

In perfumed spirits the English maker has been largely displaced owing, not to inferiority of spirit, but in a great measure to a lack of taste in the get-up of his goods. French perfumes are handsomely boxed and have a highly attractive appearance, and so, in scarcely less degree, are the American; but the English are usually very ordinary in appearance.

(*a*) Price.—Prices appear high for best French or American, but for lower qualities of German or French they are comparatively cheaper than English.

(*b*) Quality and finish.—The best English and French perfumes are about equal in perfuming power, but it is not always quality alone that causes sale.

(*c*) Suitability.—Nothing special.

(*d*) Packing.—It is under this head that preference is shown for foreign productions. Two sample boxes of well-known French and one of English make are forwarded, and explain the difference alluded to. On the one hand is a single bottle (often new and pleasing in shape) in its own case, handsomely got up, even the colour of the cotton wool in which the bottle is nested being considered. On the other is the severely plain and unattractive style common to many English makers. The foreign manufacturer tries to make his packing help sell his goods, while the British maker, as a rule, relies on quality alone, and is not always superior even there. There are, however, recent signs in some cases of a marked improvement as regards the appearance of such goods. Perfumes are frequently purchased for presents, and buyers naturally prefer the article most suited for the purpose. Some of the French perfumes, with this object specially in view, are nicely got up in attractive little caskets. Foreign perfumes also are largely purchased by chemists and others, not only on account of readier sale, but because they are acceptable additions to a shop window or a show case. Local productions are gradually making their way, mainly by reason of price.

(*e*) Other causes.—None.

(*f*) *Of Wine.*

——	1884.	1889.	1894.
	£	£	£
Total value of imports	3,527	32	25
From foreign countries—			
Germany	451	—	—
Total value of direct foreign imports	451	—	—

Importations have ceased owing to supersession by the locally-manufactured article.

(*g*) *Unenumerated.*

——	1884.	1889.	1894.
	£	£	£
Total value of imports	4,280	2,252	2,534
From foreign countries—			
Norway and Sweden	2	—	—
Germany	13	1,776	1,668
France	—	2	—
Belgium	80	—	51
Holland	—	—	91
Total value of direct foreign imports	95	1,778	1,810

The sweetened gin imported is almost exclusively of British manufacture, a small quantity only coming from Germany. A considerable amount is now produced locally.

Schnapps is entirely of foreign manufacture. The prices given are, in bond, for three different brands. Case of 12 bottles, 2 galls., 15 u.p., from 11*s.* per case; case of 12 bottles, 2 galls., 15 u.p., from 21*s.* per case; case of 12 bottles, 2 galls., 20 u.p., from 9*s.* per case.

63. Umbrellas.

——	1884.	1889.	1894.
	£	£	£
Total value of imports	—	10,786	10,708
From foreign countries—			
Germany	—	1	86
France	—	309	216
Total value of direct foreign imports	—	310	252

Umbrellas were included with "drapery" in 1884, and cannot therefore be separated now.

Samples of parasols and umbrellas from Japan have lately been submitted, but, being common in quality and rough in make, do not so far meet with favour.

64. Wood and Timber, Manufactured.

——	1884.	1889.	1894.
	£	£	£
Total value of imports	19,819	13,841	11,381
From foreign countries—			
United States	4,917	7,741	5,765
Germany	561	366	163
France	20	1	164
Belgium	157	15	10
Italy	24	—	—
Argentine	—	—	1
Total value of direct foreign imports	5,679	8,123	6,103

The only real competitor the English merchant has in this Colony is the American, and with the immense timber stocks of that country it is not easy to see how the foreign trade can be successfully attacked. The lines are very numerous, and the cost of production is, comparatively speaking, small. Under this general heading are placed staves, wash boards, clothes pegs, buggy woodware, such as rims, spokes, hubs, shafts, &c., handles for tools, &c.

Prices are not material to the question.

Staves.

Staves are largely used for blocking off cargo (filling up interstices) in American sailing ships, and when a New York vessel is not fully loaded a parcel of oak staves is not infrequently placed on board at a nominal freight for sale at best in this market.

Wash Boards and Clothes Pegs.

Wash boards and clothes pegs are too well known to require description, and the demand is great and increasing. There are no similar English goods on the market.

Buggy Woodware.

This is purely American, and the goods are greatly in favour on account of the lightness of draught of the vehicles when constructed, general handiness, durability, and suitability for Colonial work. As in all goods where wood is largely used, America has special advantages, hickory, ash, and other such woods being indigenous. The price is hardly a factor; it is the nature of the articles themselves and their usefulness in every-day work.

Picture Mouldings.

(*a*) Price.—Samples are forwarded showing prices in bond.

(*b*) Quality and finish.—The mouldings imported from America are superior in finish, and are of more artistic designs than those from Germany, and in some instances are cheaper. The German mouldings are heavy in character; the American are light, more effective, and pleasing to the eye. British gilt mouldings are almost unknown here.

(*c*) Suitability.—Suitable for requirements.

The price, and sometimes price and design combined, of the foreign goods generally brings them into demand.

(*d*) Packing.—Has no effect.

(*e*) Other causes.—None apparent.

Whip Handles.

(*a*) Price.—In bond, willow crops, 2½ ft. long, 6*s.* 10*d.* per dozen; 3 ft., 7*s.* 5*d.*; 3½ ft., 8*s.*; 4 ft., 9*s.* 2*d.*; 4½ ft., 10*s.* 3*d.* Hickory crops, 2½ ft. long, 3*s.* 3*d.* per dozen; 3 ft., 3*s.* 6*d.*; 3¼ ft., 4*s.* 4*d.*; 4½ ft., 5*s.* 6*d.* Samples are forwarded.

(*b*) Quality and finish.—Excellent.

(*c*) Suitability.—The wooden whip handles are very suitable for rough work, and are in large demand.

(*d*) Packing.—No effect.

(*e*) Other causes.—The willow goods are much superior to the English ash whip handles. They are better in finish and durability and are dearer, but still their superiority obtains for them a much readier sale. Hickory whip handles are peculiarly an American manufacture.

Window-blind Rollers.

(*a*) Price.—In bond, from 3*s.* 6*d.* per dozen. Sample forwarded.

(*b*) Quality and finish.—This is another class of goods imported almost ready for use. When the roller is fixed in a window it is far more simple in action than similar goods from England. For instance, the spring in the interior of the roller renders the American almost self-acting and does away with the endless cord and side attachment required by the English principle. The rollers themselves are neater in appearance, and the fittings for the ends of the same diameter as the roller. The brasswork ends of the English are clumsy in comparison, and the roller has to be made to fit the ends.

(*c*) Suitability.—American very suitable, and as the demand is considerable they have almost a monopoly.

(*d*) Packing.—Makes no difference.

(*e*) Other causes.—None beyond price being low and efficiency great, unless it be that protection by American patents gives them a strong position.

67. Woollen and Worsted Manufactures.

(*a*), (*b*), and (*c*) *Woollen Piece Goods.*

	1884.	1889.	1894.
	£	£	£
Total value of imports	28,983	28,937	35,462
From foreign countries—			
France	3,139	184	169
Germany	64	8	9
Total value of direct foreign imports	8,203	192	178

This heading does not include woollen dress piece goods; they are specially dealt with elsewhere.

(*a*) Price.—German invoice, coatings, 56 in. wide, black, 8*s.* 7*d.* and 7*s.* 2*d.* per yard; black, 6*s.* 11*d.*; indigo, 7*s.* 5*d.*; black, 6*s.* 6*d.*; indigo, 7*s.* per yard.

South Australia.

It is stated that in Germany in the large factories for the production of woollen piece goods only two classes of coatings are made, viz., the very best and the very common. There is hardly what could be termed a medium, a class in which the British manufacturer holds his own with ease. In the best classes, however, the German price is at least 10 per cent. below the English, nor is the latter article superior in quality.

In cheap woollens the prices of English and German are about equal, but the latter are superior in finish, quality, and greater variety of patterns. Samples are not at present available. In some instances it seemed as though the patterns of English tweeds had been copied, although the German productions were more sightly, having a pleasanter feel, soft and woollen in touch, while the English were harsh. In one case an English tweed was invoiced at 2*s.* per yard, while its German counterpart was shown at 1*s.* 6*d.* per yard, and this continued right through an extensive range of samples; both were single width.

The retail buyer does not know English from German, and naturally buys what will return him the most profit.

In better class fancy tweeds the Yorkshire, Scotch, and Irish manufacturers more than hold their own, but in the lower grade tweeds the Germans have a strong position, which is daily becoming stronger.

West of England tweeds are not in demand just now, the Belgian and German makers appearing to beat them all along the line both in quality and price. German imitations take the place of English tweeds in many instances, because they are from 15 per cent. to 20 per cent. cheaper, though not so good in quality.

In the worsteds of low and medium qualities the Yorkshire makers are supreme, but in best quality (all wool) worsteds the Continental manufacturers are in advance. Their goods are equal in appearance and finish, in novelty of design superior, and in price lower than English. In coatings, serges, vicunas, estamenes, &c., of cheap qualities, the German goods cannot be sold in this market, but in best qualities they are serious competitors. Continental dyes are said to be more fast and reliable, and this is one great reason for their popularity. Tailors, it is said, now ask for them owing to the better satisfaction given to customers.

The figures given are for direct importations, and therefore do not represent the volume of foreign trade in the lines quoted, which are being strongly pushed by Continental makers. A large quantity of their goods is being sold in this market.

From Japan have recently been received samples of broadcloths, heavy and light texture, all wool and mixed; narrow cloths, heavy and light texture, all wool and mixed; and woollen rugs. Although the industry appears to be in an experimental stage, the quality of the goods and the prices at which they are quoted indicate that the time is not far distant when Japanese broadcloths will find a large sale in the Colony. The woollen rugs especially are well turned out, stylish in appearance, equal to English in quality, lower in price by 10 per cent. to 15 per cent., and sell readily. These, it is said, cannot be distinguished from English rugs, the patterns of which seem to have been closely copied.

Woollen Dress Piece Goods.

	1884.	1889.	1894.
	£	£	£
Total value of imports	—	60,546	76,878
From foreign countries—			
Germany	—	87	326
France	—	774	728
Belgium	—	—	61
Total value of direct foreign imports	—	861	1,115

These were included with "drapery" in 1884, and the value cannot now be even estimated.

A large portion of the woollen dress goods imported is of foreign manufacture, but, owing to the system adopted by wholesale merchants in packing in London, most of it is shown as of British manufacture.

Among these foreign goods are cashmeres (plain and figured), merinos, crépons, fancy silk mixtures, poplins, grenadines, repps, serges of all kinds, including dress

coating serges, mohairs (plain and figured), lustres, canvas cloths, Sicilian alpacas, &c. Of late, however, mohairs and alpacas of English make have come into favour, and large quantities of Bradford goods in this class are being sold. Particulars are given under (*e*).

(*a*) Price.—Some samples of French goods, showing widths, are forwarded, with prices marked on each; but, owing to the almost unlimited variety, it is impossible to send anything like a complete range.

(*b*) Quality and finish.—The dyes in English manufactures are not so good or lustrous as either French or German, which have, as it were, a bloom upon them. The English, though good in quality, are deficient in this appearance, and are dull to view. It is estimated that from 75 per cent. to 80 per cent. of these goods were of French or German make, but the revival of the fashions for English mohairs and alpacas now reduces that percentage.

In cashmeres the English product is almost exclusively what is known in the trade as "union," or wool with an admixture of some other material, while the French cashmeres are all wool.

Goods of German manufacture are coming strongly into prominence, and are said to be lower in price and to surpass similar British goods in design.

(*c*) Suitability.—Foreign goods, particularly of French make, are more suitable for the climatic requirements of South Australia.

(*d*) Packing.—Nothing special; mostly done in London.

(*e*) Other causes.—Apart from the better quality of the foreign dyes, the French makers treat the wool differently, and generally the artisan has a finer artistic taste and is a more delicate manipulator than the English.

Then again, the British manufacturer appears to be more indifferent or not so fully alive to the value of novelties and the ever-varying demands of fashion. Buyers are always eager to obtain "the latest thing," and the absence of it is no mean handicap. Beyond this, it is contended that the foreign manufacturer not only makes a departure on his own account, but is prepared to produce goods in any way to suit the requirements of his client. The British manufacturer is not so complacent; and if, for instance, he has been in the habit of putting up piece goods in 60-yard lengths, he will not supply two lengths of each 30 yards in order to meet the local demand.

(*d*) *Blankets.*

——	1884.	1889.	1894.
Total value of imports	16,337	11,821	8,887
From foreign countries—			
France	304	74	—
Germany	—	6	—
Total value of direct foreign imports	304	80	—

The foreign importations are so small as to have no effect on this particular sub-head.

(*f*) *Carpeting.*

——	1884.	1889.	1894.
Total value of imports	18,976	15,504	10,467
From foreign countries—			
Germany	66	—	2
France	220	53	110
United States	—	3	—
Total value of direct foreign imports	286	56	112

The importation of foreign carpeting also is too small to affect trade.

NOTE.—*The following goods are not specially mentioned in the headings specified in the Secretary of State's despatch, but, as their importation from foreign countries assumes considerable proportions and interferes with British trade, particulars are forwarded.*

LAMPWARE.

——	1884.	1889.	1894.
Total value of imports	7,284	6,967	6,869
From foreign countries—			
United States	1,191	1,252	1,774
Germany	65	659	1,198
Belgium	5	—	327
France	22	—	—
Total value of direct foreign imports	1,283	1,911	3,299

The variety of lamps imported from Germany and America is too great to specify.

(*a*) Price.—From 12*s.* per dozen in Germany. A sample is forwarded.

(*b*) Quality and finish.—The price quoted is for a German lamp known as the "Bismarck," which at that price is good value. For better class lamps the patterns are much in demand, and do not appear to be obtainable in England. They are effective in appearance and of comparatively low cost. The American lamps possess great illuminating power, in some instances equal to ordinary gas; the designs also are good.

(*c*) Suitability.—Nothing but price and design.

(*d*) Packing.—Attention is directed to the economical packing of the sample forwarded, and to the construction of the lamp itself apparently for that purpose. The shape of the stand permits the reservoir to be packed inside it and the opal shade over it, while the gallery takes up no extra room, so that the lamp complete is placed in one small compact and convenient cardboard box in such a manner that breakages are very rare indeed. For general packing each country appears to be equal.

(*e*) Other causes.—None apparent.

BICYCLES.

Bicycles and perambulators have been included in Customs returns, until the end of December 1895, under the heading "vehicles not otherwise enumerated," and no estimate of values can be given.

(*a*) Prices.—Bicycles are imported in so many different styles, and are sold under such varying conditions, that no information of value can be given.

(*b*) Quality and finish.—The recognised makers of English bicyles produce a machine of excellent quality, and obtain a good price, but it is said to be, as a rule, heavier than the American, American bicycles with wooden rims have taken a hold here. It is complained that English goods do not always come up to sample, and a merchant reports that he had to sacrifice some on that account. His orders are now placed in America. It is also said that English makers will not accept suggestions from Colonial buyers. One merchant mentioned an improvement, and asked to have it made. He received the goods with a reply to the effect that the pattern could not be altered. This importer also now sends his orders to America.

(*c*) Suitability.—All appear equally suitable.

(*d*) Packing.—American bicycles are packed in light open framework of wood about $\frac{3}{8}$ in. thick, for which no charge is made, but English are packed in cases and charged for.

(*e*) Other causes.—American manufacturers are more ready to make their machines to suit clients.

It is said that there is great difficulty in obtaining bicycles from England, the demand appearing to exceed the supply. Orders for even half a dozen or so are sometimes kept unsupplied for several months, and then perhaps only partly executed. Some have just come to hand that were ordered nine months ago. English machines are in favour here, but they can be supplied only after most vexatious delays, which almost force the purchase of foreign articles, more readily obtainable. The superiority of

English machines is not so fully established that makers, with such a method of doing business, can expect to retain their hold on the market.

PERAMBULATORS.

(*a*) Price.—A price list from a large American house is forwarded.

(*b*) Quality and finish.—The designs and finish of American perambulators are superior to British. The English maker is said to be too conservative to alter his styles, while the American is constantly producing some improvement in design, construction, wheels, &c., to supply a light yet strong and presentable article which will minimise labour in use. As an instance, recent importations from America have been fitted with an effective brake attachment, which has not added to the cost, but renders the vehicle more useful for outdoor use. It is claimed also that the hooding of American perambulators is much superior to British, and that the construction of English bodies is unsuitable for a warm climate. In weight the difference is most marked, the English article, although smaller, being much heavier.

American wheels are fitted with india-rubber tyres and ball bearings, and run smoothly and lightly. The English, although fitted with india-rubber tyres, have no ball bearings, and are consequently heavier in draught.

Springs also show to the advantage of the American maker, the ironwork being brightly tinned to look like electro-plated ware, and give the carriage a light and elegant appearance. In English vehicles the springs are painted.

One large importer felt compelled to clear his stock of English goods at a loss, as they would not sell. The most recent catalogues from England show no variation in style.

The American upholstery is superior in variety of design and finish and equally durable.

(*c*) Suitability.—This has been included in quality and finish.

(*d*) Packing,—Packing is good.

(*e*) Other causes.—American makers go to a great deal of trouble and some expense in bringing prominently before their customers an exact representation of the goods they make, even to the length of sending unmounted photographs of anything produced between the issues of their periodical illustrated catalogues. One recently received is forwarded.

WRINGERS.

——	1884.	1889.	1894.
		£	£
Total value of imports - - - - -	—	2,494	1,154
From foreign countries—			
United States - - - -	—	1,355	736
Total value of direct foreign imports	—	1,355	736

Wringers were shown under another heading in 1884, and the values cannot now be given.

(*a*) Price.—American, from 12*s.* 3*d.* for 12 in. upwards.

(*b*) Quality and finish, and (*c*) suitability.—American wringers are more suitable for this country, being lighter in construction, handier, and easier to work. The American goods are fitted with india-rubber rollers, while those from England usually have wooden ones. For domestic use the former are preferred. English wringers are more expensive, so that even if other things were equal, the price tends to keep them out of the market.

(*d*) Packing.—Has no effect.

(*e*) Other causes.—None; price, combined with efficiency, being the advantages claimed for foreign goods.

SOUTH AUSTRALIA.

SUMMARY OF RETURN.

TOTAL IMPORTS, AND IMPORTS DIRECT FROM FOREIGN COUNTRIES, OF THE UNDERMENTIONED ARTICLES.

Commodity.	1884. Total.	1884. Foreign.	1889. Total.	1889. Foreign.	1894. Total.	1894. Foreign.	Three Years. Grand Total.	Three Years. Foreign.
	£	£	£	£	£	£	£	£
Alkali soda silicate	283	—	562	—	821	66	1,666	66
Apparel and slops	230,124	8,527	183,907	1,835	122,786	1,758	486,817	11,620
Mole clothing	23,676	401	21,175	125	19,881	251	64,732	777
Arms	8,647	1,186	3,155	1,010	3,120	1,374	14,922	3,570
Powder, sporting	4,184	—	4,090	—	1,450	76	9,724	76
Dynamite	17,742	5,815	32,047	2,076	30,959	550	80,748	8,441
Powder, blasting	7,504	—	2,694	—	11,187	2,991	21,385	2,991
Ammunition, other kinds	8,150	330	9,342	2,168	8,879	955	26,371	3,453
Beer and ale	75,362	14,792	60,818	14,740	29,429	4,921	165,609	34,453
Books, printed	59,194	1,945	39,935	970	41,470	1,131	140,599	4,046
Brushware	18,897	1,013	7,825	768	7,998	1,841	29,715	3,622
Brushmaking material	—	—	2,313	106	3,272	489	5,585	595
Candles	37,441	24,837	13,458	6,483	11,171	7,829	62,070	38,649
Caoutchouc(india-rubber goods)	3,877	146	3,291	804	5,664	237	12,832	687
Cement	12,344	1,831	5,616	882	3,746	2,235	22,706	4,938
Drugs and chemicals	74,303	4,606	33,088	1,401	45,926	3,541	153,317	9,548
Dyestuffs	--	—	1,280	50	1,581	199	2,861	249
Clocks and watches	25,326	1,747	12,641	1,541	11,531	2,338	49,498	5,626
Coke	2,322	—	69,614	6,574	150,305	36,811	222,241	43,385
Cordage, steel wire	—	—	3,663	188	1,150	—	4,813	188
Hosiery	—	—	46,491	952	56,855	4,681	103,346	5,633
Cotton piece goods	264,218	10,676	188,038	3,441	239,038	4,384	691,289	18,501
Earthen and china ware	36,515	590	21,247	1,041	18,228	1,033	75,990	2,664
Fish, preserved	37,866	933	18,982	1,144	18,979	350	75,827	2,417
Furniture	45,826	6,392	26,376	5,536	14,681	3,912	86,885	15,840
Glass, plate and sheet	9,018	407	5,069	208	2,652	1,876	16,739	2,486
Glassware (including bottles)	13,415	585	14,418	1,946	12,654	3,557	40,487	6,088
Grease and tallow	1,887	1,171	—	—	—	—	1,887	1,171
Haberdashery and millinery	370,476	14,415	277,892	3,879	223,005	5,276	871,373	23,570
Cutlery	10,461	203	8,535	891	10,353	865	29,349	1,459
Hollow-ware	2,928	1	4,269	458	3,877	539	11,074	998
Nails and screws	13,530	1,122	12,347	1,159	8,876	3,405	34,753	5,686
Hardware and ironmongery (not otherwise classified).	79,932	6,764	16,622	1,747	22,423	1,891	118,977	9,902
Hats, straw	—	—	16,043	1,267	17,897	214	33,940	1,481
Hats, men's felt	—	—	13,793	141	11,139	1,300	24,932	1,441
„ boys' and youths' felt	—	—	3,540	24	785	85	4,325	109
Agricultural implements	46,352	17,916	15,551	4,226	14,014	3,201	75,917	25,343
Sewing machines	17,691	6,192	18,149	2,696	10,293	5,315	46,133	14,203
Tools	41,873	10,752	27,034	7,748	25,694	6,780	94,601	25,280
Scientific instruments	6,310	462	4,952	477	7,152	1,013	18,414	1,952
Leather, unwrought	14,381	3,198	15,321	2,116	18,635	1,909	48,337	7,223
Leatherware	—	—	3,476	573	2,038	25	5,514	598
Leather boots and shoes	126,360	3,195	81,832	1,889	66,264	2,182	274,456	7,216
Engines, steam	17,692	—	13,062	1	3,324	586	34,078	587
„ of other sorts	40,779	5,368	64,543	8,932	35,727	6,166	141,049	20,456
Boilers, steam	524	—	2,428	—	975	101	3,927	101
Medicines, patent	—	—	—	—	23,768	2,428	23,768	2,428
Iron, pig	5,584	1,799	25,207	2,672	9,207	794	39,998	5,265
„ wire	34,955	777	38,456	11,724	34,742	21,234	108,153	33,735
„ plate and sheet	5,120	469	15,459	—	5,064	171	25,643	640
„ galvanized, corrugated	87,964	—	25,678	938	24,794	7,009	138,436	7,947
„ manufactures of metal (principally iron or steel).	25,399	1,839	48,855	3,225	44,627	2,960	118,881	8,024
„ bar, angle, bolt, or rod	40,969	2,342	27,913	—	26,735	964	95,616	3,306
„ steel, unwrought	5,400	3	12,121	276	11,631	1,499	29,152	1,778
„ wheels and axles	7,652	100	1,228	406	15,146	12,904	24,026	13,410
„ zinc, unwrought	2,537	90	4,409	260	5,544	4,232	12,490	4,582
Musical instruments	27,966	10,273	16,104	6,454	16,933	10,991	61,003	27,718
Oil and floor cloth	8,319	97	10,633	—	12,877	1,068	31,829	1,165
Paints and colours	15,249	887	12,178	1,072	9,648	539	37,070	2,498
Paper, wrapping	5,385	127	9,656	892	12,591	1,154	27,632	2,173
„ bags	4,844	15	2,515	1,140	1,881	627	9,240	1,782
Plate and platedware	11,583	1,499	12,244	1,732	7,879	708	31,706	3,939
Seeds, grass and garden	4,547	177	2,644	153	4,277	660	11,468	990
Soap, fancy	—	—	2,528	117	2,622	387	5,150	504
Spirits, brandy	47,862	194	43,069	2,295	25,019	952	115,950	3,441
„ cordials	1,289	374	952	370	684	270	2,925	1,014
„ Geneva	1,743	152	1,977	311	778	302	4,498	765
„ gin	3,394	3	3,796	295	1,092	2	8,272	300
„ perfumed	2,714	70	2,209	442	1,320	341	6,243	853
„ of wine	3,527	451	32	—	25	—	3,584	451
„ unenumerated	4,280	95	2,253	1,778	2,534	1,810	9,066	3,683
Umbrellas	—	—	10,786	310	10,708	252	21,494	562
Wood and timber	19,819	5,679	13,841	8,123	11,381	6,102	45,041	19,904
Woollen piece goods	28,983	3,203	28,937	199	35,462	172	93,382	3,573
„ dress piece goods	—	—	60,546	861	76,878	1,115	137,424	1,976
Blankets	16,337	304	11,821	80	8,887	—	37,045	384
Carpeting	18,976	286	15,504	36	10,467	112	44,947	434
Grand totals	2,244,795	188,813	1,845,070	138,852	1,813,070	209,944	5,902,937	537,609

WESTERN AUSTRALIA.

No. 26.

SIR GERARD SMITH to MR. CHAMBERLAIN.

(Received June 8, 1896.)

Government House, Perth, Western Australia,
May 8, 1896.

SIR,

WITH reference to your Despatch to Governors of Colonies of 28th November 1895, I have now the honour to enclose herewith the report of the Collector of Customs in this Colony dealing with the questions upon which information was requested.

2. The only point upon which I desire to comment is that of iron and steel rails for railways. The earlier railways constructed in this Colony were laid with 45¼ lbs. iron rails manufactured in England, but since the introduction of steel rails throughout the railway world there has been here, as elsewhere, a gradual process of replacement of iron by steel, which is still proceeding, the weight of rails having been increased from 45¼ lbs. to 65 lbs. per foot to meet increased speeds and heavier traffic.

3. My own experience and belief is that even now the United Kingdom can compete with foreign countries successfully in the production of the lighter descriptions of iron rails such as are commonly used for sidings or light lines, and are still in use on many branch lines in the United Kingdom, but as regards steel rails of the heavier descriptions now indispensable on main lines, the superiority of the work turned out by Messrs. Krupp at Essen is most manifest. The causes are simply superiority both of the ore material used and the process of manufacture, and cheaper coal and labour. In effect, where iron goods only are concerned the United Kingdom holds its own, but in the manufacture and tempering of steel of all descriptions, including the finest surgical appliances, edge tools, and machine tools of all descriptions, America and Germany have pushed us out of the market.

I have, &c.,
GERARD SMITH,
Governor.

Enclosure in No. 26.

From the COLLECTOR of CUSTOMS, Freemantle, to the Honourable the PREMIER, Perth.

SIR,

March 23, 1896.

I HAVE the honour to report upon the Despatch of the Right Honourable the Secretary of State for the Colonies, of the 28th November last, to his Excellency the Governor, and forwarded by you to me, as follows:—

The trade of Western Australia in years past has been so small that no scope has been allowed for anything approaching active competition in respect to goods of foreign production. A few direct shipments have, indeed, reached our markets; but these are in a small way. In addition to these, small parcels of produce which are hard to distinguish, owing to filtration through countries under the British flag, are continually coming into the Colony in company with British trade, a statement of which I regret I am unable to supply owing to the records of the Customs not furnishing the requisite information. I have, therefore, with the exception of "Spirits" and "Railway Material," based my returns on direct shipments.

Foreign produce has come to hand from America, France, Germany, Norway, Holland, and China, but in many instances it is made up of lines unenumerated in the Annexe to the Despatch, *e.g.*, teas, kerosene, timber, brandies, gins, wines, &c., essentially recognised as foreign trade, and in respect to which the Despatch is silent.

In the return forwarded herewith I have set forth, of those entries sought for, only those that give at least 5 per cent. of their respective importations. Compared with the large number of imports of which particulars are required, these entries appear insignificant; but it must be borne in mind that Western Australia, in her inception of trade from the earliest settlement, has been immediately in touch with Great Britain and the sister Colonies, from whence, with scarcely perceptible variation, she has drawn

WESTERN AUSTRALIA.

supplies. Trade, however, of late, owing to the extraordinary mineral wealth of the Colony, has materially increased, as shown by the following figures relating to imports :—

Years.	£
1890	874,447
1891	1,280,093
1892	1,391,109
1893	1,494,438
1894	2,114,414
1895	3,774,804

and as soon as these figures, more especially those relating to the last 12 months, are appreciated abroad, and furthermore, when it is known that trade is increasing by leaps and bounds, the foreign trader will see his way clear to arranging direct freights and regular services, and secure a share in Western Australian commerce.

The most important import I can at present place my finger on is iron and steel rails for railways. Though the Government, when purchasing, gives a preference to British manufactures, I have gathered from a large importer that, in his opinion—and it is that of a reliable man—German rails supplied to him by Messrs. Krupp, on contract, "were the lowest in price, and were supplied in accordance with specification, and turned out most satisfactory." I am not prepared to assign a cause for such a state of affairs ; but it appears to me that a solution will probably be found to partly or wholly exist in the question of labour. But this is a matter only English experts could be expected to decide. I cannot but think, however, that a comparison of the rates of wages of British and foreign workmen, in their respective trades, will disclose the fact that in the relation of wages to labour and cost of living, considerable light will be thrown upon the subject. Permit me to illustrate my assumption :—

In a country where wages and cost of living are low, five men do the work of four men in the higher wage country at the same or even less cost to the producer, and by the additional craft and labour brought to bear upon their trade place a better article, at perhaps a lower price, in the markets of the world than the older manufacturing and larger wage country.

Were this item "iron rails" taken as a test case, I feel sure that much valuable information would be obtained on what appears to me to be as much a "social problem" as a question of trade.

In the past ten years Russia has doubled, Germany nearly doubled, and Japan trebled their trade. This element of labour will probably be found to have had a good deal to do with the success of these countries.

As regards the United States, the expanding trade of that go-ahead country is in a large measure due to her tactics of protection. Wages are, I believe, higher in America than they are in the British dominions, and from there, notwithstanding my premises in relation to labour in European and Asiatic countries, goods have been known to undersell those produced at less cost in other places. This is partly due to a clever manipulation of surplus stocks which are frequently cleared from the country at a sacrifice rather than retained and sold at such figures as would bring down her own market prices. In the course of inquiry I have gathered that a large quantity of woodware, such as clothes pegs, tool handles, and such like manufactures, including carts, carriages, and wagons, which are imported into British dominions from America, is made in the prisons, and is debarred from entering America's high-priced markets, and shot into the export trade. There is no doubt that the competition of the Americans is due to clever legislation, active pushing of the country's wares abroad, and combination of trade for the mutual protection of *internal* as opposed to *external* trade.

In conclusion, permit me to observe that, with the free-trade policy by which goods produced at lower cost in foreign countries are permitted to compete with British produce, results are obvious.

The federation of the British Possessions and protection against the world is, it appears to me, the only way in which the trade of Great Britain, and her scattered Possessions can be safeguarded against foreign enterprise.

I have, &c.,

CLAYTON T. MASON,
Collector of Customs.

Return of Importations into Western Australia for the Years 1884, 1889, and 1894, distinguishing years separately, and in their agregate, with a Report upon each Article.

No.	Commodity.	1884. Total Value of Importations.	1884. Value of Importations from Foreign Countries.		1889. Total Value of Importations.	1889. Value of Importations from Foreign Countries.		1894. Total Value of Importations.	1894. Value of Importations from Foreign Countries.		Total. Total Value of Importations.	Total. Value of Importations from Foreign Countries.		Reports.
		£		£	£		£	£		£	£		£	
4	Arms and Ammunition— *a.* Firearms	—	—	—	1,249	America	248	2,515	America Germany	230 12	3,764	America Germany	478 12	Consisting chiefly of Colt's revolvers and Colt and Winchester repeating rifles, the latter of which are preferred by kangaroo hunters.
	c. Of all other kinds	—	—	—	—	—	—	1,578	America	149	1,578	America	149	Cartridges.
40	Metals— *a.* Iron — Cast or wrought, and all other iron manufactures.	—	—	—	—	—	—	2,579	Germany	371	2,579	Germany	371	This importation, further detailed, is iron wire netting. The report received on this is that the English wire is from 5*s.* to 10*s.*, and even 15*s.*, per ton dearer, and the quality is not considered to be very much better, no complaints being made about the German wire.
37	Machinery, Agricultural	—	—	—	—	—	—	1,188	America	161	1,188	America	161	Evolved from American "patents" (reapers and winnowers).
36	Linen and Jute Manufactures, Sail Cloth, and Sails.	—	—	—	2,131	America	149	—	—	—	2,131	America	149	Consisting of cotton duck; American being preferred to British on account of extra strength and durability.
64	Wood and Timber manufactured, N.O.E.	—	—	—	6,563	America	1,521	28,135	America	2,009	34,698	America	3,530	Many of these manufactures, consisting principally of clothes pegs, handles, &c., &c., as well as carts, carriages, and wagons, are the produce of American prisons.
30	Hardware	—	—	—	10,560	America	1,222	—	—	—	10,560	America	1,222	The sailing vessels trading between America and Western Australia, which arrive at irregular intervals, could not be depended upon in the matter of despatch for meeting the excessive demands of the goldfields' trade of 1894; hence the transfer to regular services of Great Britain and the Colonies.
57	Spirits	15,591	—	12,019	25,841	—	15,043	55,322	—	19,461	96,754	—	46,523	These importations, which have filtered through British Colonies, are, as far as the country of origin is concerned, lost. The spirits so allocated consist chiefly of brandy, gin, and liqueurs, the bulk of which come from France and Holland.
40	Iron and Steel Rails	—	—	—	—	—	—	55,814	Germany	53,179	55,814	Germany	53,179	These are stated to have been procured from Messrs. Krupp, on contract. They were the lowest in price, and were supplied in accordance with specifications, and turned out most satisfactory.

March 23, 1896.

Clayton T. Mason,
Collector of Customs.

TASMANIA.

No. 27.

LORD GORMANSTON to Mr. CHAMBERLAIN.

(Received, August 24, 1896.)

Government House, Hobart, Tasmania.
11th July 1896.

SIR,

REFERRING to your despatch of the 28th of November last, transmitting copy of a letter which you caused to be addressed to the Agent-General for Tasmania regarding the return of Colonial Export Trade, I have the honour to forward a letter which I have received from my Prime Minister covering correspondence on the subject referred to.

I have, &c.,
GORMANSTON.

Enclosure in No. 27.

Premier's Office, Hobart,
8th July 1896.

MY LORD,

REFERRING to the General Despatch from the office of the Secretary of State dated 28th November 1895, I have the honour to forward, herewith, a copy of the correspondence on the subject of foreign competition with British colonial trade, which has been forwarded to the Agent-General in London.

I have, &c.
E. N. C. BRADDON,
Premier.

Premier's Office, Hobart, 1st July 1896.

SIR,

IN reply to your despatch of the 2nd December last, I have the honour to forward, herewith, a carefully prepared memorandum in which my colleague the Treasurer gives, as fully as possible, the information sought by the Right Hon. the Secretary of State for the Colonies on the subject of foreign competition with British colonial trade.

As regards the formidable question of a Customs Union between Great Britain and Australasia whereby the former shall be placed in better trade relations with her colonies than those existing in regard to foreign countries, I confess that I can see no other way of effecting this than by Great Britain conceding to her colonies compensation for so much of their customs duties as are derived from the importation of British goods other than intoxicants and narcotics. The revenue requirements of the Australasian colonies and the impracticability of compensating by other forms of taxation for the amount to be sacrificed in the shape of Customs duties forbid the entertainment of any other project. And the compensation which on the basis of 1894 collections would make good this loss to Australasia would be 3,118,000*l.*, a sum that would be very materially reduced by the imposition through these colonies of an uniform tea duty of 3*d.* per lb., and in the manner mentioned in paragraph 3.

	£	£
The total customs duties collected in the Australasian colonies in 1894 amounted to		7,800,000
Of which intercolonial duties other than duty on sugar were		700,000
Leaving		7,100,000
Of this sum intoxicants and narcotics represent	3,182,000	
Sugar	600,000	
Tea	200,000	
		3,982,000
Leaving for compensation		3,118,000

less as much as may be represented by goods imported from other than British possessions, supposing such importations were continued.

I have, &c.,
E. BRADDON.

The Treasury,
Hobart, 24th June 1896.

MEMORANDUM for the Honourable the PREMIER, in reply to letter of Sir R. G. W. HERBERT, Agent-General, accompanying the Circular Despatch of the Right Honourable the SECRETARY of STATE for the COLONIES, JOSEPH CHAMBERLAIN, to His Excellency the GOVERNOR of the COLONY, on the subject of TRADE with the UNITED KINGDOM.

With attention arrested by the importance of the subject, I have delayed my response until now with a view to placing you with information gathered from the traders in the many departments covered by the wide definition "British Colonial Trade."

Although the denominations of goods to which attention is directed follow those under which all statistical information for trade purposes is prepared, and are most generally in agreement with those used by the Board of Trade, I found it impossible to take up denominations and attach from our import entries the money value to the individual articles embraced therein; for example, the sub-divisions of our statistical returns do not enable any reliable separation for purpose of value of haberdashery from millinery, nor of British from Foreign manufacture, and neither Customs nor Chambers of Commerce, to all of which my enquiries have been addressed, could enable me to compile returns which I can send with any hope that Mr. Secretary Chamberlain can place complete reliance upon them: yet he may be able to form conclusions which, while in detail are not correct, may, in the concrete, be of value.

To secure the most accurate information I have instituted enquiries by experts of the leading wholesale and retail traders both at Hobart and Launceston, and have obtained the information almost from door to door, but, limited as it is, it is yet of more value than any information our Customs Entries for Home Consumption can give.

These enquiries have occupied much time, with very little to show for them; but I am of opinion that the course of trade in this smaller community is a fair indication of trade in the larger communities of Australasia, and that the conclusions arrived at here, after minute enquiries, is a fairer index of the character and movements of trade generally than any conclusions formed from purely official statistical returns.

All customs entries are noteworthily incorrect in value sterling, and the record of country of exports very misleading, and no indication as to the country of manufacture. Where the most definite answers are given from published returns to Mr. Secretary Chamberlain's enquiries, I venture to state the least reliance can be placed upon them.

Estimates very possibly approximate to the value of the trade may be supplied, but the description of the article accompanying that value will be very defective, and especially so in disclosing the country of manufacture.

Paragraph 3 of Mr. Secretary Chamberlain's despatch of 28 November 1895, deals with value of the trade, and reasons which weigh with colonial importers for their preference for a foreign article. Both enquiries have been in mind in preparing the return which I have the honour to attach. To another branch of enquiry, viz., that of paragraph 7, "Products which might advantageously be exported to United Kingdom, &c., but which do not at present find a sufficient market there," a separate schedule is enclosed. In that schedule wheat finds a place; but it is without, on my part, any belief in the utility of considering how Australasia can enter into successful competition with Wisconsin, Manitoba, Egypt, India, and the Danubian Principalities. Wheat at Liverpool at the price of last year, 20*s.* to 24*s.* per quarter, could not be displaced by Australasia even with a differential duty of 4*s.* per quarter in its favour, and the statement repeated by Mr. Lowles, M.P. for Haggerston, on the authority of a Canadian statesman, that 1*s.* per quarter would turn the course of trade, does not apply to us.

The chief products of Tasmania for which British markets should be satisfactorily sought are butter, cheese, fruit, hops, bark, timber; other Tasmanian products have already a possession of those markets which cannot be improved upon.

The general question of United Empire trade is to Australasia premature, as it means practically Free Trade. There is no other colony of this group than New South Wales which is likely to raise sufficient revenue from sources of direct taxation and land, and to abandon or even to materially differentiate Customs dues with United Kingdom must be deferred to a more convenient season. The "better terms" asked for than Canada offered for a preferential trade with United Kingdom are unlikely to be negotiated, attractive though the purpose be. We all profess to aim at securing that which is in the highest degree advantageous to the welfare and prosperity of the Empire, but self-preservation is the first law of nature, and necessitates in these integral parts of the Empire the maintenance for the present by individual colonies of high *ad valorem*

duties. Neither if they would, could the value of the United Kingdom's trade with its colonies and possessions grow to such proportions as to compensate for the jeopardy of that far larger trade enjoyed by the United Kingdom with foreign countries. The mission of Mr. Lowles, M.P. for Haggerston and member of the United Empire Trade League, is *à propos* of this general subject, and has been of a pleasing character, but cannot, I fear, secure any important results. The purpose of the League, like that disclosed by Mr. Secretary Chamberlain's despatch, is attractive, but the results likely to prove discouraging.

P. O. FYSH, Treasurer.

IMPORTS INTO TASMANIA, 1895.

It is impossible to give years 1884, 1889, and 1894 separately, or to place the value or description under headings "from Foreign Countries" or "Foreign Countries imported from." The whole of Tasmania's imports came through "British sources."

3. APPAREL AND SLOPS.—In such articles of wearing apparel as kid gloves, fabric gloves, laces, embroideries, Swiss muslins, ribbons, and felt hats, the Foreign goods are preferred to the British in that they are more sightly, much finer, of better finish, and in the case of hats and gloves a superior and faster dye is apparent, and they can be produced cheaper.

The proportion of Foreign imports to British would be, approximately, two-thirds Foreign, one-third British.

Slops are entirely confined to Great Britain, with the exception of oil goods, which are chiefly of American manufacture, and are imported not so much on account of better value, as they are about equal to British, but because freight and insurance from America is so much less.

14. CEMENT.—Cements are entirely of British production.

18. CLOCKS AND WATCHES.—The bulk of the cheap clocks imported are chiefly American manufacture, being much better got up, superior in appearance, and considerably lower in price than the British article. Lower and medium grades in watches are nearly all of Swiss and American manufacture, the British article being almost entirely cut out of the market, though in the high grades the British manufactured articles are still preferred, very few good watches being imported. The Foreign trade might be estimated at about 80 per cent.

20. ROPE, CORDAGE AND WIRE ROPE.—Entirely British.

23. COTTON MANUFACTURES.—Germany has largely increased her trade in this Colony in all classes of hosiery, and is seriously injuring the trade of Great Britain; in low grades she is almost unrivalled, most of the British merchants obtaining their cheap hosiery from Germany, in fact, you will scarcely find an English merchant whose shelves do not contain German hosiery, both high and low class goods. In cotton and cashmere they are equal in quality, and much better value than can be obtained in the home market. The trade with Germany in this branch is steadily increasing, and must have advanced 50 per cent. in the last 10 years. The only line that is likely to displace "British goods" in printed cottons is printed flannelettes, which are manufactured in an endless variety of patterns in low qualities, which are selling very freely.

24. EARTHEN AND CHINAWARE.—British goods still take the lead here, but are gradually being superseded by the German, especially in the cheaper lines of eathenwares, such as candlesticks, vases, household crockery, &c. The principal feature being better and newer designs, cleaner finish, fresh colourings, and are generally all round much better value; the proportion of trade being 60 per cent. British, 40 per cent. Foreign, with the Foreign trade on the increase.

26. FURNITURE.—The importations of furniture are very small, being principally confined to wood and cane-bottom chairs from America, and bent-wood furniture from Austria. Britain is not a competitor in this trade. Other classes of furniture are principally of Colonial manufacture.

27. GLASS.—(*a*) *Plate, rough, silvered.* (*b*) *Flint.* (*c*) *Common bottles.* (*d*) *Other sorts.*

(*a*) All the plate and fancy coloured glass imported to this Colony is of British manufacture.

(*b*) and (*c*) Entirely British.

(*d*) Whilst the importations of sheet glass consist almost entirely of Belgian manufactured goods; the reason for this is that the Belgian glass is cheaper, and can be laid down for considerably less.

29. HABERDASHERY AND MILLINERY.—American and German haberdashery in metal goods, such as buckles, buttons, crochet-hooks, hair-pins, safety-pins, hooks and eyes, is the most sought after. American patent lines chiefly. In both cases they are much better value than similar lines manufactured in Britain; the same applies to wools, braids, and bindings.

The millinery imported into this Colony is almost exclusively of English manufacture.

30. HARDWARE AND CUTLERY.—America is at present doing the best business in hardware, with Germany in close competition, but Britain still holds pride of place in the manufacture of cutlery, and there is no doubt that it will be a hard matter for the foreign merchant to compete successfully against her in this line; still, the Germans have got the thin edge of the wedge in, and as they are sending travellers to all parts of the Colonies, and taking fair orders for a lower class of goods, which are got up very attractively and are very good value, there is every reason to suppose that they will do better in higher qualities as their knowledge of the trade increases. Their percentage of the trade is about one-tenth of the whole.

32. IMPLEMENTS AND TOOLS OF INDUSTRY.—These goods were at one time exclusively imported from English houses, but America and Germany entering into competition, and not being as conservative as the British merchant, whilst also supplying an equally good article at a lower rate, their trade has increased until their imports are a trifle over two-thirds of the total. One great element of the success of American and German manufactures is (and this applies to all classes of tools and hardware) that they will take the trouble to ascertain the special requirements of any particular trade, and make a special article to suit that trade; whereas the British manufacturer shows his range of patterns, and if there is nothing suitable amongst them he will decline to do business rather than alter or make new shapes even if the order is a large one, and so naturally the trade drifts to the man who will make what you want, and the average merchant has not patriotism enough to pay 3*s*. 6*d*. for a tool of British manufacture if he can get a similar tool of foreign manufacture for 3*s*.

34. LEATHER.—(*a*) *Unwrought.* (*b*) *Boots and Shoes.*

(*a*) Foreign imports very small.

(*b*) The trade in light goods is principally confined to Germany and Austria, these countries turning out a much better fitting article, lighter in appearance and superior finish, at a much less cost, with a greater attention to detail, than the British manufactured article. Within the last 18 months America has entered the ranks of competitors, with an entirely different class of goods in both men's and women's footwear, and importers generally have increased their orders, and predict a good trade with America in the near future. In the heavier class of men's goods the British manufacturer still does the bulk of the business of this Colony; the trade in canvas and rubber shoes is also mostly British at present, but American goods are fast displacing them.

The percentage of Foreign trade as against British is at least 75 per cent. of the total imports.

(*c*) *Of other sorts.* (*d*) *Saddlery and harness.*—(*c*) and (*d*) The importation of saddlery, harness, &c. to this Colony is limited, if not entirely confined to Britain and America, this, as in many cases, the lower class of goods coming from America and the better class from Britain.

The percentage of imports is about three-fourths British and one-fourth American. The trade with America is rapidly increasing, orders being largely diverted in that direction, possibly to the extent of 50 per cent. of total.

36. LINEN AND JUTE MANUFACTURES.—No Foreign competition, with the exception of a few imports of d'oyleys and tray-cloths from Germany.

37. MACHINERY.—(*a*) *Steam engines.* (*b*) *Other sorts.*

(*a*) The trade in all classes of steam engines, such as locomotives, traction, marine, donkey, &c., is exclusively British.

(*b*) Evaporating machines for preparing fruits, &c. are practically limited to America, and England does not enter into competition in these lines. Germany takes the lead in the manufacture of mining machinery, and, as in a great many other branches of industry, she is gradually superseding Great Britain, more especially in ore-saving appliances and concentrating machinery. America does about two-thirds of the business in agricultural machinery in the Colony, the general opinion being that they are constructed very much stronger, lighter, and are more adapted for the purpose, than the machinery of any other country; this also applies to agricultural tools and implements.

TASMANIA.

39. MEDICINES AND DRUGS.—The falling off in the British export trade is due to the fact that the continental houses are addressing themselves more and more directly to the retail than the wholesale. In the matter of fine chemicals, their goods are at least 25 per cent. cheaper than the British manufactured article, and for purity they stand the severest tests, while for get-up and general appearance they are far in advance of British. As a further reason, the continental houses were at one time content to manufacture chemicals only, but now they are competing buyers in the London drug sales for original parcels and shipments, and they are satisfied to list them at a much smaller profit than the old-time conservative druggists of the United Kingdom. As a consequence a very large percentage of the trade has been diverted to the continent.

The American trade is largely due to patent and proprietary medicines, which are not to be obtained outside that country.

40. METALS.—(*a*) *Iron and old iron for re-manufacture.* (*b*) *Pig and puddled.* (*c*) *Bar, angle, bolt, and rod.* (*d*) *Railroad, all sorts.* (*e*) *Wire.* (*f*) *Hoops, sheets, and boiler plates.* (*g*) *Tinned plates.*

(*a*) to (*c*) and (*f*) to (*g*). Almost exclusively British importations.

(*d*). Belgium supplies one-tenth of the railway iron, the balance British.

(*e*). Wire. The importations to this Colony consist almost entirely of goods manufactured in Germany, America and Britain not being able to compete either in price or quality. Rabbit-proof netting is almost entirely of British manufacture.

41. MUSICAL INSTRUMENTS.—Pianos. Germany has for years past been largely and steadily increasing her sales in this market. The reason for the increase is that the foreign articles are better finished, neater in appearance, with good tone, much cheaper, and is all round a more saleable article.

Wind and string instruments of all descriptions are made much cheaper and better on the continent of Europe than in Great Britain, and the importations from foreign sources are at the least eight-tenths of the total imports, and still increasing.

42. OIL AND FLOOR CLOTH.—Exclusively British.

45. PAPER, OTHER THAN HANGINGS.—Almost every country in the world develops special requirements and peculiarities in regard (more or less) to every article consumed. Australia is no exception to this rule, and in the judgment of the trade, to supply what they believe to be needed in their local requirements, have repeatedly tried to get British manufacturers to make (even at an enhanced figure) goods that have in detail of finish varied slightly from the "orthodox" standard British article; but rarely have those efforts been attended with anything like success. Either the request has not been considered at all, or else with so little care in the execution of manufacture that the object has been over and over again defeated. With foreign houses this laxity is entirely absent, and it has often been a matter of wonder that such deviations (though on small lots) from regular makes could be made and still leave the manufacturers a profit (even after similar orders had been treated with contempt in London). The failing that has lost Great Britain much trade is doubtless the adamantine rules of old custom being inflexibly enforced, and it is obvious that, unless a very early and determined effort is made by British manufacturers, the next decade will witness far worse losses than they now even fear. For special postal reasons India developed a need for a light-weight double foolscap, and because the demand was large Great Britain consented to supply, but had the quantity been trifling it is almost certain Germany would have had the trade to herself. As with countries so it is with provinces, who may need one class of stuff in one direction, but in another some other product may be required in small quantities, and so far these trifles have been nursed in foreign countries. To carry this argument to its logical conclusion one has only to remember that not alone the country, the province, or the town, may require special attention at the hands of the British manufacturer, but even one particular buyer or one individual, and (may be) whimsical consumer, who is prepared to order and to pay for special attention. It is quite impossible to say which "departure" from the "standard" may survive and supervene, but it is apparent that the "manufacturer," who has so far left the beaten track to please and conciliate his customers in small things, will almost inevitably control a large development, should such arise. It is a desire to meet the multifarious requirements of buyers that will "hold trade," and if British manufacturers would hold what they have of connection, they must give good evidence by nursing carefully the 'infant changing" trade that is eventually to become supreme.

The continental trade in this article must have trebled during the last decade.

54. SILK MANUFACTURES.—(*a*) *Broad-piece goods.* (*b*) *Other kinds.*

(*a*) Silk piece goods, ribbons, &c., are chiefly goods of French manufacture, though a few of the plain cheaps are obtained from China and Japan.

(*b*) The bulk of the ties and scarves are manufactured in England from imported materials, whilst fully two-thirds of the silk handkerchief trade is done with China and Japan.

58. STATIONERY OTHER THAN PAPER.—British manufacturers have a decided lead in this line, and supply our market entirely, with the exception of a few insignificant articles, such as playing-cards, games, &c. In playing-cards British goods are giving place to Belgian and American makes, both of which are cheaper and better than the British.

67. WOOLLEN AND WORSTED MANUFACTURES.—*Woollen tissues. Heavy broad, all wool; heavy broad, mixed; heavy narrow, all wool; heavy narrow, mixed. Light broad, all wool; light broad, mixed.* (*a*) *Worsted coatings.* (*b*) *Broad, all wool; broad mixed. Worsted coatings. Narrow, all wool; narrow, mixed.* (*c*) *Flannels.* (*d*) *Blankets.* (*e*) *Worsted stuffs; worsted, all wool; worsted, mixed.* (*f*) *Carpets and druggets.* (*g*) *All other sorts.*

It is impossible to give a digest of these lines under separate headings, but the opinion of the leading woollen buyers is that in sections (*a*) and (*b*) the finer class of coatings and light summer worsteds are to be bought in Germany and France to greater advantage than they can be got in Britain, in that the designs are more artistic and neater, the quality and texture much finer, and the wear quite equal to the British article; but in the rough tweeds such as the West of England, Yorkshires, Bannockburns, &c. the English market is the only place where you can get bedrock value.

(*c*) Almost exclusively British.
(*d*) Ditto.
(*e*) Included in sections (*a*) and (*b*).
(*f*) There is no foreign competition either in carpets or
(*g*) Druggets, the imports being all British.

TOTAL VALUE IMPORTS.

	£	s.	d.
1884	1,656,117	10	0
1889	1,611,035	7	2
1895	1,094,456	12	9

No direct foreign importations, except timber from the Baltic.

CLASSIFICATION and RETURN showing EXPORTS of the MANUFACTURES and PRODUCTS of TASMANIA for Twelve Months ending 31st December 1895.

Classification.	Articles.	Quantity.	Value.	Remarks.
			£	
Art and mechanic productions:	*Leather	378,949 lbs.	11,156	Shipped regularly to London. This product is largely utilised locally, only the lighter hides being exported.
Textile fabrics and dress.	Fabrics, cotton, wool, silk.	386 packages	4,633	
Food, drinks, &c.: Animal food	Bacon and hams	2,754 lbs.	69	We do not produce, but could do so, for export to United Kingdom on a preferential duty of 2d. per lb.
	*Butter	304,249 lbs.	12,518	Shipped to London during season; the quality finds it a market in United Kingdom; any duty would be disadvantageous to commerce, and, possibly, hurtful to producer here, as price would reduce consumption.
	Cheese	1,290 lbs.	27	
Vegetable food	*Honey	360 lbs.	6	Trial shipment to London. Is one of the small wares our country folk might ship at a preferential duty of 2*d.* per lb.

* These items are the articles that are being shipped to London.

TASMANIA.

Classification.	Articles.	Quantity.	Value.	Remarks.
			£	
Food, drinks, &c. Vegetable food—*cont.*	*Fruit—Green	565,160 bush.	130,313	Shipped to London and other places during season. The difficulty is neither Free Trade nor Protection, but how to place grower nearer to consumer. At 2*s.* per bushel in the orchards, we can supply a million bushels in March, April, May, and June. The satisfactory development of the trade is retarded by the Hebrew fraternity which controls the trade.
	Jam	964,423 lbs.	16,702	——
	*Pulp	10,246 packages	12,658	Shipped to London and other places during season.
	Preserved	2,664 packages	1,791	——
	Grain—Barley	21,798 bush.	1,932	Grain cannot be produced in Tasmania to compete in United Kingdom against wheat grown elsewhere, unless at prices, in Liverpool, of about 30*s.* per quarter.
	Oats	341,727½ bush.	25,757	
	Rye	20 bush.	4	
	Wheat	45 bush.	9	
	Turnips	817½ tons	1,117	——
	Onions	7½ tons	28	——
	Peas and beans	49,036 bush.	5,065	——
	Potatoes	48,067¾ tons	70,786	The freight is prohibitive, and, unless ripe, carriage in good condition very doubtful.
	Vegetables	119 packages	23	——
	Tares	287 bush.	68	——
Drinks, &c.	*Hops	574,243 lbs.	18,210	Small quantity to London. Supply of Kent for United Kingdom sufficient without ours. Bavarians may partly supply you, and possibly a differential duty in favour of Australia may assist product here.
	Cider	10 gallons	1	——
Animal and vegetable substances: Animal	*Ambergris	4 packages	1,100	Shipped to London.
	*Beeswax	2,998 lbs.	178	Ditto
	*Bones, Hoofs, and Horns.	29 packages	248	Ditto
	*Hair	3,584 lbs.	124	Ditto
	*Hides and skins	215,473 No.	23,661	Shipped regularly to London, chiefly sheep-skins, are already well placed in London.
	*Native skins	216,130 No.	7,365	Shipped regularly to London.
	*Rabbit skins	3,377,654 No.	15,499	Ditto
	*Tallow	175 tons	2,968	Ditto
	*Wool	7,223,219 lbs.	202,341	Ditto
	*Glue	8,960 lbs.	50	Ditto
	*Rugs	4 packages	174	Ditto
Vegetable	*Bark	6,167 tons	33,753	Shipped regularly to London.
	*Gum	10 gallons	20	——
	Hay and straw	8,109½ tons	16,252	——
	Seeds, plants, and trees.	2,944 packages	1,911	——
	Timber—			
	Blackwood	422,058 sup. ft.	2,182	The efforts being made to secure part of the United Kingdom demand will succeed eventually, but our timber cannot shut out Baltic and Oregon even with preferential rate of duty.
	Ditto logs	150,518 sup. ft.	439	
	Pine logs	31,695 sup. ft.	62	
	Laths, shingles	63,300 No.	28	
	Sassafras logs	21,544 sup. ft.	54	
	Palings	1,127,815 No.	3,774	
	Myrtle logs	7,280 sup. ft.	20	——
	Posts and rails	15,183 No.	180	——
	†Sawn	6,509,762 sup. ft.	17,960	Shipments to London and Marseilles for paving purposes.†
	Shaped pieces	38,222 No.	1,466	——
	Treenails and staves.	1,245,290 No.	5,207	
	Willows	105 packages.	1,313	——

* These items are the articles that are being shipped to London.

† Timber for paving purposes has been shipped to London and Marseilles: the supply of suitable timber in Tasmania being inexhaustible, orders to any extent could be executed.

Classification.	Articles.	Quantity.	Value.	Remarks.
			£	
Oils - -	*Oils, various -	66 tuns	5	——
	*Oil, Sperm -	241¾ tuns	6,552	Shipped to London and other places.
	*Oil, Eucalyptus -	257 packages	2,096	
Live stock - -	Horses - -	48 No.	2,287	——
	Sheep - -	4,113 No.	15,130	——
	Poultry - -	15 No.	66	——

* These items are the articles that are being shipped to London.

NEW ZEALAND.

No. 28.

GOVERNOR THE EARL OF GLASGOW to MR. CHAMBERLAIN.

(Received February 25, 1897.)

SIR, Christchurch, January 20, 1897.

WITH reference to your Despatch dated 28th November 1895, I have the honour to enclose herewith, at the request of my Government, four copies of Returns, compiled on the trade of this Colony with the United Kingdom.

I have, &c.,
GLASGOW.

Enclosure in No. 28.

REPORT.

Department of Trade and Customs,
Wellington, New Zealand, December 22, 1896.

The Chambers of Commerce throughout the Colony were requested to furnish the Government with such details as would enable a full report to be made on the subject matter of the despatch of the Right Honourable the Secretary of State for the Colonies, dated the 28th November 1895. A copy of the despatch, together with the annexes thereto, was forwarded to each chamber.

Replies have been received from the Chambers of Commerce at Christchurch, Dunedin, Auckland, Wellington, Napier, Invercargill, and Wanganui. That from Christchurch contained the fullest information, and has been made the basis of the report now furnished; particulars from the other replies on points not touched on in the reply from Christchurch being also embodied in the report.

Before entering upon the detailed report under each heading in the return, the following general observations are necessary:—

The total value of importations from foreign countries, as compared with the value of importations from British possessions, is as follows:—

	£
In 1894—From British possessions - - -	7,009,541
„ Foreign Countries - - -	654,347
Total - - - -	7,663,888
In 1889—From British possessions - - -	5,729,479
„ Foreign countries - - -	567,618
Total - - -	6,297,097
In 1894—From British possessions - - -	6,183,630
„ Foreign countries - - -	604,390
Total - - - -	6,788,020

NEW ZEALAND.

The proportion of the importation from foreign countries to the total importation being—

In 1884	8	per cent.
1889	9	„
1894	8·9	„

This percentage is based merely on the statistics of trade as compiled from merchants' entries, and although great care is taken to ensure that all goods arriving on through bills of lading or transhipped either in London or Australia are entered as imports from the countries of original shipment, there is necessarily a large proportion of foreign goods shipped out of stock held in the United Kingdom, Australia, or other British possessions, the origin of which to the country of production could not be traced; consequently the figures are, to a large extent, misleading as to the true facts of the case. The general assumption is that the facts are very much more in favour of foreign trade than the figures show; but to what extent this is the case it is impossible to estimate.

Taking the figures relating only to the articles referred to in paragraph 3 (*a*) of the despatch, the percentage of value of goods from foreign countries, as compared with the total trade under those headings, is as follows:—

1884	8·77
1889	13·46
1894	14·68

Of late years the development of direct trade with Germany and France has been facilitated by the establishment of the subsidized lines of steamers between those countries and Australia. The trade of New Zealand is, however, not as yet large enough for full advantage of this to be taken so as to enable orders on a large scale to be sent direct to those countries, and consequently, supplies of foreign goods are, to a large extent, derived from stocks held in the Australian Colonies by agents of German or French firms.

Notwithstanding the San Francisco subsidized mail-service, nearly the whole of the direct imports from United States and Canada still come from New York by sailing vessels. It is as yet too early to form any opinion as to how far the new Vancouver service, when extended to New Zealand, will affect the course of trade from Canada.

The Government of Japan has established a subsidized line of steamers between Japan and Australia, and that country will, no doubt, soon become an important factor in the commerce of the southern hemisphere. Up to the present time, however, importations from Japan to this Colony have been insignificant.

The information received from the Chambers of Commerce does not disclose one detail asked for in the despatch, namely, the price of the foreign article as compared with the British. This has, no doubt, arisen from the fact that it is extremely difficult to state prices which would not be misleading, owing to the various conditions which govern prices. Large wholesale buyers, who receive shipments direct from manufacturers, and sell to retailers, would buy at a price different from that of an importer who imports on a small scale. In certain lines of goods, especially those of foreign manufacture, there are few importers who confine themselves strictly to the wholesale trade.

During the last 10 years a number of German firms have sent out representatives to the Colony as resident agents. These agents are indefatigable in pushing business, hold no stocks, sell from samples, travel throughout the Colony taking orders from both wholesail and retail traders, to whom credit is given, and furnish minute information to their principals with reference to the special requirements of the Colony.

Chambers of Commerce have been invited to furnish the information asked for in paragraph seven of the despatch, with reference to products which might be advantageously exported to the United Kingdom or other parts of the British Empire, but do not at present find a sufficient market there. They have not as yet responded to this invitation, some of them stating that they are awaiting the fuller despatch referred to in the paragraph.

The Trades Mark Act of this Colony is based on the lines of the Imperial Act; but very few instances of foreign goods being put forward under the pretence of British manufacture have been brought under notice. The following have been detected, principally through the vigilence of custom officers, and not through the information given by traders; German spirits, purporting to be Cognac of a French brand, and in one instance labelled as "O'Rafferty's Balmoral Whiskey"; watches, made in Switzerland, with English names on them; tooth-brushes, made in Japan, and marked "Made in London." The enforcement of this Act is, however, attended with considerable difficulties in the Colonies.

R. J. SEDDON,
Commissioner of Trade and Customs.

Return showing Value of Articles Imported into New Zealand, the Value of which Imported from Foreign Countries exceeds 5 per cent. of the Total Value Imported. (*See* Despatch from the Secretary of State for the Colonies, dated 28th November 1895.)

No.	Commodity.	1884.			1889.			1894.		
		Total Value of Importation.	Value of Importation from Foreign Countries.		Total Value of Importation.	Value of Importation from Foreign Countries.		Total Value of Importation.	Value of Importation from Foreign Countries.	
			Countries.	Value.		Countries.	Value.		Countries.	Value.
		£		£	£		£	£		£
2	Animals, horses	2,195	Nil	—	2,345	Nil	—	20,704	United States	1,550
4	Arms and Ammunition :—									
	(*a*) Fire-arms	8,744	United States	134	7,249	Germany	188	10,460	France	89
						Belgium	164		Germany	674
						United States	94		Belgium	951
						China	5		United States	594
						Total	451		Total	2,198
	(*c*) Other kinds	31,905	United States	37	55,870	Belgium	10	36,195	Belgium	19
						United States	152		United States	2,010
									South Sea Islands	3
						Total	162		Total	2,032
18	Clocks and watches	41,167	United States	2,984	21,676	France	217	22,033	France	3
						Germany	39		Germany	276
						Switzerland	7		Belgium	94
						United States	3,656		United States	4,756
						Total	3,919		Total	5,129
20	Cordage and twine	37,670	United States	5,692	20,478	United States	1,085	16,418	Italy	3
									Germany	52
									United States	643
									Total	698
25*	Fish :—									
	(*a*) Dried, pickled, and salted.	8,613	United States	710	3,857	United States	186	4,091	Italy	1
			South Sea Islands	70		China	324		United States	375
									China	30
			Total	780		Total	510		Total	406

* No separate heading is made for herrings.

No.	Commodity.	1884.			1889.			1894.		
		Total Value of Importation.	Value of Importation from Foreign Countries.		Total Value of Importation.	Value of Importation from Foreign Countries.		Total Value of Importation.	Value of Importation from Foreign Countries.	
			Countries.	Value.		Countries.	Value.		Countries.	Value.
	*Fish :—*cont.*	£		£	£		£	£		£
	(*b*) Potted and preserved -	42,473	China - - -	224	17,495	Norway - - -	8	23,178	Portugal - - -	128
			United States - -	18,339		United States - - -	8,762		Italy - - -	17
						China - - -	12		Norway - - -	25
						South Sea Islands - -	4		United States - -	5,950
									China - - -	6
									South Sea Islands - -	2
			Total - -	18,563		Total - -	8,786		Total - -	6,128
26	Furniture, upholstery, and cabinetware.	48,079	France - - -	35	18,159	Spain - - -	2	27,649	Austria - - -	252
			Austria - - -	8		Portugal - - -	2		Germany - - -	1,995
			United States - -	6,364		Italy - - -	82		Belgium - - -	71
						Germany - - -	554		United States - -	6,608
						United States - -	3,476		China - - -	25
						China - - -	156		Japan - - -	649
						Japan - - -	252		Java - - - -	85
			Total - -	6,407		Total - -	4,524		Total - -	9,685
27	Glass :—									
	(*b*) Window - -	14,204	Nil - - -	—	8,708	Belgium - - -	188	8,495	Germany - - -	215
									Belgium - - -	642
									United States - -	18
									Total - -	875
	(*c*) Common bottles - -	7,020	United States - -	88	10,008	United States - -	285	15,911	Germany - - -	37
						South Sea Islands - -	35		United States - -	1,107
						Total - -	320		Total - -	1,144
	(*d*) Other kinds - -	13,271	United States - - -	644	15,129	Germany - - -	50	19,674	Austria - - -	1
			Germany - - -	6		Belgium - - -	13		Germany - - -	584
						United States - -	898		Belgium - - -	453
									Holland - - -	9
									United States - -	1,764
									South Sea Islands - -	1
			Total - -	650		Total - -	961		Total - -	2,812

28	Grease, tallow, and animal fat	670	United States	80	994	United States	130	1,443	United States	539
30	Hardware and cutlery	192,074	Germany	134	149,653	France	8	171,393	France	58
			United States	15,339		Italy	3		Germany	1,504
			South Sea Islands	15		Germany	328		Belgium	953
						Belgium	5		United States	16,058
						United States	13,449		South Sea Islands	1
						China	3			
						South Sea Islands	15			
			Total	15,488		Total	13,811		Total	17,874
32	Implements and tools of industry	59,189	Germany	15	56,409	Germany	80	57,995	Austria	3
			United States	14,631		United States	17,770		Germany	610
						South Sea Islands	4		Belgium	15
									United States	21,080
			Total	14,646		Total	17,854		Total	21,708
33	Instruments and apparatus—surgical, anatomical, and scientific	13,577	United States	362	8,545	France	59	8,215	France	5
						Germany	114		Austria	34
						United States	404		Germany	646
						South Sea Islands	5		Belgium	3
									Holland	2
									United States	494
									South Sea Islands	33
						Total	582		Total	1,217
34	Leather :—									
	(*a*) Unwrought	75,223	United States	4,501	52,841	France	102	66,112	France	18
						Germany	258		Germany	1,740
						Belgium	51		Belgium	172
						United States	6,293		Holland	34
									United States	5,834
						Total	6,704		Total	7,798
	(*b*) Wrought, boots, and shoes	143,840	United States	962	117,904	France	2	189,455	France	38
			Germany	40		Austria	866		Spain	6
						Germany	2,676		Austria	257
						United States	2,807		Germany	273
						China	85		United States	3,536
						South Sea Islands	6		China	8
			Total	1,002		Total	5,942		Total	4,113

* No separate heading is made for herrings.

No.	Commodity.	1884.			1889.			1894.		
		Total Value of Importation.	Value of Information from Foreign Countries.		Total Value of Importation.	Value of Importation from Foreign Countries.		Total Value of Importation.	Value of Importation from Foreign Countries.	
			Countries.	Value.		Countries.	Value.		Countries.	Value.
		£		£	£		£	£		£
	Leather:—*cont.*									
	(*d*) Saddlery and harness	32,204	United States	1,571	19,021	United States	830	22,159	Germany	33
									United States	2,121
									Total	2,154
37	Machinery:									
	(*b*) Other kinds	222,369	United States	48,123	202,433	United States	68,256	172,172	United States	33,510
						Germany	310		Germany	6,566
						South Sea Islands	13		Belgium	1,803
									Sweden	3,557
						Total	68,579		Total	45,436
38	Manure	37,847	United States	637	37,404	South Sea Islands	6,482	57,943	Germany	480
			South Sea Islands	7,906					United States	630
									South Sea Islands	14,983
			Total	8,543					Total	16,093
	Matches and vestas	24,685		—	24,476	Germany	3	31,251	France	90
						China	6		Italy	100
									Germany	595
									Sweden	209
									Belgium	2,004
									United States	84
									Japan	77
						Total	9		Total	4,059
	Medicines	—	(Not specified)	—	31,111	Germany	7	32,943	France	6
						United States	5,246		United States	7,639
						China	51		China	1
						Total	5,304		Total	7,646

40	Metals: (a) Iron— (b) Wire	77,912	United States	14,932	84,448	United States	8,885	75,820	Germany	965
									Belgium	2,899
									Holland	638
									United States	3,368
									Total	7,870
	(c) Zinc, wrought, and unwrought.	5,207	United States	23	5,968	United States	35	8,927	Germany	98
									Belgium	408
									United States	10
									Total	506
41	Musical instruments	47,644	United States	1,480	54,246	France	37	49,410	France	3
			Germany	923		Germany	3,114		Germany	20,285
			South Sea Islands	5		United States	2,251		Switzerland	10
						China	9		Belgium	182
						South Sea Islands	4		United States	4,252
									South Sea Islands	2
			Total	2,408		Total	5,415		Total	24,734
45	Paper, other than hangings	103,053	Germany	289	92,808	Germany	70	100,127	Russia	645
			Belgium	14		United States	1,176		Germany	1,171
			United States	177		China	11		France	91
			China	35		South Sea Islands	5		Sweden	630
									Belgium	89
									Holland	98
									United States	17,845
									South Sea Islands	12
			Total	515		Total	1,262		Total	20,581
47	Pictures (paintings and engravings).	6,537	Germany	213	4,333	Italy	44	6,313	France	2
			United States	30		Germany	57		Spain	227
			China	13		United States	168		Italy	3
						South Sea Islands	22		Switzerland	22
									Germany	124
									United States	333
			Total	256		Total	291		Total	711
48	Plate and plated ware	20,133	United States	1,983	16,868	Germany	92	17,402	Germany	144
						United States	820		United States	1,269
									Japan	2
						Total	912		Total	1,415

No.	Commodity.	1884.			1889.			1894.		
		Total Value of Importation.	Value of Importation from Foreign Countries.		Total Value of Importation.	Value of Importation from Foreign Countries.		Total Value of Importation.	Value of Importation from Foreign Countries.	
			Countries.	Value.		Countries.	Value.		Countries.	Value.
		£		£	£		£	£		£
52	Seeds of all sorts	88,475	Germany	292	79,167	France	65	70,484	France	64
			United States	3,121		Italy	11		Italy	193
			South Sea Islands	606		Germany	3,647		Germany	1,344
						United States	8,830		Belgium	254
									Holland	220
									United States	7,460
									South Sea Islands	35
			Total	4,019		Tota	12,553		Total	9,570
56	Soap	5,532	United States	131	5,916	France	7	9,246	Germany	69
						Germany	171		United States	1,167
						United States	61			
						Total	239		Total	1,227
57	Spirits	232,836	France	10,289	182,740	France	4,899	153,560	France	7,965
			Germany	948		Germany	428		Italy	35
			Belgium	109		Holland	380		Germany	2,852
			Holland	2,106		United States	5,453		Belgium	719
			United States	12,649		China	121		Holland	3,003
			China	250		South Sea Islands	7		United States	4,058
									China	45
									South Sea Islands	6
			Total	26,360		Total	11,288		Total	18,183
58	Stationery, other than paper	87,901	United States	1,149	66,219	Italy	4	71,524	Spain	2
			Germany	17		Austria	17		Switzerland	84
						Germany	342		Germany	505
						Belgium	23		Belgium	40
						Holland	2		Holland	30
						United States	1,353		United States	3,222
						China	22		Japan	46
						Japan	2			
			Total	1,166		Total	1,765		Total	4,229

59	Stones and slates	2,130	United States	1,264	2,966	United States	748	1,112	United States	875
61	Sugar, refined	504,567	United States	1,481	227,182	France	32	243,745	Germany	1,598
			China	7,516		United States	87		United States	4
			South Sea Islands	6		China	30,083		China	600
									Japan	276
			Total	9,003		Total	30,202		Total	2,478
64	Wood and timber, manufactured	8,660	United States	5,466						
	Staves and empty casks, and unenumerated.	—		—	11,786	United States	7,570	12,414	Germany	69
						China	3		Belgium	2
						South Sea Islands	12		United States	8,901
									Egypt	10
						Total	7,585		Total	8,982

NEW ZEALAND.

TABLE showing TOTAL IMPORTS into NEW ZEALAND from BRITISH POSSESSIONS and from FOREIGN COUNTRIES during the Years 1884, 1889, and 1894.

Whence Imported.	1884.		1889.		1894.	
	£	£	£	£	£	£
British Possessions	—	7,009,541	—	5,729,479	—	6,183,630
Foreign Countries—						
France	12,842		7,231		18,898	
Spain	482		800		1,867	
Portugal	1,759		350		1,100	
Italy	154		346		2,937	
Austria	8		483		597	
Switzerland	—		1,502		4,010	
Greece	711		866		966	
Russia	—		—		645	
Germany	6,547		18,964		68,163	
Sweden	—		—		4,400	
Belgium	973		2,420		17,743	
Holland	2,222		533		6,072	
United States	348,557		342,436		394,691	
West Indies	—		—		857	
Egypt	241		1,980		1,453	
Canary Islands	—		—		1,133	
China	67,736		88,233		5,656	
Japan	19,393		8,297		17,526	
Philippine Islands	1,471		19,239		5,450	
Asia Minor	—		1,110		2,558	
Java	138,899		44,026		85	
Pacific Islands	57,428		26,213		52,197	
Whale Fisheries	3,763		2,486		—	
Other Countries	161		13		386	
		654,347		567,618		604,390
TOTAL IMPORTS	—	7,663,888	—	6,297,097	—	6,788,020

Department of Trade and Customs,
Wellington, 6th March 1896.

W. T. GLASGOW,
Secretary and Inspector.

Detailed REPORT under the HEADINGS in ANNEXE I. of DESPATCH.

NOTE.—The Articles marked (*) are not reported on because the importation of foreign goods is under the limit specified in paragraph 3 (*a*) of the Despatch.

1. ALKALI.*

2. ANIMALS, HORSES.—The horses from the United States in 1894 were 11 trotting horses, value at 1,550*l.*; in 1889 the larger proportion of the total value of 20,704*l.* represented horses from New South Wales, which were of Colonial production.

3. APPAREL AND SLOPS.*

4. (*a*) *Firearms.*—A few rifles and revolvers, but no shot-guns, are imported from America. Germany and Belgium both send a large number of shot-guns annually, the prices being much lower and the guns finished equal to the cheaper lines manufactured in England. They meet with a ready sale, and give general satisfaction wherever sold.

(*b*) *Gunpowder.*—All gunpowder and caps imported are of English manufacture, neither Germany nor America can supply goods of the same quality at English prices.

(*c*) *Shot* is now manufactured in the Colony at a price which undersells that of the imported article.

Cartridges.—During the last few years large quantities of the cheaper lines have been received from America at 25 per cent. lower than the price of English makes. They give good satisfaction, but since English makers have reduced their prices they will have no difficulty in doing the trade.

5. BAGS, EMPTY.*

6. BEER AND ALE.*

7. BISCUITS AND BREAD.*

8. BLEACHING MATERIAL.*

9. BOOKS, PRINTED.*

10. BUTTER.*

11. CANDLES.*

12. CAOUTCHOUC, MANUFACTURES OF.*

13. CARRIAGES AND WAGGONS, RAILWAY.*

14. CEMENT.*

15. CHEESE.*

16. CHEMICAL PRODUCTS AND DYE-STUFFS.*

17. CLAY, MANUFACTURED.*

18. CLOCKS AND WATCHES.—The increase in imports from foreign countries is not very great, and is almost entirely accounted for by the increased demand for cheap watches and clocks, in which class of goods the Americans have long excelled. In the better qualities English makers maintain their ground.

19. COALS.*

20. CORDAGE AND TWINE.—Nearly the whole importation is from England. The principal exception is white cotton sash-cord, which comes from America, and is far superior to what can be procured from England at anything near the same price.

21. CORN.*

22. COTTON YARNS.*

23. COTTON MANUFACTURES.*

24. EARTHEN AND CHINA WARE.*

25. (*a*) *Fish, dried, pickled, and salted.*—The principal imports from the United States consist of pickled salmon and dried cod-fish.

(*b*) *Fish, potted and preserved.*—The principal importation from the United States consists of tinned salmon, lobsters, and oysters.

NEW ZEALAND.

26. FURNITURE.—Importations from foreign countries consist almost entirely of chairs from the United States and from Austria, principally from the former country. These chairs are better made, better packed, and are better value than those of English make. They are lighter and more suited to the requirements of the Colony.

27. (*a*) *Glass.*—Plate, rough, or silvered.*

(*b*) *Flint, window glass.*—Although the figures for 1894 show only 857*l.* from Germany and Belgium, while the total importation amounts to 8,495*l.*, it is almost certain that three-fourths of the window glass imported from the United Kingdom is manufactured in Belgium. Practically only Belgian window glass is used in this Colony. This is attributable to the low price of the third quality Belgian glass, which is principally in use, and the equivalent is not produced by English manufacturers.

(*c*) *Common bottles.*—All common soda-water and ginger-beer bottles are still imported from England. The ordinary cheap medicine bottles have always been got from Germany, as they can be obtained at a much lower cost there. The German bottles are lighter, but they answer the purpose just as well as the heavier English goods. Other dispensing bottles and those kinds used for bottling essences, &c., have been coming in increased quantities from the United States. This is owing mostly to the fact that American manufacturers push their goods vigorously and systematically by the aid of agents or travellers, who regularly submit samples to the trade to choose from, whilst English makers utterly neglect this means of putting their wares before importers.

(*d*) *Other kinds.*—The increase shown in foreign imports consists of the *lower* quality of goods, in which class the Belgians, Germans, and Americans are so much ahead of English makers. The Americans turn out their moulded glassware so light, and of such good colour, and of such taking designs as to present the appearance of being cut glass. The English makes are heavier, and of old designs, and much higher in price. The Americans too are more enterprising in constantly bringing out new shapes and designs, and place these before their customers by new illustrated catalogues, which they supply to tradespeople at regular and short intervals.

28. GREASE, TALLOW, AND ANIMAL FAT.—Tallow and fat are not imported. Axle grease is obtained from England in kegs. A small quantity of grease is imported from the United States in attractive looking tins.

29. HABERDASHERY AND MILLINERY.*

30. HARDWARE.—(*a*) *Files*: Very few come from Germany. America has supplied a small quantity; these are lower in price and lighter in material than the English.

(*b*) *Saws*: Most of the saws sold in New Zealand are of American manufacture. Some 20 years ago, England had the monopoly of this line, but the American manufacturers sent travellers round to see what was required of them, and made the goods at about 20 per cent. less than the English article. The American saw is preferred because it is lighter and more easily handled; some English makers are now supplying saws of the American style. France supplies most of a very limited demand for handsaws, Germany coming next with a very inferior quality made of hoop-iron.

(*c*) *Edge-tools.*—America supplies the whole of the axes now imported; the American axes are lighter and better finished than the English article, besides being considerably cheaper; they are in every way superior, both as regards looks and use.

Hammers.—This line seems to belong exclusively to the Americans, who turn out a nice light, strong, and well finished carpenters' hammer, considerably less in price than any hammer made in England. Nearly the whole of the engineers' and blacksmiths' hammers come from England.

(*d*) *Engineers' small tools.*—Such tools as stocks and dies, gimblet-bits, pliers, callipers, nippers, and small steel toys, come mostly from Germany; the goods are well finished and put into attractive-looking parcels; they sell readily, and are at least 30 per cent. cheaper than the English make.

(*e*) *Holloware.*—In this line England stands out prominently, in fact no other country can compete with her in quality and price; a good deal of cheap enamelled stamped holloware is, however, now coming from Germany, and being low in price, is supplanting the better class of British goods.

Brass foundry, chandeliers, bedsteads, needles, fish-hooks, pens, chains, screws, and tinware are all imported from England, although America is making a bid for brass foundry and tinware, on both of which lines they show good value.

Bicycles.—England has supplied the bulk of these goods, but America is now sending, *viâ* San Francisco, considerable shipments at lower prices.

Nails.—Nearly the whole importation of wire nails is of German or Belgian origin; they are much lower in price than English, and equal in quality; heavy nails, spikes, &c., are mostly imported from England.

Horse-nails.—The importation is equally divided between England, America, and Germany. One importer states as follows:—"Some years ago we were getting our "nails from England, but, on opening a case one day, found a German circular inside "quoting a price so much less that we felt compelled to send an order; we did so and "have never regretted it, as they have given every satisfaction, and are low in cost; "we are, however, trying at present to work an English brand at the same price."

Cutlery.—Germany supplies a considerable quantity of the cheaper lines of scissors and pocket-knives. The Germans finish their cheap lines much better than the English and supply them at a far less cost; Germany sends little table cutlery; no pocket-cutlery comes from America.

Sundries.—Nearly the whole importation of the following goods is from America, the goods are cheaper and better finished, and in consequence are much easier to sell. Malleable castings for coachbuilders, cart-door locks, gate hinges, portable cooking stoves, wringers, pumps, rams, buggy-axles, drilling- and boring-machines, finishing-nails, sad-irons, and sundry novelties.

31. HATS.*

32. IMPLEMENTS AND TOOLS OF INDUSTRY.—Nearly all the imports under this heading are reapers and binders, lawn mowers, mowers, seed-drills, from America. The English manufacturers do not make their goods light enough, nor can they supply at anything near the prices quoted by Americans. The excessive cost of the English implements is probably caused by the difference in their construction, and the weight put into the implements so far from being an advantage is, in the eyes of farmers and those who use implements, a positive disadvantage. The American implements score both ways, both as to their actual usefulness and in the matter of price. The Americans supply most of hay-, manure-, and sluice-forks, long-handled shovels, and picks; but spades come mostly from the United Kingdom, as the American spades do not suit the market so well. Short-handled shovels and coal shovels of British make are preferred. The American goods are more pleasing to the eye, paint being used freely, which makes them more showy. An experienced retailer says that, "in the eye of the customer this frequently decides the purchase." Of course American goods have merits beyond the mere "get-up" of an article, but in addition money is spent on appearance and this has a good effect when selling.

33. INSTRUMENTS AND APPARATUS, SURGICAL, ANATOMICAL, AND SCIENTIFIC.—German instruments are vastly superior to English, and are much lower in cost. German india-rubber goods are inferior to English, and lower in cost. American are quite equal to English and somewhat lower in price.

34. LEATHER.—(*a*) *Unwrought.*—The increase shown in foreign imports between 1884 and 1894 is fallacious. Of late years the foreign goods have been reaching the colony more in direct shipments from continental and American ports than formerly. Importers are of opinion that there has not been any increase of late in the imports of foreign made leather.

(*b*) *Wrought, Boots and Shoes.*—The increase shown in this class of goods by foreign makers is due to the great strides made of late by American manufacturers, who are now copying English styles, and at the same time turning out their goods with better finish and at very much lower cost than similar English goods. The Americans are now paying special attention to *pump* goods, which they are producing in such good style and at such low prices as to oust the German makers, who until lately, had nearly the whole of this particular line of trade in New Zealand. Another explanation of the increase of American imports is that during the late strikes in the boot trade in England, importers in the colony could not get there orders executed up to time, and had to look to America for supplies, thus permanently transferring a part of the trade to that country.

(*c*) *Saddlery and Harness.*—The increase shown in American imports between 1889 and 1894 is due to the greater demand for sulky harness (for trotting), English goods of this class being too heavy and much dearer.

37. MACHINERY.—The bulk of the machinery from America consist of locomotives and freezing-machines. Nearly all ordinary steam-engines come from the United Kingdom. The imports from Germany consist principally of sewing-machines, while those from Sweden will be nearly all De Laval's and other Swedish makers' cream separators and

NEW ZEALAND.

dairy-machinery. Sweden has developed this particular branch of industry to a very high extent.

Americans are making some very cheap gas- and oil-engines for stationary and marine work; but the material and workmanship are said to be inferior to those of English make.

In water-wheels and motors the French and Germans have the trade. It is said that British makers cannot compete with them.

German manufactures are now sending out beautifully illustrated catalogues of various classes of machinery, and it is expected that there will be more competition from Germany.

38. MANURES.—As far as can be ascertained, manures from Germany mainly consist of kainite, a native deposit of potash, valuable as supplying potash and also alkaline salts to the land. Basic slag is also imported from Germany; but it is believed that the bulk of this article comes from British iron-works.

Manures from the United States consist, as far as can be discovered, of superphosphates made from the coprolite deposits of Florida. The importations are, however, small, and the superphosphates of English make will be able to displace them.

Large quantities of guano are imported from the South Sea Islands, mostly British possessions.

The extension of freezing and boiling down industries will, to a large extent, diminish the quantities of imported manures; but the absence of any deposit in New Zealand of coprolite (or phosphate rock) will always necessitate the importation of guanos or other manures yielding phosphates.

39. MEDICINES.—The bulk of the medicines imported from America are patent medicines, which are very largely advertised, and the sale is probably due as much to that as to any other cause.

40. METALS—

(*a*) *Iron or Steel.**

*a. Old for Re-manufacture.**

b. Pig or Puddled.

c. Bar, Angle, Bolt, and Rod.—Bar iron of good quality can be bought cheaper in Belgium and Germany than in England, but it is kept out of the market owing to the sizes not matching English makes. This is the only reason which prevents it obtaining a strong hold on this market. Several shipments were tried, and importations given up solely on account of disputes about the size of bars. In girders, the demand is for English, at higher prices than foreign; still a good deal of Belgian make is imported.

d. Railroad, of all sorts.—Belgium and Germany have the trade in tram-rails completely in their hands, and are further supported by low shipping freights by the German subsidised steamers to Sydney, also the very low railway freights in Germany.

e. Wire.—Importations of black and galvanised fencing wire are mostly from Germany and Belgium, the price being from 10*s.* to 30*s.* per ton lower than English. The Americans have of late years obtained the bulk of the trade in galvanised barbed wire.

f. Hoops, Sheets, and Boiler Plates.—Sheet iron and plates are often supplied from Belgium, being equal to English, and about 20*s.* per ton less.

*g. Tin Plates.**

*h. Cast and Wrought Iron.**

*i. Steel, unwrought.**

k. Manufactures of Steel.—cannot report on this—too vague.

(*b*) *Copper.**

(*c*) *Brass of all sorts.**

(*d*) *Lead.**

(*e*) *Tin, unwrought.**

(*f*) *Zinc sheets.*—The whole of this line comes from Germany or Belgium, being the nearest place from which to get the spelter.

41. MUSICAL ISTRUMENTS.—More than half of the pianos imported are of German manufacture; they are not considered so good as those of English make, but they are showy and much cheaper; it is said that English makers charge too much for their name. Organs come principally from the United States and Canada.

42. OIL AND FLOOR-CLOTH.*

43. OIL, SEED.*

44. PAINTERS' COLOURS AND MATERIALS.*

45. PAPER (OTHER THAN HANGINGS).—The great increase shown in foreign imports is almost entirely in American manufactures. This is due to the very cheap wood-pulp material discovered not long ago by the Americans, the enormous supply of timber in America giving facilities not existing in Great Britain for the supply of this material; the American pulp-paper is therefore sold at a much lower price than the English. One large importing firm says, however, that when inviting tenders recently from English and American manufacturers, the English makers were much nearer the price of their American competitors than formerly. In stationery paper British manufacturers still practically retain the whole of the trade.

46. PICKLES, VINEGAR, AND SAUCES.*

47. PICTURES.—Engravings are obtained from England. Pictures from the United States are lithographic copies of English paintings; such pictures cost in the United States from 1*s.* to 1*s.* 9*d.*, and the inexperienced can see no difference between them and engravings.

48. PLATE AND PLATED WARE.—Very little plated ware is imported from Germany. That which comes from America consists principally of the cheaper kinds of cruets, pickle-frames, butter-coolers, and other goods of this class. English makers are, it is said, now imitating some of the above American goods, but cannot compete in price.

49. PROVISIONS.*

50. RAGS.*

51. SALT.*

52. SEEDS OF ALL SORTS.* No report.

53. SILK, THROWN, TWIST, AND YARN.*

54. SILK MANUFACTURES.*

55. SKINS AND FURS.*

56. SOAP.—There is no common soap imported. In fancy soap the foreign imports are principally from the United States, and consist chiefly of expensive toilet kinds. The quantity is small, but the high value makes the importation look large when compared with imports from England.

57. SPIRITS.—The apparent increase of imports from France, Germany, Holland, and Belgium is owing to the fact that at one time shipments were made out of stocks held in London, but superior shipping facilities now result in a larger proportion of direct imports from these countries.

58. STATIONERY, OTHER THAN PAPER.—There is an increase in American goods, which are got up much better, finished better, and neater and cheaper than English goods. The same remarks apply to German goods.

59. STONES AND SLATES.—Cannot make any report; importation trifling.

60. GRINDSTONES.*

61. SUGAR, REFINED.—Almost all importation is now in the shape of raw sugar from British possessions, and refined in the Colony. German sugar has been imported, more in the way of experiment, and has not resulted satisfactorily. Beetroot sugar is found to arrive in a more or less sweaty condition, and shipments have been practically discontinued.

62. TELEGRAPHIC WIRE AND APPARATUS.*

63. UMBRELLAS AND PARASOLS.*

64. WOOD AND TIMBER, MANUFACTURED.—Imports consist almost entirely of staves, &c., from the United States, suitable timber not being procurable in any other country with which there are direct shipping facilities.

65. WOOL.*

66. WOOLLEN AND WORSTED YARNS.*

67. WOOLLEN AND WORSTED MANUFACTURES.*

68. YARN, ALPACA, MOHAIR, AND OTHER SORTS.*

Fiji.

FIJI.

No. 29.

Sir JOHN THURSTON to Mr. CHAMBERLAIN.

(Received August 17, 1896.)

Government House, Suva, Fiji,
July 1, 1896.

Sir,

In reply to your letter of 28th November 1895, calling for particulars regarding the securing of the mutual trade between the United Kingdom and the Colonies for British producers and manufacturers, I have the honour to enclose herewith a return of articles imported into this Colony from foreign countries during 1894, together with an explanatory report by the Collector of Customs.

2. The return and report I found waiting for me on my return to this Colony to resume the administration of the government, which will account for the delay in replying to your letter.

3. You will observe that the information contained in the return and report only refers to the year 1894; it was found impossible to compile reliable information for the years 1884 and 1889. Our present form of entries in use in this Colony does not require the insertion of the country of origin from which goods are exported to this Colony, and I would further observe that nearly all goods imported come either from New Zealand or the Australian Colonies (though from a foreign country, in some instances, in the first place). Under these circumstances the details would be tabulated in the Colonies through which they pass before reaching this Colony.

I have, &c.,
JOHN B. THURSTON.

Enclosures in No. 29.

Colony of Fiji.

Return showing Proportion of Foreign Goods Imported into Fiji for the Year 1894.

No.	Commodity.	Total Value of Importation.	Value of Importations from Foreign Countries.	
		£		£
6	Beer in bottle	2,251	Germany	576
			United States	72
			Foreign	291
	Cigars and cigarettes	666	Japan	31
			United States	210
			Foreign	175
	Cocoa	525	Foreign	96
	Drapery 3; 23; 29; 36, *a* (*a*) (*b*) (*d*) (*e*); 54, *a*, *b*; 67, *a*, *b*, *c*, *d*, *e*, *g*.	52,606	France	101
			Germany	1,910
			Japan	79
			United States	117
			Foreign	73
25	Fish	2,557	United States	220
			Foreign	121
	Fruits, dried and preserved	630	United States	211
			Foreign	79

No.	Commodity.	Total Value of Importation.	Value of Importations from Foreign Countries.	
		£		£
26	Furniture	1,762	Germany	77
			Japan	56
			United States	83
			Foreign	68
27	Glassware *a*, *c*, *d*	3,630	Germany	400
			United States	385
			Foreign	62
30	Hardware	15,808	France	9
	(*a*) Cutlery.		Germany	400
	(*b*) Axes.		United States	430
	(*c*) Spades and shovels.		Foreign	32
	(*d*) Lampware.			
37	Machinery *a*, *b*	24,855	France	32
			Germany	355
			Foreign	1,354
			United States	32
41	Musical instruments	696	Germany	46
			United States	24
			Foreign	5
43	Oils	1,960	China	2
			France	1
			United States	10
			Foreign	216
	Oils, kerosene	3,458	United States	3,458
48	Plated ware	508	United States	152
	Ship chandlery	1,641	France	45
	(*a*) Coal tar.		United States	127
	(*b*) Oars.		Foreign	1
57	Spirits	3,230	France	19
			Holland	2
			United States	42
			Foreign	385
	Timber, dressed	2,132	United States	1,085
	Timber, rough	3,826	United States	1,063
	Tobacco	1,669	United States	1,063
			Foreign	165
	Woodware	1,417	China	6
	(*a*) Venetian shutters.		Japan	42
	(*b*) Axe handles.		United States	562
	(*c*) Washboards, clothes pegs, &c.		Foreign	148
	(*d*) Matches.			
	Produce	6,699	France	407
			Japan	5
			United States	12
			Foreign	14

EXPLANATORY REPORT from COLLECTOR of CUSTOMS to the RECEIVER GENERAL, dated 15th June 1896, relative to securing MUTUAL TRADE between UNITED KINGDOM and the COLONIES for BRITISH PRODUCERS and MANUFACTURERS.

Beer and Ale:

(*a*) Germany.—German beer is drunk by Germans, who form about 3 per cent. of the adult population of Levuka. It is preferred also to British ale by many other residents of the Colony, being lighter in character.

British ale is imported into the Colony professedly for tropical consumption, but even this class of ale is found too heavy for many, who thus perforce drink German beer.

(*b*) United States.—This is lager beer also and is drunk for the same reason as the German article.

(*c*) Foreign.—This is nearly all German or Austrian lager beer.

Cigars and Cigarettes:

(*a*) Japan.—This is probably a special shipment and is not likely to be repeated.

(*b*) United States.—This item is composed entirely of cigarettes, Old Gold, and Old Judge.

(*c*) Foreign.—This consists of cigars, manufactured mainly in Germany.

Cocoa:

(*a*) Foreign.—This is Van Houten's cocoa, which has been imported into the Colony for many years. Fry's cocoa is now displacing it to some extent.

Drapery:

The trade of the Colony is so miscellaneous and goods enter it in such small lots of one kind that it is not possible to say with any definiteness why particular articles should be more favoured than others.

Fish, other:

Aberdeen canned herrings sell readily among all classes and are superseding more expensive fish, such as salmon and sardines, among the native and Indian sections of the community; non-British herrings are not imported. New Zealand canned fish is also imported. It is favoured by a Colonial export bounty.

(*a*) United States.—This consists mainly of canned salmon. This class of goods should in time be displaced by Vancouver salmon, conveyed to the Colony by the direct steamers.

(*b*) Foreign.—This is made up of sardines and other European fish.

Fruits, dried and preserved:

(*a*) United States.—This consists of canned fruit from California. This fruit has been imported steadily for many years. The sale of it is now being affected by the increased importation of Tasmanian and New Zealand fresh fruit. Fruit canning has been started lately in Victoria, but the Colonial article does not sell so readily in this Colony as Californian fruit, owing possibly to lack of experience on the part of the Colonial manufacturers.

(*b*) Foreign.—Under this head appear dates, currants, figs, raisins, and prunes.

Furniture:

(*a*) Germany. (*c*) United States. (*d*) Foreign.—These consist of bentwood chairs and couches which are adapted for a hot climate.

(*b*) Japan.—Small lots of cheap bamboo furniture are imported for sale at Christmas time and are sold by auction. They soon become worm eaten and the demand for them will cease.

Glassware and Crockery:

No special information can be given about these goods.

Hardware:

(*a*) Cutlery.
(*b*) Axes.
(*c*) Spades, shovels.
(*d*) Lampware.

(*a*) Germany.—Very inferior German cutlery is imported for the native trade. The German merchants in Levuka import German lamps for the natives, who buy many of them. They are cheap, attractive, but are lightly made.

(*b*) There is a steady sale of American axes throughout the Colony, which have long been celebrated for their finish and usefulness. The Jewish merchants in Suva import American lamps for the native trade. Cheapness and flimsiness characterise them.

Machinery:

(*a*) Steam engines.
(*b*) Locomotive.

All other:

(*b*) All other.

(*a*) France.—This item includes locomotive tyres and an injector, value 17*l*.

(*b*) Germany.—This item is comprised of large pieces of sugar and wood-working machinery, which are rarely imported.

(*c*) Foreign.—Of this item 1,341*l*. is represented by filter presses, which were imported by the Colonial Sugar Refining Company of Sydney, for use in one of their local sugar mills. This is a very old and wealthy company, which always buys in the best market.

Oils:

(*d*) Foreign.—This item includes mustard oil, which is imported in large quantities from British India for the use of the immigrant Indian population of the Colony. The exact proportion of the British product cannot, however, be given.

Plated-ware:

United States.—These goods are all flashy and cheap and will not last.

Ship-chandlery:

(*a*) Coal tar.

(*b*) Oars.

(*c*) France.—This item represents coal tar from Noumea, New Caledonia, a bye-product of a gaswork.

(*b*) United States.—This item consists of oars, which are cheap and good.

Timber, dressed.

Timber, rough:

American Oregon timber can be bought for a few shillings the hundred feet in Puget Sound, and is imported direct to the Colony in sailing vessels. There is no similar class of timber which can be landed from the Australian Colonies or New Zealand at the same price.

Woodware:

(*a*) Venetian shutters.

(*b*) Axe handles.

(*c*) Washboards, clothes pegs, butter boxes, &c.

(*d*) Matches.

(*b*) United States.—Venetian shutters are imported almost entirely from the United States, where they can be made more cheaply than in the Australian Colonies or New Zealand. American axe handles are unsurpassed.

(*a*) Japan.—This item consists of wooden matches, of which the importation to Fiji is increasing. They are cheaper than either the British or Swedish articles and are for the native trade.

(*c*) Foreign.—This item includes Swedish matches, which are displacing British matches as being cheaper.

Produce.

Bran:

(*a*) France.—This item consists nearly entirely of bran, which is imported from Noumea. Wheat is imported into Noumea from New South Wales free of duty and is ground in mills which were built a few years ago. There is an import duty in New Caledonia on Colonial flour. There is no local outlet for the bran and it is shipped to Fiji and sold at a low price.

Dressed and rough timber and bran are imported to the Colony in direct vessels from the United States and Noumea, respectively; with these exceptions a very large proportion of the non-British imports have been brought in and imported from Australia or New Zealand. Thus the values of them appear also in returns from other Colonies.

The headings in the return are from the local tariff with sub-heads as required, and references are made, when possible, to the "list" numbers.

15/6/96. J. R.

MALTA.

MALTA.

No. 30.

SIR A. J. LYON FREMANTLE to MR. CHAMBERLAIN.

(Received May 4, 1896.)

SIR, Palace, Valletta, April 25, 1896.

WITH reference to my Despatch of 29th February last,* I have the honour to transmit the amended returns which I undertook to cause to be prepared.

2. I have also the honour to transmit a copy of a letter from the Secretary to the Chamber of Commerce on the general features of this question.

3. The Chief Secretary has compiled for my information a report in which he analyses, on general principles, the causes of the falling off of British trade in Malta.

4. The care and thoroughness with which this information has been put together, under circumstances of exceptional difficulty, is sufficiently apparent without any comment on my part.

I have, &c.
A. J. LYON FREMANTLE,
Governor.

Enclosure 1 in No. 30.

(Translation.)

Chamber of Commerce, La Valletta,
SIR, January 10, 1896.

I AM directed by the Chamber of Commerce to acknowledge the receipt of your letter, No. 1 of the 2nd instant, enclosing a copy of a despatch from the Right Honourable the Secretary of State for the Colonies, under date the 28th November last, which has been addressed to all the Governors of the Colonies. In that letter a period of 10 days' time is fixed for the submission to his Excellency the Governor of any observations the Chamber of Commerce might think proper to make on the various questions contained in the said despatch, tending to show the causes that might have contributed in inducing local tradesmen to prefer, in regard to certain articles, foreign to British goods.

The Chamber of Commerce, always ready to co-operate in forwarding the trade of Malta, beg to submit to his Excellency the Governor that, in their opinion, the chief causes that have, in many instances, induced local tradesmen to substitute, either wholly or partially, foreign to British goods which formerly were imported here, are the following:—

1. The moderate prices.
2. The greater facilities afforded by foreign commercial houses.
3. The more frequent visits paid by commercial travellers representing foreign firms.
4. The difference in the rate of commission.
5. The difference in the packing charges.
6. The relative vicinity and the more frequent direct communication between the producing and the consuming countries.

As to moderate prices, it is undeniable that, for some time past, the continental industry has so developed, and has progressed to such an extent, that the imitation of the British merchandize, in some branches of trade, has become a most easy thing. It is, indeed, true that the imitation leaves much to be desired in so far as regards the quality of the goods, but, on the other hand, it is likewise true that foreign goods, being almost identical in appearance to the British, and at the same time inferior to them in quality, can be sold at a much lower price, and are consequently more within reach of all classes of the population, hence they are more in demand.

The greater facilities afforded by continental firms are sub-divided in—

Facilities with regard to the quantity of the orders, and

Facilities in the mode of effecting payments.

It is a well-known fact that the British commercial houses do not execute an order unless it be of a determinate quantity, which is sub-divided into other quantities for each particular article, whilst, with few exceptions, the continental houses, far from imposing to their clients any determinate quantity, very willingly adapt themselves to the exigencies of their clients, and do everything in their power to secure their custom by satisfying their wishes.

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* Not printed. Acknowledges the receipt of Mr. Chamberlain's despatch.

The other facility, which is now-a-days taken to great account by purchasers, is that of the mode of payment. It is almost a general usage among English houses to exact payment for goods sold, either on consignment of the bills of lading or by remittances within 30 days from the date of the invoice; the houses that allow a credit for three months from the date of the invoice are very few indeed. On the contrary, few are the continental houses that exact payment within three months, the generality spontaneously give credit without interest for a period of at least four to six months, which is further extended if so required.

Another advantage afforded by continental houses, in order to secure a clientship, is the discount allowed for payment in cash, that is to say, within 30 days from the date of the invoice, and, in many instances, also from the date of the consignment of the goods; for, whilst as a general rule, British houses do not allow but 2½ per cent. discount for payment in cash, the continental houses generally allow from 3 to 5 per cent.

What contributes more, besides the above enumerated advantages, to induce local tradesmen to prefer the continental houses, are the frequent visits paid by the commercial travellers belonging to those houses, who come furnished with extensive assortments of patterns for submission to their customers, a thing which the greater part of the British houses never or very rarely do. The frequent visits of commercial travellers bring about personal knowledge between them and their customers, which is a great and very effective means for transacting business, a thing that cannot be done by the mere sending of patterns.

Besides, the fact that the patterns sent separately to the clients can never be compared with the extensive assortment of patterns exhibited by the commercial travellers to their client for making his choice, the personal acquaintance made between the client and the traveller, on the latter's first visit to this market, facilitates the transactions, and induces the client not to let him leave the island without having given him an order, which, in many cases, he would not have thought of giving to that house, had he not been induced to do so by the visit or the insistence of the commercial traveller.

The fourth of the causes above enumerated is the difference in the rates of commission charged by the British commission agents when the orders are made through them, because, whilst the continental houses never exact more than 2 per cent., the British commission agents charge a much higher rate of commission.

There is then a marked difference in the packing expenses, which are generally charged by the British houses to almost double the rate charged by the continental houses.

The Chamber of Commerce, lastly, beg to point out that, previous to the year 1884, a large quantity of the British goods of every description which used to be imported was intended for re-exportation to Greece, Egypt, Sicily, Algeria, Tunis, and to other ports of Barbary. Such goods, on account of the direct communications established between the United Kingdom and those countries, are now sent there direct, independently of our market, and this has greatly contributed to the diminution of the importation of goods from England.

The Chamber of Commerce, after having submitted the above general observations, beg briefly to indicate, on the information they have been able to attain and the data they succeeded to gather within the short period of the time fixed to them for reporting on so important a subject that would require much more time, the articles which were formerly almost exclusively imported from England, and are now, either wholly or in part, imported from continental countries. These articles are chiefly the following:—

Arms and ammunition.	Earthen and china ware.	Silver articles.
Empty bags.	Hardware.	Soap.
Candles.	Hats.	Spirits.
Cement.	Leather.	Sugar.
Clocks.	Paper.	

The Chamber of Commerce regret being unable, for the reasons above stated, to give further details, but from what they have had the honour to submit, it clearly results that the chief causes that have determined or have contributed towards the displacement of what was the practice in former years, when the above-mentioned articles were generally imported from the United Kingdom, are those pointed out at the commencement of the present letter.

I have, &c.
G. NICOSIA,
Secretary.

The Hon. and Most Noble
Count G. Strickland, C.M.G.,
Chief Secretary to Government.

MALTA.

Enclosure 2 in No. 30.

Chief Secretary's Office, Valletta,
April 25, 1896.

SIR,

WITH reference to your Excellency's Despatch No. 39, of the 29th February last, to the Secretary of State, in which you laid before Mr. Secretary Chamberlain the difficulties which existed in obtaining complete and reliable returns showing the extent to which, in this Colony, foreign imports have displaced, and are displacing, similar British goods, and the causes of such displacement, I have now the honour to submit revised returns, in which information, based upon individual opinion of such of the local merchants as have been good enough to favour the Government with information, has been averaged and classified.

2. These returns are necessarily incomplete; but I venture to hope that, in view of the difficulties experienced in Malta on account of the hostility of the commercial community (supported by the Council of Government) to the official compilation of periodical statistics, they may be accepted as an approximate indication of the drift of Maltese trade, sufficiently close to forward the object which the Secretary of State had in view in his despatch of the 28th November 1895.

3. The returns forwarded herewith are three:—(1.) A table* of the estimated proportion of importation from (*a*) the United Kingdom, (*b*) Germany, (*c*) France, (*d*) Italy, (*e*) Belgium, (*f*) Austria, (*g*) the Turkish Empire, and (*h*) from other countries: (2.) A set of printed forms giving for each article in the schedule in Mr. Chamberlain's despatch all the information which it has been possible to obtain with reference thereto from the local merchants and other available sources; and (3.) A report compiled by one of the principal brokers (who enjoys the confidence of the Collector of Customs) in which observations are set out on the salient feature of the trade in the several articles reported upon.

4. From a survey of correspondence with several gentlemen who have given their assistance in the examination of this question, and from a review of the tabulated returns it appears that, generally speaking, British trade in Malta is being displaced by foreign imports to an appreciable extent.

5. In endeavouring to analyse the general causes of this displacement of trade it seems important to consider imports from the point of view in which such goods represent value derived, to a greater or less extent from (*a*) raw material, (*b*) labour, (*c*) efficiency of the means used to convey the article to the consumer.

(a.) *Raw Material.*—The raw material made use of by the English manufacturers or handled by English merchants, is not invariably of the first class or up to sample, but it is, as a rule, far superior to the average of the raw material dealt with in the trade from other countries. Therefore, where quality is sought for, and where capital rather than labour is the principal element in the value of the product, British trade is still in a position of unrivalled eminence. An exception to this rule should be noted in the case of iron bars, and, particularly, joists and girders imported from Belgium; the iron or steel is not so quite so good as the English in quality, but the quality and workmanship are above, or well up to, the standard of the wants that have to be met, namely, the building of houses and constructions in which the high standards called for in ship-building, &c. are not sought for or required.

(b.) *Labour.*—With regard to articles the value of which is chiefly the result of labour, English importations are fast being displaced by those of Belgium, Italy, Germany, France, and Austria-Hungary.

There is no doubt that, where the highest excellence is sought for, or where especial skill is necessary, the productions of English labour are still pre-eminent. But the masses and the vast majority of consumers are not buyers of the best class of goods; they seek middle class quality in combination with cheapness. The low-priced articles may be less lasting and dearer in the long run; but with the masses, the factor of interest on outlay weighs heavily, because the capital is not at their command to buy articles of the very best quality, even when such articles are known to wear better, last longer, and to satisfy more thoroughly the wants they are made to meet, at less ultimate cost, when all is reckoned, than the cheaper and more perishable competitor of foreign origin.

It appears to be established that the masses will continue, for the above reasons, to determine their preference against all the superior and higher priced goods of British origin whenever the raw material is a small factor in the prime cost, and the value of the article is principally the result of labour.

* Not printed as the whole of the information is contained in the table which follows.

The English labourer may command the market of the wealthiest class in any country, but not the market for the masses in a place like Malta, where the productions of cheaper German, Italian, and French labour compete without any disadvantage as to tariffs or cost of transportation.

It also appears that, although foreign labour is not as efficient as English labour, compared at the same cost per hour, nevertheless the cost per hour of foreign labour in the competing countries is so much below that of English labour, that the saleable value added to the raw material by foreign labour is generally greater than in the case of English labour. Hence, there is reason to apprehend that the ground lost by English trade in Malta from these causes cannot be regained, as long as the English workman may determine to work only for wages so high, as at present, above those paid by the rivals of the British merchant for foreign skilled labour.

It appears that the skill of the foreign labourer has of late greatly increased, and in most cases it may have nearly approached that of the British labourer.

The longer hours of work usual with the foreign working men are also a very important factor in improving the position of the foreign importer. If the comparison is made of the cost of wages per hour, the fact that longer hours are worked by the foreigner is to the advantage of the foreign capitalist, although it be to the disadvantage of the foreign labourer who cannot, during each hour of more prolonged work, develop the highest and more concentrated form of energy which the British workman, toiling for shorter hours a day, may be able to bring to bear on his work.

(*c.*) *Efficiency of conveyance to the Consumer.*—Under this heading the falling off of British trade is due to—

The willingness of foreign manufacturers to deal direct with Maltese retailers;

The frequent employment of wholesale agents, as intermediaries, by English manufacturers;

The relative cheapness or dearness of the working capital employed respectively by British and foreign traders;

The rapidity with which capital is turned over in each case;

The risks run in contracting, providing for, and collecting bad debts;

The higher cost of freight from England to Malta as compared with the freight from the principal foreign competing countries;

The lower rates of commission charged by foreign commercial travellers;

Foreign packing being less extravagent;

The readiness of foreign merchants to quote prices inclusive of all incidental charges.

The efforts made to adapt the wholesale trade to the local usages of the retail trade.

Under this head may be included the greater willingness of the smaller foreign merchants to correspond in the language of the retailer, to alter their patterns according to the taste of the local retailer with less reluctance, and to book orders of the size and for dates of consignment to suit retailers in a smaller way of business, than appear to receive equal attention from English manufacturers.

It appears that British trade has the advantage of cheaper capital to work with, but this advantage is diminished by the additional care which the cheaper capital implies in guarding it against bad debts and other risks, *e.g.*, the precaution of exacting payment against bill of lading or the intervention of a responsible financial agent.

In the other minor factors tending to cheap and efficient distribution, the foreign trader, as far as Malta is concerned, appears to have the advantage of the English trader. The foreigner is more willing to compromise on a dispute arising. If foreign goods have been imported through London the English agent is set aside by efforts to deal direct when the foreign merchandise marks draw attention to the country of origin.

It is doubtful whether the additional risk which he would have to run, is likely, in view of the comparatively small volume of trade for local consumption, to induce the British trader to resort to the acceptance of very small orders, to the giving of long and precarious credit, to the same pushing and begging for orders, and to correspond in any and every mixture of languages, as is practised to an increasing extent by foreign merchants trading with Malta.

I have, &c.,
G. STRICKLAND,
Chief Secretary to Government.

MALTA.

No.	Commodity.	Year.	Total Value of Importation into Malta from all Countries.	Value of Importations from Foreign Countries.		Remarks.
			£		£	
1	Alkali - -	1884	1,460	Tunis - -	160	Foreign articles cheaper than the English. For the manufacture of aërated waters, and of soap.
		1889	1,438	France - -	46	
				Italy - -	42	
				Tunis - -	120	
				Total - -	208	
		1894	1,496	France - -	49	
				Italy - -	101	
				Tunis - -	136	
				Total - -	286	
2	Animals: Horses - -	1884	3,137	France - -	900	Horses from the United Kingdom are generally imported in a limited number for military uses; the bulk of the importation is from the Turkish Empire and from Tunis; the latter are cheaper and more suited to the wants of the Island.
				Turkish Empire -	216	
				Tunis and Russia -	1,301	
				Total - -	2,417	
		1889	4,376	France - -	220	
				Italy - -	1,050	
				Turkish Empire -	1,618	
				Tunis - -	1,098	
				Total - -	3,986	
		1894	5,265	Italy - -	510	
				Turkish Empire -	2,052	
				Tunis - -	2,453	
				Total - -	5,015	
3	Apparel and slops -	1884	1,750	- - -	Nil	English clothing materials are subjected to very keen competition on account of the importation of similar goods from Germany, Italy, and France. Such articles from Germany and Italy are comparatively very cheap. Ready made clothes are imported in large quantities at very low prices.
		1889	3,008	Germany - -	812	
				France - -	757	
				Italy - -	469	
				Total - -	2,038	
		1894	2,998	Germany - -	805	
				France - -	773	
				Italy - -	450	
				Persia and India -	240	
				Total - -	2,268	
4	Arms and ammunition: (a) Firearms (small).	1884	890	- - -	Nil	English guns are generally preferred, but many sporting guns are imported from France and Belgium, and a few others from Germany and Italy.
		1889	872	Germany - -	43	
				France - -	129	
				Italy - -	42	
				Belgium - -	120	
				Total - -	334	
		1894	777	Germany - -	42	
				France - -	168	
				Italy - -	41	
				Belgium - -	130	
				Total - -	381	
	(c) Arms other than fire-arms.	1894	840	Germany - -	530	No information available for earlier years.
				France - -	210	
				Total - -	740	

No.	Commodity.	Year.	Total Value of Importation into Malta from all Countries.	Value of Importations from Foreign Countries.		Remarks.
			£		£	
5	Bags, empty	1884	3,500	-	Nil	Price from 4d. to 6d. per bag, according to the price of the raw material.
		1889	3,300	-	Nil	Suitable for local purposes and for packing potatoes.
		1894	3,700	Italy	320	Used to be imported exclusively from England, but now they are principally imported from India direct to this port, as their cost is about 1d. per bag cheaper.
8	Bleaching materials	1884	790	-	Nil	
		1889	690	-	Nil	
		1894	768	France	160	
				Other countries	90	
				Total	250	
9	Books, printed	1884	1,405	Italy	500	
		1889	1,485	Italy	475	
		1894	1,450	Italy	445	
10	Butter (including margarine).	1884	3,640	-	Nil	English and Cork butter are appreciated, but the importers of that article are confronted with a very keen competition on account of the importation of butter and margarine from Lombardy, Switzerland, and Germany. Australian butter has lately been introduced and can compete in price and quality.
		1889	7,645	Italy	1,500	
		1894	13,440	Germany	1,840	
				Italy	9,500	
				Total	10,840	
11	Candles of all sorts	1884	2,385	Germany	195	Candles for churches, of which a large quantity is consumed, are manufactured in Malta from pure beeswax, with the exception of a small quantity imported from Trieste, which is mixed with another substance called ceresina; the former are sold at from 12l. 10s. to 15l. per 175 lbs., and the latter at 9l. to 11l. All other kinds of candles are imported from the United Kingdom, with the exception of a small quantity from Germany and France.
				Austria	140	
				Total	335	
		1889	2,315	Germany	385	
		1894	2,440	Germany	390	
				France	210	
				Total	600	
14	Cement	1884	290	-	Nil	The price of foreign cement is 1s. to 2s. less than that of the English, which is sold at 8s. to 10s. per cask.
		1889	950	-	Nil	English cement is better than the foreign. Casks more uniform and labelled. Belgian cement is inferior in quality.
		1894	2,295	France	95	
				Belgium	600	
				Total	695	English cement being more durable and stronger, is preferred to the foreign. It is generally used in masonry, and especially in water. The French and Belgian are used for pavements, tiles, &c.
						English cement is packed in casks; Belgian cement is packed in frail casks; the French is imported in bags and in casks.
						Belgian cement generally not marked, and when marked the labels are in plain English and not meant to deceive the trade.

MALTA.

No.	Commodity.	Year.	Total Value of Importation into Malta from all Countries.	Value of Importations from Foreign Countries.		Remarks.
			£		£	
15	Cheese - -	1884	11,020	Italy - -	5,700	Sicilian cheese from 78*s.* per 175 lbs.; Sardinian cheese from 38*s.* to 80*s.* per 175 lbs.; Greek cheese from 60*s.* to 85*s.* per 175 lbs.; Dutch cheese from 60*s.* to 90*s.* per 175 lbs.; American cheese 85*s.* per 175 lbs.
				Greece & Sardinia	4,360	
				Total -	10,060	
		1889	14,140	Italy - -	5,680	English, Swiss, Italian, American, and Dutch cheese are consumed by the upper classes; the bulk of the cheese imported from Sicily, Sardinia, and Greece is consumed by the lower classes.
				Greece & Sardinia	4,500	
				Total -	10,180	
		1894	17,456	Germany - -	69	American cheese is imported through the United Kingdom.
				Italy - -	5,100	
				Greece, Sardinia, Holland, and Switzerland.	6,967	
				Total -	12,136	
18	Clocks and Watches: (*a*) Clocks -	1884	758	Germany - -	398	Price from 15*s.* to 100*s.* according to quality, size, and finish.
				America - -	360	
				Total -	758	American clocks, which are imported vid Liverpool, are fairly good, durable, and not expensive. German clocks inferior.
		1889	680	Germany - -	390	
				America - -	290	
				Total -	680	
		1894	766	Germany - -	450	
				France - -	50	
				Austria - -	56	
				America - -	210	
				Total -	766	
	(*b*) Watches -	1884	680	Switzerland -	290	English watches are almost entirely replaced by those from Germany and Switzerland. There is only one firm in Malta that imports English watches (Benson's), and even this solitary firm does not deal in them on their own account, but as Benson's agents. A German watch in gold case may be obtained for 2*l.*, whilst a watch of Benson's in a silver case costs about 5*l.*
		1889	675	Switzerland -	335	
		1894	690	Germany - -	120	
				Switzerland -	380	
				Total -	500	
19	Coals, &c.: (*b*) Cinders and fuel	1884	23,970	Italy - -	16,050	Charcoal and other fuel, of which there is a great consumption, are imported from Leghorn and from Greece; the Italian charcoal is superior to the other.
				Greece - -	7,920	
				Total - -	23,970	
		1889	23,880	Italy - -	16,050	
				Greece - -	7,830	
				Total - -	23,880	
		1894	25,025	Italy - -	17,030	
				Greece - -	7,995	
				Total - -	25,025	
	(*c*) Products of coal (except dyes).	1884	522	Norway & Sweden	180	Products of coals, such as naphtha, pitch, and tar, are manufactured locally in small quantities, but they are also imported from the United Kingdom, Norway, and Sweden.
		1889	541	Norway & Sweden	151	
		1894	521	Norway & Sweden	146	

No.	Commodity.	Year.	Total Value of Importation into Malta from all Countries.	Value of Importations from Foreign Countries.		Remarks.
			£		£	
20	Cordage and twine -	1894	1,820	Germany - -	180	No information for earlier years.
				Italy - -	340	Italian cordage is sold at a higher price than the English.
				Belgium - -	200	The Italian is superior because made of pure hemp, and is softer.
				Total - -	720	For local requirements and for those of shipping.
						Raw material is imported from Naples, to be manufactured locally. Twine is imported from Germany, and is found to be good and cheap.
21	Corn :					
	(a) Wheat - -	1884	134,106	Turkish Empire -	3,658	Only hard wheat from the Black Sea and the Sea of Azof is consumed in these islands. It is only when, on account of a bad harvest or from other causes, the price of this class of wheat rises considerably above the average, that some quantities of other wheat are imported from Barbary, Tunis, Algiers, and Bombay. When, however, the price of hard wheat is normal, as it has been for several years past, no other class of wheat is imported.
				Russia - -	130,448	
				Total - -	134,106	
		1889	203,952	Turkish Empire -	8,730	
				Russia -	195,779	
				Total - -	199,509	
		1894	109,683	Russia - -	109,683	
	(b) Wheat, manufactured.	1884	2,810	France - -	883	English wheat flour from 11s. to 12s. per cantar = 175 lbs ; foreign wheat flour from 12s. to 13s. per cantar = 175 lbs.
				Italy - -	157	
				Turkish Empire -	55	
				Tunis - -	82	Under this heading wheat flour is included. This first began to be imported about six years ago from Roumania ; about two years after it began to be imported from the United Kingdom ; wheat flour of English manufacture has now superseded the Roumanian ; the importation is considerable, and is being kept up with great activity. The brands most favoured by dealers here are Appleby Bros. and Mersey Flour Mills, both of Liverpool, but many other brands are imported as well.
				Total - -	1,077	
		1889	21,676	Germany - -	13	
				France - -	337	
				Austria - -	777	
				Turkish Empire -	13,756	
				Other countries -	4,330	
				Total - -	19,213	
		1894	32,339	Germany - -	42	
				France - -	1,396	
				Italy - -	607	
				Belgium - -	19	
				Austria - -	989	
				Turkish Empire -	860	
				Other countries -	209	
				Total - -	4,122	
	(c) Corn, other than wheat.	1884	3,399	Italy - - -	1,119	Under this head barley and indian corn are included. The former is imported from the Black Sea, Turkey, Barbary, and Tunis, and the latter from Galats, Barbary, Turkey, and Greece. It is used almost exclusively as food for animals ; and the importation is small because the duty levied on it is considered too high in comparison to that levied on other kinds of farinaceous food.
				Turkish Empire -	1,000	
				Russia - -	780	
				Total - -	2,899	
		1889	21,676	Turkish Empire -	7,800	
				Russia and Tunis -	1,140	
				Total - -	8,940	
		1894	23,730	Austria - -	600	
				Turkish Empire -	10,730	
				Tunis and Russia -	12,300	
				Total - -	23,630	

No.	Commodity.	Year.	Total Value of Importation into Malta from all Countries.	Value of Importations from Foreign Countries.		Remarks.
			£		£	
23	Cotton Manufactures: (a) Piece goods, white or plain.	1884	28,500	——	—	The above articles were formerly imported, on a very large scale, to be in the greater part re-exported to Tunis and to the other states on the Mediterranean coast of Africa; that trade has now ceased owing to the French Protectorate, and to the fact that those places are being now visited by commercial travellers. The importation is at present limited to what is required for local consumption.
		1889	22,300	——	—	
		1894	17,650	Germany - -	950	
	Piece goods, printed, checked, or dyed.	1884	20,300	——	—	Of the above articles, checked piece goods are imported from Switzerland, Italy, France, and Germany; a few parcels of piece goods of mixed materials from Austria and Italy; the bulk of such materials being imported from the United Kingdom.
		1889	17,400	——	—	
		1894	31,560	Germany - -	7,500	
				France - -	9,560	
				Italy - - -	1,700	
				Total - -	18,760	
	Piece goods of mixed materials.	1884	15,300	——	—	
		1889	12,500	——	—	
		1894	21,000	Germany - -	3,000	
				Italy - -	5,000	
				Austria - -	3,700	
				Total - -	11,700	
	(b) Stockings and socks.	1884	2,485	Germany - -	150	The superior quality of woollen stockings and socks is imported from Nottingham. The inferior quality from Germany, and is almost exclusively supplied from the Chemnitz factories. Heavy cotton goods of this nature are exclusively imported from Italy.
				France - -	270	
				Italy - -	165	
				Total - -	585	
		1889	2,625	Germany - -	170	
				France - -	295	
				Italy - -	230	
				Total - -	695	
		1894	2,795	Germany - -	750	
				France - -	290	
				Italy - -	215	
				Austria - -	130	
				Total - -	1,385	
	(c) Thread for sewing.	1884	1,950	- - -	Nil	Importations of superior quality of this article come from England. Other qualities, which are considered as fair are imported from Italy, Germany, France, and Austria. The production of Italian goods of this as of other nature is daily improving.
		1889	1,575	Italy - -	390	
				Austria - -	155	
				Total - -	545	
		1894	1,892	Germany - -	380	
				France - -	495	
				Italy - -	386	
				Austria - -	140	
				Total - -	1,401	
24	Earthen and china-ware (including crockery).	1884	7,000	- - -	Nil	These articles used to be imported exclusively from the United Kingdom, and on a very large scale for local use and for exportation to Sicily, Tunis, and Tripoli, but the exportation has ceased, and the present importation is for local use only. Italy is competing very keenly in price, quality, and pattern. China-ware is also imported in a small quantity from Bohemia.
		1889	4,700	Italy - -	700	
		1894	2,469	France - -	240	
				Italy - -	779	
				Austria - -	150	
				Total - -	1,169	

No.	Commodity.	Year.	Total Value of Importation into Malta from all Countries.	Value of Importations from Foreign Countries.		Remarks.
			£		£	
24A	Earthenware glazed pipes.	1894	2,300	France - -	100	Earthenware pipes are almost exclusively imported from the United Kingdom. A steady trade has been done for many years in this article; it was first introduced on the occasion of the remodelling of the drainage of Valletta and of the three cities. The trade continues steady, although not on such a large scale as during the drainage works. An importation of the article lately started from France did not succeed. French pipes are cheaper than the English. The English pipes have a better finish, and are stronger. Glazed pipes are now being manufactured locally; the finish, however, and glazing of the English pipes have not as yet been approached.
25	Fish: (*b*) Fish, other than herrings.	1884	12,092	France - -	254	Salt fish, salmon, cod fish, and stockfish are exclusively imported from the United Kingdom; other kinds of fish from other countries. Cod-fish used to be imported on a large scale by sailing vessels direct from Newfoundland and re-exported to Sicily and Greece; the exportation has now ceased, those places being at present provided from elsewhere. The price of codfish is from 20*s.* to 37*s.* per 175 lbs. Sardines and anchovy are imported preserved and salted, the preserved in tins from France, and the salted in barrels from Sicily; the latter are largely used by the lower classes. The price of salted sardines and anchovy is from 45*s.* to 50*s.* per 175 lbs. Preserved salmon, lobsters, &c. are imported from the United Kingdom.
				Italy - -	1,838	
				Total - -	2,092	
		1889	10,667	France - -	2,660	
				Italy - -	1,007	
				Total - -	3,667	
		1894	14,598	France - -	950	
				Italy - -	3,000	
				Turkish Empire -	298	
				Tunis - -	850	
				Total - -	5,098	
26	Furniture and cabinet wares.	1894	4,906	France - -	519	No information as to earlier years. House furniture used to be of local manufacture, but now foreign manufactures have been introduced and meet with ready sale. They are imported from Austria, Sicily, France, and the United Kingdom. A comparatively large quantity of solid walnut and mahogany furniture is still being manufactured locally.
				Italy - -	1,190	
				Austria - -	2,557	
				Total -	4,266	
	Upholstery wares	1894	4,866	Germany - -	840	No information as to earlier years. Upholstery wares are generally manufactured locally with materials imported from the United Kingdom, France, Germany, Italy, and Austria.
				France - -	810	
				Italy - -	486	
				Austria - -	290	
				Total - -	2,426	
27	Glass: (*a*) Plate, rough or silvered.	1894	670	Germany - -	250	No information as to earlier years.
				France - -	110	
				Total - -	360	
	(*c*) Bottles, common.	1894	610	France - -	510	English bottles for mineral waters better finished. Firms in Malta trading with Germany give preference to the English goods.
	Bottles for mineral waters.	1894	1,310	France - -	310	
	(*d*) Glass, other than plate, flint, and bottles.	1894	10,050	France - -	1,700	Price of window glass: English, from 1¾*d.* to 3*d.* per foot; Belgian, from 1¼*d.* to 2½*d.* per foot. The best quality is the English, but it is not imported on account of its being too dear in comparison to the Belgian.
				Italy - -	2,100	
				Belgium - -	6,250	
				Total - -	10,050	

No.	Commodity.	Year.	Total Value of Importation into Malta from all Countries.	Value of Importations from Foreign Countries.		Remarks.
			£		£	
28	Grease, tallow, and animal fat.	1884	1,840	Italy - -	100	English tallow from 3*d.* to 4*d.* per lb. Grease and tallow are also obtained in the Island.
				America - -	730	
				Total - -	830	
		1889	3,280	Italy - -	320	
				America - -	2,200	
				Total - -	2,520	
		1894	4,200	Italy - -	1,200	
				America - -	2,900	
				Total - -	4,100	
29	Haberdashery and millinery.	1884	3,900	- - -	Nil	Foreign goods are cheaper than the English; the latter are, however, superior in quality. Used formerly to be imported from the United Kingdom, but now the importation may be stated to be three-sevenths from the United Kingdom and four-sevenths from foreign countries. Foreign articles are in many cases marked and sold as English-made goods. The importation from foreign countries is principally due to the comparative cheapness of the articles and to the activity of the commercial travellers, who accept orders even of a few shillings.
		1889		No information.		
		1894	4,685	Germany - -	930	
				France - -	790	
				Italy - -	680	
				Belgium - -	300	
				Austria - -	285	
				Other countries -	300	
				Total - -	3,285	
30	Hardware: (*a*) Files - - (*b*) Saws. (*c*) Edge-tools.	1884	480	Germany - -	130	German prices from 2*d.* to 8*s.* English prices from 2½*d.* to 10*s.* These articles used for many years to be imported only from the factories of Sheffield and Birmingham, and continued so until German houses imitated the English goods and sent out commercial travellers for orders. Although German hardware goods are now freely sold having the same appearance of English goods in every respect, and labelled in English, and packed in the same way as the English, the quality of the German goods is far inferior. British trade-marks often imitated.
		1889	460	Germany - -	120	
		1894	490	Germany - -	100	
				France - -	80	
				Total - -	180	
	(*e*) Chandeliers -	1884	240	- - -	Nil	
		1889	90	- - -	Nil	
		1894	918	Germany - -	160	
				Austria - -	545	
				Switzerland -	93	
				Total - -	798	
	(*g*) Bedsteads -	1884	1,930	Italy - -	830	The manufacture of bedsteads was carried on for many years as a local industry. They were manufactured with iron imported from the United Kingdom, and a very large trade was carried on with the neighbouring coast of Africa, a limited supply of fancy bedsteads being at the same time imported from Genoa. For the last 15 years, however, goods of English manufacture superseded the articles made in Malta or in Leghorn, and now, with the exception of a limited importation from Germany and Italy, the trade in this article has been transferred to the United Kingdom, the solidity, cheapness, and shape having secured the command of the Malta trade.
		1889	2,120	Italy - -	190	
		1894	4,360	Germany - -	790	
				Italy - -	70	
				Total - -	860	
	(*f*) Buttons	1884	655	- - -	Nil	Used to be imported exclusively from the United Kingdom, but of late these goods have been imported also from Germany, France, and Italy. The foreign goods, although not so solid as the English, are sold freely on account of their comparative cheapness.
		1889		No information.		
		1894	695	Germany -	290	
				France - -	80	
				Italy - -	35	
				Total - -	405	

No.	Commodity.	Year.	Total Value of Importation into Malta from all Countries.	Value of Importations from Foreign Countries.		Remarks.
			£		£	
30	Hardware—*cont.*					
	(*m*) Hollow-ware	1884	481	- - -	Nil	Foreign articles are comparatively cheaper. British goods more durable. All suit the market. No difference in packing.
		1889		No information.		
		1894	800	Germany - -	210	Articles of hollowware were till recently exclusively imported from the United Kingdom, but they were some time ago introduced from France and Germany at a cheaper price than the English; now that competition in every branch of trade is very keen, local traders look to the cheapness of the article and not to the quality and durability.
				France - -	130	
				Austria - -	190	
				Total - -	530	
	(*p*) Nails - -	1884	1,350	Belgium - -	850	English nails from 2*d.* to 11*d.* per lb. (including copper and brass); Belgian nails from 2½*d.* to 4*d.* per lb. (iron nails only); Austrian nails from 2½*d.* to 7*d.* per lb. (iron nails only).
				Austria - -	300	
				Total - -	1,150	
		1889	1,480	Belgium - -	870	
				Austria - -	360	
				Total - -	1,230	
		1894	1,490	Belgium - -	860	
				Austria - -	370	
				Total - -	1,230	
	(*q*) Screws -	1884	520	France - -	100	English from 4*d.* to 10*s.* per gross; German from 3*d.* to 7*s.* per gross; French from 3½*d.* to 4*s.* per gross. Screws made in England are preferred by the Royal Engineers Department, though there are many buyers of the foreign make. Foreign screws are packed in blue paper.
		1889	550	Germany - -	180	
				France - -	100	
				Total - -	280	
		1894	650	Germany - -	200	
				France - -	150	
				Total - -	350	
	(*r*) Tinware -	1894	2,160	France - -	310	No information for earlier years.
				Austria - -	290	
				Total - -	600	
30A	Cutlery - -	1884	735	- - -	Nil	German and French cutlery is very inferior to the English, but on account of cheapness such goods find a ready sale in this market. German wares are often marked as English.
		1889	670	Germany - -	68	
				France - -	62	
				Total - -	130	
		1894	910	Germany - -	130	
				France - -	140	
				Belgium - -	160	
				Other countries -	90	
				Total - -	520	
31	Hats:					
	(*a*) Straw hats -	1884	1,130	Italy - -	190	Italian hats are inferior in quality to the English, but being lighter, and consequently more adapted to the climate, they find a ready sale. Italian goods are generally marked and sold as English made goods.
		1889	970	Italy - -	340	
		1894	860	Italy - -	340	

MALTA.

No.	Commodity.	Year.	Total Value of Importation into Malta from all Countries	Value of Importations from Foreign Countries.		Remarks.
			£		£	
31	Hats—*cont.* (*b*) Hats, other than straw hats.	1884	1,790	France - -	90	Felt hats (hard) are principally imported from the United Kingdom; a considerable quantity is, however, brought from Italy. These are generally an imitation of the English hats and are labelled and sold as such. Soft hats made of felt or wool which are in general use amongst the lower classes are imported from Italy; France also supplies a large quantity of this kind of hats.
		1889	1,825	France - -	85	
				Italy - -	240	
				Total - -	325	
		1894	1,995	France - -	595	
				Italy - -	510	
				Total - -	1,105	
33	Instruments and apparatus: Surgical, anatomical, and scientific instruments and apparatus.	1884	530	Germany - -	80	English instruments are more solid, but German and French instruments are better finished and cheaper.
				France - -	100	
				Total - -	180	
		1889	535	Germany - -	95	
				France - -	120	
				Total - -	215	
		1894	733	Germany - -	100	
				France - -	140	
				Other countries -	153	
				Total - -	393	
34	Leather: (*a*) Leather, unwrought.	1884	8,930	France - -	7,300	English leather is very little used; the greater part of the leather imported is from France (Toulon), and the rest from different parts of Italy, especially from Genoa.
				Italy - -	1,630	
				Total - -	8,930	
		1889	8,710	France - -	7,100	
				Italy - -	1,610	
				Total - -	8,710	
		1894	8,860	France - -	6,980	
				Italy - -	1,580	
				Total - -	8,510	
35	Linen and jute yarn: (*a*) Linen yarn -	1894	571	Germany - -	396	No information for earlier years. Linen yarn of the best quality comes from Ireland; the more ordinary grades are imported from Germany and France.
				France - -	90	
				Total - -	486	
36	Linen and jute manufactures: (*a*) Linen manufactures: *a* White or plain. *b* Printed, checked, or dyed.	1884	7,120	- - -	Nil	The superior grades of white and plain linen manufactures come from England; the ordinary quality is imported principally from the United Kingdom and partly from Austria, Italy, and Germany. The foreign goods are sold as English made goods and are marked as such.
		1894	10,982	Germany - -	2,911	
				Italy - -	1,400	
				Austria - -	1,450	
				Total - -	5,761	
	(*d*) Linen thread for sewing.	1894	2,905	Germany - -	732	No information for earlier years. The superior quality is imported from England; the ordinary quality from the continental countries.
				France - -	90	
				Italy - -	38	
				Austria - -	260	
				Total -	1,115	

No.	Commodity.	Year.	Total Value of Importation into Malta from all Countries.	Value of Importations from Foreign Countries.		Remarks.
			£		£	
39	Medicines - -	1884	560	Italy - -	250	As a facility to importers of German medicines, orders of not less than 200 francs are sent free of charge to Malta.
				Other countries -	100	
				Total - -	350	
		1889	610	Italy - -	280	
				Other countries -	90	
				Total - -	320	
		1894	851	Germany - -	58	
				France - -	58	
				Italy - -	225	
				Other countries -	120	
				Total - -	461	
40	Metals (iron or steel): *a.* Iron:— (*c*) Bar, angle, bolt, and rod.	1884	7,360	- - -	Nil	The transit trade in these articles used formerly to be very important. The importation was principally from England, and to a great extent also from Scotland. The transit trade is now almost at an end, owing to the fact that orders from the the coast of Barbary, Tunis, and Sicily, are at present being supplied direct. The importation is now limited to local requirements only. A few bolts and locks are manufactured locally out of common iron imported for the purpose. The better quality of ready made bolts and locks comes from England; the ordinary and cheaper articles come from Germany and compete on advantageous terms with the former. French and American bolts and locks are also imported, and they are considered to be good and cheap.
		1889	6,800	- - -	Nil	
		1894	2,280	Austria - -	150	
	(*g*) Hoops -	1884	1,900	- - -	Nil	Hoops are imported to a considerable extent from Staffordshire and from Wales, and re-exported to the coast of Barbary for baling esparto grass; the article is now also imported from Belgium, it being cheap and answering the purpose for which it is imported, namely, local manufacture of casks.
		1889		No information.		
		1894	1,490	Belgium - -	390	
	(*i*) Wrought iron and steel joists.	1884	2,600	Belgium - -	700	English joists from 6*l.* to 7*l.* per ton. Belgian joists from 4*l.* 10*s.* to 5*l.* per ton.
		1889	8,840	Belgium - -	4,000	
		1894	5,450	Belgium - -	4,700	
	(*k*) Cast or wrought iron manufactures other than those already described.	1884	720	- - -	Nil	Iron stoves and other utensils, whether enamelled, galvanised, nickel-plated or silvered, which used formerly to be exclusively imported from the United Kingdom, now come in large consignments from Germany, and in small quantities from France, Antwerp, and Trieste. The price of these commodities is comparatively cheap, and the demand is consequently large.
		1889	695	- - -	Nil	
		1894	1,020	Germany - -	350	
				Belgium - -	120	
				Austria - -	150	
				Total - -	620	
	b. Copper:— Copper, unwrought or partly wrought. (*b*, *c*, *d*, *e*).	1884	3,800	- - -	Nil	The finer quality of mixed and yellow metal is imported from the United Kingdom; the ordinary quality from Germany and France; pig lead is almost exclusively imported from the United Kingdom; shot is to some extent furnished by the "Chill Shot Co." in England, but French shot, being cheaper, is more in use. The best quality of unwrought tin from England; other qualities are imported from Furth in Bavaria.
		1889	3,700	- - -	Nil	
		1894	6,800	Germany - -	1,000	
				France - -	900	
				Total - -	1,900	
	(*f*.) Zinc, wrought or unwrought.	1884	1,800	Belgium - -	400	English zinc, 19*l.* per ton. Belgian zinc, 18*l.* per ton. Same quality.
		1889	1,240	Belgium - -	570	
		1894	900	Belgium - -	560	

No.	Commodity.	Year.	Total Value of Importation into Malta from all Countries.	Value of Importations from Foreign Countries.		Remarks.
			£		£	
41	Musical instruments: Pianos and Harmoniums.	1894	680	Germany - -	250	No information for earlier years.
				France - -	130	
				Total - -	380	
42	Oil and floor cloth -	1884	400	- - -	Nil	
		1889	450	- - -	Nil	
		1894	1,180	Italy - -	190	
43	Oil seed: (*a*) Linseed oil, raw and boiled.	1884	2,100	Italy - -	100	English from 20*l.* to 23*l.* per ton. Italian from 40*l.* to 50*l.* per ton. The linseed oil imported from Italy is preferred, it being considered genuine, whilst the English is, as a rule, adulterated. English linseed oil is suitable for paints; the Italian is more suitable as a dressing for floors of Maltese stone slabs.
		1889	2,400	Italy - -	100	
		1894	2,570	Italy - -	200	
	(*b*) Cotton seed oil	1894	1,110	Germany - -	56	No information for earlier years. Foreign oil cheaper than the English. Cotton seed oil, being much cheaper than olive oil, and not being subject to duty, is imported to be mixed with olive oil and sold as such.
				France - -	260	
				Italy - -	150	
				Austria - -	300	
				Total - -	766	
43A	Olive oil - -	1884	37,390	France - -	391	Olive oil used to be imported on a very large scale from the coast of Tunis, Sicily, and Barbary to be re-imported in great quantities to the United Kingdom; the present importation of olive oil is for local use only. Superior and refined oil is imported bottled or in carafines from France and from the Riviera of Genoa.
				Italy - -	18,012	
				Turkish Empire -	5,116	
				Tunis - -	18,757	
				Total - -	37,276	
		1889	38,037	France - -	49	
				Italy - -	18,726	
				Austria - -	41	
				Turkish Empire -	9,943	
				Tunis - -	9,118	
				Total - -	37,877	
		1894	41,584	Italy - -	17,815	
				Turkish Empire -	13,838	
				Tunis and Greece -	9,903	
				Total - -	41,551	
44	Painters' colours and materials.	1884	3,800	Germany - -	60	English colours from 2*d.* to 1*s.* per lb.; French colours from 2½*d.* to 1*s.* 3*d.* per lb.; Italian colours from 2*d.* to 4*d.* per lb.; Austrian colours from ¾*d.* to 1½*d.* per lb.; German colours from 2½*d.* to 6*d.* per lb. English colours superior to the foreign. Oil paints of English manufacture preferred, though die sinkers prefer Austrian colours. Aniline colours come principally from Germany. English packing superior. Oil paints purporting to come from the United Kingdom are now imported from Genoa. Some Italian houses have lately tried to imitate the English kegs, but not have succeeded as yet.
				France - -	190	
				Italy - -	750	
				Austria - -	100	
				Total - -	1,100	
		1889	3,950	Germany - -	80	
				France - -	180	
				Italy - -	780	
				Austria - -	120	
				Total - -	1,160	
		1894	4,485	Germany - -	400	
				France - -	170	
				Italy - -	800	
				Austria - -	115	
				Total - -	1,485	

No.	Commodity.	Year.	Total Value of Importation into Malta from all Countries.	Value of Importations from Foreign Countries.		Remarks.
45	Paper:		£		£	
	(a) Printing -	1894	662	Italy - -	356	Notes already given.
				Austria - -	190	
				Total - -	546	
	(c) Writing -	1894	1,780	Germany - -	130	The superior quality is principally imported from the United Kingdom, and to some extent also from France and Germany; the common quality from Italy and Austria.
				France - -	50	
				Italy - -	200	
				Austria - -	120	
				Total - -	500	
46	Pickles and sauces	1884	4,000	- - -	Nil	Common pickles are prepared locally. The superior quality of pickles and of all other articles preserved in vinegar come from the United Kingdom, except tomato sauce and preserves which are imported at a cheap price from Sicily.
		1889	4,000	- - -	Nil	
		1894	3,815	France - -	200	
				Italy - -	315	
				Total - -	515	
46A	Vinegar - -	1884	834	Italy - - -	634	Common vinegar is manufactured locally out of the lees of sour beer and of wine, and out of grapes of local produce. White and superior vinegar is imported in small quantities from England and from France.
				Austria - -	9	
				Tunis - -	22	
				Total - -	665	
		1889	609	Turkish Empire -	48	
				Russia - -	433	
				Total - -	481	
		1894	258	Italy - - -	95	
				Turkish Empire -	35	
				Total - -	139	
48	Plate and Plated Ware:					
	(a) Silver Ware -	1894	3,000	Germany - -	1,500	No information for earlier years. Articles of silver for the use of churches come principally from Rome, Germany, and France. Those for household and other purposes are imported exclusively from Germany, their price being so low that similar articles from other countries cannot compete with them.
				France - -	650	
				Italy - -	190	
				Total - -	2,340	
	(b) Plated ware	1884	500	- - -	Nil	Plated articles come principally from Germany, their price is cheaper than that of similar articles imported from other countries, and they are consequently preferred.
		1889		No information.		
		1894	697	Germany - -	390	
				France - -	90	
				Italy - -	67	
				Total - -	547	
	(d) Jewellery and personal ornaments.	1894	9,000	Germany - -	4,500	Jewellery and personal ornaments are principally imported from Germany, England, and France; those coming from Italy, especially from Turin and Milan, are preferred to the German and French, on account of their solid workmanship and of the good quality of the stones, and as being an imitation of the English style. Jewels are also fairly mounted locally. Brilliants from Brazil are scarcely ever traded in; those from the Cape of Good Hope are more in use. They are prepared in Paris, Antwerp, Amsterdam, and in England. Those prepared in England and Holland are the best, but those from Antwerp are cheaper, and consequently more in use. The qualities of precious stones principally imported in Malta are those which go by the name of "Rose or Bozette," and those styled "Flat," or six-faced diamonds. Pearls from the Persian Gulf, and rubies, sapphires, and emeralds from Calcutta, Ceylon, and Burmah are imported through London. The rubies and sapphires from Burmah, known as "Cat's-eye," are preferred to brilliants.
				France - -	1,960	
				Italy - -	570	
				Total - -	7,030	

No.	Commodity.	Year.	Total Value of Importation into Malta from all Countries.	Value of Importations from Foreign Countries.		Remarks.
			£		£	
49	Provisions not otherwise described.	1894	14,838	Italy - -	3,100	Preserved and smoked hams, bacon, and lard are largely imported for local consumption from America viâ Liverpool, and also from the United Kingdom. The American provisions are inferior to the English, and cheaper. Lately, other sorts of potted provisions and fruits of all sorts have been introduced by English houses, and meet with a ready sale. Italian provisions are to some extent competing with the English, but the latter are always preferred.
				Austria - -	800	
				America - -	3,000	
				Total - -	6,900	
52	Seeds of all sorts: (*a*) Potatoes -	1884	4,290	France - -	1,400	
				Austria - -	1,500	
				Total - -	2,900	
		1889	5,041	France - -	970	
				Italy - -	1,200	
				Austria - -	1,300	
				Total - -	3,470	
		1894	19,170	France - -	1,300	
				Italy - -	1,200	
				Austria - -	1,900	
				Total - -	4,300	
	(*b*) Cotton seeds -	1884	20,090	Italy - -	9,730	
				Turkish Empire -	8,430	
				Greece - -	1,930	
				Total - -	20,090	
		1889	18,470	Italy - -	12,500	
				Turkish Empire -	3,960	
				Greece - -	2,010	
				Total - -	18,470	
		1894	19,005	Italy - -	12,630	
				Turkish Empire -	4,215	
				Greece - -	2,160	
				Total - -	19,005	
	(*c*) Hemp seed -	1884	1,540	Italy - -	950	
				Turkish Empire -	590	
				Total - -	1,540	
		1889	1,725	Italy - -	994	
				Austria - -	31	
				Turkish Empire -	700	
				Total - -	1,725	
		1894	1,882	Italy - -	1,010	
				Turkish Empire -	672	
				Greece - -	200	
				Total - -	1,882	
53	Silk, thrown, twist, and yarn.	1894	700	France - -	300	Silk is imported as a rule from France and Italy. Twist and yarn are imported from Naples and from France. There being no silk factories in Malta, raw silk is not imported.
				Italy - -	400	
				Total - -	700	

No.	Commodity.	Year.	Total Value of Importation into Malta from all Countries.	Value of Importations from Foreign Countries.		Remarks.
			£		£	
54	Silk manufactures :					
	(*a*) Broad piece goods.	1884	1,450	Italy - -	1,450	Imported from Como for ladies' dresses and faldettas.
		1889	1,470	Italy - -	1,470	
		1894	1,480	Italy - -	1,430	
	(*b*) Silk manufactures other than broad piece goods.	1894	9,160	Germany - -	3,500	Damask used for churches comes principally from Genoa; brocade and other silk stuffs used for upholstery is imported from Italy and France. The superior qualities of brocade variegated with gold come from France, and the ordinary quality from Italy. Superior silk ribbons, velvet, and lace come from St. Etienne in France; the ordinary quality from Switzerland and Germany. Silk piece goods for sieves used for sifting flour, known as Swiss silk, are imported in small quantities from Switzerland, England, and France. Spain supplies the superior quality of silk for fishing lines.
				France - -	2,300	
				Italy - -	1,800	
					7,600	
56	Soap :					
	Soap, common -	1884	3,214	Tunis - -	700	Soap for the laundry is principally manufactured in the local factories; it is, however, also imported in considerable quantities from Tunis and Candia. The softer quality comes from Tripoli and other Barbary states.
				Turkish Empire -	2,090	
				Total - -	2,790	
		1889	1,551	Turkish Empire -	1,338	
		1894	3,425	Turkish Empire -	820	
				Tunis - -	480	
				Total - -	1,300	
	Toilet soap - -	1884	685	- - -	Nil	The superior quality of toilet soap comes from England. That imported from France comes next, the most common being that imported from Germany, which is the cheapest.
		1889	No complete information.			
		1894	982	Germany - -	300	
				France - -	150	
				Italy - -	150	
				Total - -	600	
57	Spirits -	1884	16,002	France - -	1,150	The best quality of alcohol is imported from the United Kingdom; its importation is, however, small on account of its high price. The principal importation of the article is from Germany, Trieste, and Italy.
				Italy - -	1,572	
				Belgium - -	1,585	
				Austria - -	1,053	
				Turkish Empire -	71	
				Other countries -	181	
				Total - -	5,612	
		1889	23,071	Germany - -	463	
				France - -	2,854	
				Italy - -	917	
				Belgium - -	2,444	
				Austria - -	9,808	
				Turkish Empire -	224	
				Other countries -	355	
				Total - -	17,065	
		1894	88,932	Germany - -	1,261	
				France - -	2,951	
				Italy - -	677	
				Belgium - -	6,107	
				Austria - -	17,743	
				Turkish Empire -	264	
				Other countries -	176	
				Total - -	29,179	

Methylated spirits come in very small quantities from England.

The principal spirituous liquors imported are the following :—

Scotch and Irish whisky which are considered the best of the kind, the ordinary quality being imported from Germany.

Cognac.—The best from Bordeaux and its environs, and from the United Kingdom; the inferior quality comes in large quantities from Germany and Trieste.

Rum comes from England, Germany, and Trieste; the greater part of that imported from England is, however, prepared in Germany. The superior quality of rum is from America, and is imported either direct or through England, France, and Germany. The inferior quality, known as "New England," is also imported from America.

The other kinds of spirituous liquors which are not so much in use are imported as follows :—

Old Tom from the United Kingdom.

Absinthe from France.

Gin from Holland.

Mastica.—The superior quality from Scio and Constantinople, the inferior quality from France and Tunis.

Spirits of well-known firms are constantly imitated, notably Exshaw's and Hennessy's brandies.

MALTA.

No.	Commodity.	Year.	Total Value of Importation into Malta from all Countries.	Value of Importations from Foreign Countries.		Remarks.
			£		£	
57A	Wine - -	1884	137,506	France - -	5,288	Common wine comes in large quantities from Sicily and Greece (Santorino), and is sold at about 1s. 2d. per Imperal gallon duty paid. A small quantity of superior wine is imported from France, Algiers, and Germany, and from Northern Italy and Spain. The importation of superior Spanish wines is very limited. Genuine Port wine is very rare, but Spanish wines from Tarragona and Alicante are sold as such. Other kinds of wine, such as "San Raffaele," "Vermouth," "Orange wine," &c. come from Turin, Bastia, France, Germany, and Spain.
				Italy - -	114,599	
				Austria - -	17	
				Turkish Empire -	463	
				Greece and Tunis -	10,119	
				Total - -	130,486	
		1889	175,024	France - -	4,378	
				Italy - -	163,337	
				Belgium - -	96	
				Austria - -	94	
				Turkish Empire -	1,235	
				Greece and Tunis -	1,641	
				Total -	170,781	
		1894	135,848	Germany - -	58	
				France - -	8,340	
				Italy - -	116,840	
				Belgium - -	57	
				Austria - -	51	
				Turkish Empire -	3,711	
				Greece - -	9,353	
				Total - -	138,405	
58	Stationery, other than paper.	1894	1,210	France - -	300	The superior quality of stationery is imported from the United Kingdom. An inferior quality is imported from France and Italy, and is cheaper than the English.
				Italy - -	410	
				Total - -	710	
60A	Marble - -	1884	1,850	Italy - -	1,850	
		1889	1,300	Italy - -	1,300	
		1894	2,700	Italy - -	2,700	
61	Sugar, refined - -	1884	35,152	France - -	1,900	Lump sugar and other qualities of refined sugar are imported principally from England, and in small quantities also from France, Holland, and Belgium. White sugar from Trieste is used chiefly in the towns and their suburbs. It is not, however, well suited to be made the object of commercial speculation because after some time it becomes moist and loses its colour. Brown sugar which is consumed by the lower classes is imported in large quantities, and in a proportion greater than that of the other qualities of sugar.
				Belgium - -	3,090	
				Austria - -	10,000	
				Turkish Empire -	428	
				Holland, viâ Antwerp and London	4,310	
				Total - -	19,728	
		1889	39,520	France - -	1,600	
				Belgium - -	2,400	
				Austria - -	14,500	
				Holland, viâ Antwerp and London	3,930	
				Total - -	22,430	
		1894	34,572	France - -	1,000	
				Belgium - -	470	
				Austria - -	20,000	
				Holland, viâ Antwerp and London	1,830	
				Total - -	23,300	
67	Woollen and worsted manufactures: (a) Woollen tissues	1894	2,920	Germany - -	590	Woollen tissues come principally from Bradford and Leeds, but they are also imported in considerable quantities from foreign countries. The best quality of these articles is imported from England and France; the English, however, are preferred, being cheaper than French goods of the same quality. The ordinary quality is principally imported from Germany and Italy, and competes favourably with English goods of the same kind. No information for earlier years.
				France - -	530	
				Italy - -	260	
				Austria - -	100	
				Other countries -	110	
				Total - -	1,590	

No.	Commodity.	Year.	Total Value of Importation into Malta from all Countries.	Value of Importations from Foreign Countries.		Remarks.
67	Woollen and worsted manufactures—*cont.*		£		£	
	(*b*) Worsted coatings, broad, all wool, and mixed.	1894	650	Germany France Italy Total	130 120 100 350	Coloured merino all wool, black and brown cashmere, and other qualities of French twills come principally from Rheims. Wool mixed with cotton, especially the "union" is imported from the United Kingdom.
	(*c*) Flannels	1894	6,290	Germany France Italy Total	490 280 170 890	The best quality of flannels is furnished by England and France; Germany is, however, competing advantageously with both.
	(*d*) Blankets	1884	510	Tunis	230	
		1894	700	Tunis France Total	110 290 400	
	(*f*) Carpets and druggets.	1894	800	Germany Belgium Total	140 200 340	
68	Yarn, alpaca, and mohair, &c.	1894	570	France Other countries Total	150 260 410	Yarn and alpaca are imported from the United Kingdom. German wool mohair of Angora is not imported; a light stuff used for ladies dresses made up of a mixture of wool and cotton, improperly called mohair, comes principally from France.

CYPRUS.

No. 31.

SIR W. J. SENDALL to MR. CHAMBERLAIN.
(Received May 12, 1896.)

SIR, Government House, Cyprus, May 1, 1896.

WITH reference to your Despatch of the 28th November 1895, on the subject of the extension of British trade with its Colonies, I have the honour to transmit reports prepared by the Chief Collector of Customs on paragraphs 3 and 4 of that Despatch.

2. Mr. Ashmore explains that he does not himself possess the technical knowledge required to enable him to furnish a report embracing all the points referred to in the Despatch, and he is not acquainted with any one in Cyprus who has such technical knowledge.

3. He has also no means of arriving at accurate information concerning the wholesale prices of imported goods, for the local merchants, who are nearly all Greeks or Arabs, are not willing to place at his disposal their business information.

4. I regret also that some of the particulars wished for cannot be given owing to commodities imported not being classified in many instances in detail.

5. It is, however, desirable to bring to your notice that the reports on woollen manufactures, leather, earthenware, and chinaware, and hardware and cutlery, are deserving of special attention on the part of manufacturers and exporters.

CYPRUS.

7. Certain patterns and samples, a list of which is attached,* have been forwarded in accordance with the directions conveyed in your Despatch, to the London Chamber of Commerce.

I have, &c.,
WALTER J. SENDALL,
High Commissioner.

Enclosure in No. 31.

The Hon. the CHIEF SECRETARY, Nicosia, April 23, 1896.

I HAVE the honour to forward my report on Mr. Chamberlain's Circular Despatch of the 28th November 1895, with a list of samples sent to the London Chamber of Commerce.

2. The report is, I regret to say, of little value for the purpose required. I have not, nor has any person in Cyprus with whom I am acquainted, the technical knowledge required for the drafting of such a report, nor have I any trustworthy means of arriving at accurate knowledge of the wholesale prices of imported goods, which are consistently misrepresented to my department.

3. The local merchants, who are nearly all Greeks or Arabs, are not very willing to place their business information at the disposal of an officer, part of whose business it is to pronounce on the values of goods in connexion with ad valorem duties.

4. If I correctly understand the object of the Despatch, what is required is not "general" but "particular" information which might prove useful to merchants who desire to import. That being so, I refrain from offering any general remarks as to the reasons which appear to me to prejudice the prospects of British trade with Cyprus.

5. Two boxes of patterns or samples have been forwarded to the London Chamber of Commerce.

A. M. ASHMORE,
Chief Collector of Customs.

Annexure 1. Return required by 3 (*a*) of the Despatch.
" 2. Reports " 4 " "
" 3. List of patterns and samples forwarded to the London Chamber of Commerce.

ISLAND OF CYPRUS.

IMPORTS.

No.	Commodity.	Total Value of Imports.			Value of Imports from Foreign Countries.				Remarks.
		1884–85	1889–90	1894.	Country.	1884–85	1889–90	1894.	
		£	£	£		£	£	£	
4	Arms and ammunition:								
	(*a*) Fire arms, small.	420	126	80	Turkey -	140	17	15	See separate note.
					Egypt - -	92	21	12	
					Austria -	43	14	3	
					France - -	—	59	—	
					Greece -	—	—	2	
					Germany -	—	—	3	
	(*b*) Gunpowder -	834	1,226	586	Greece -	831	1,167	453	See separate note.
					Egypt - -	1	2	—	
					Turkey -	—	3	—	
					France - -	—	1	—	
	(*c*) Other (shot, &c.)	577	630	611	France -	375	341	54	See separate note.
					Turkey -	115	27	18	
					Egypt - -	11	4	28	
					Austria -	9	99	141	
					Greece -	—	57	88	
					Italy - -	—	75	183	
5	Bags, empty -	2,175	3,901	4,175	Turey - -	85	739	224	These are all jute Indian made bags.
					Egypt - -	138	1,674	1,099	
					France -	134	111	368	Many of course are returned empties.
					Austria -	18	40	161	
					Roumania -	—	1	—	

* Not printed.

No.	Commodity.	Total Value of Imports.			Value of Imports from Foreign Countries.				Remarks.
		1884–85	1889–90	1894.	Country.	1884–85	1889–90	1894.	
		£	£	£		£	£	£	
6	Beer and ale	5,211	5,856	4,127	Egypt	654	125	10	The English beer imported is for the troops, and the reduction is due to the diminution of numbers. So far as beer is used by the native population, light Austrian has the preference. In a wine producing country there is little opening for a beer trade.
					Austria	297	557	242	
					France	—	11	—	
					Turkey	—	2	1	
					Belgium	—	—	10	
9	Books, printed	1,026	884	1,248	Turkey	549	356	416	Imported books are mostly printed in Greek and Turkish, the English language is scarcely spoken outside official circles. The English books imported are for the officials, and for schools.
					Egypt	59	32	20	
					Austria	55	5	30	
					France	36	131	113	
					Greece	58	94	415	
					Italy	48	32	15	
					Roumania	21	12	—	
					Germany	—	—	2	
10	Butter	7,113	5,673	7,710	Turkey	5,252	4,422	4,781	The butter imported from the United Kingdom is tinned butter for the use of the well-to-do classes, of the kinds well known in the English export provision trade. The other imports are common native butter made of goats', sheep, and cows' milk, and kept in skins. It is used for cooking purposes, and is acceptable to the native taste for coarse, rank, greasy food.
					Egypt	186	179	1,410	
					Austria	885	188	473	
					Italy	32	55	32	
					Russia	67	160	111	
					Roumania	56	21	—	
					France	—	1	—	
					Greece	—	6	1	
15	Cheese	1,055	575	882	Turkey	611	119	151	The United Kingdom imports are for the use of the troops, and a little for English officials. The rest is common native-made cheese, made of goats' milk and suited to native taste.
					Egypt	42	12	83	
					Austria	52	8	6	
					France	22	7	5	
					Greece	2	3	4	
					Italy	17	34	17	
					Roumania	—	164	189	
					Russia	—	1	—	
					Bulgaria	—	—	192	
19	Coal	2,587	1,227	1,770	Turkey	12	3	3	All coal imported is of British origin, but there is a small quantity of French patent fuel imported.
					Egypt	106	345	1,475	
					Spain	8	—	—	
					France	—	—	182	
					Italy	—	—	2	
18	Clocks (nominal). Watches are classified in Cyprus under jewellery.	679	487	921	Turkey	363	55	273	Very few clocks are imported. Watches are mostly from Switzerland and Germany, the former coming through France. The reasons which enable Swiss and German watches to compete successfully with English-made watches are well known, and need not be enlarged on here.
					Egypt	51	34	129	
					Austria	169	173	18	
					France	43	23	181	
					Italy	—	3	1	
					Greece	—	—	1	
					Switzerland	—	—	26	
					Germany	—	—	59	
					United States	—	—	4	
21	Corn:								
	Wheat	455	1,852	9	Turkey	405	1,852	4	Cyprus is a grain-exporting country, and imports are only made in exceptionally bad years.
					Egypt	50	—	5	
	Vetches	125	890	169	Turkey	125	885	124	
					Egypt	—	5	—	
					France	—	—	45	
23	Cotton manufactures (all sorts of cotton goods).	44,918	36,072	25,252	Turkey	16,429	9,309	5,295	See separate note.
					Egypt	357	138	99	
					Austria	2,003	1,251	2,050	
					France	145	739	331	
					Greece	25	2	95	
					Italy	12	2	197	
					Belgium	—	—	27	
					Germany	—	—	17	

CYPRUS.

No.	Commodity.	Total Value of Imports.			Value of Imports from Foreign Countries.				Remarks.
		1884–85	1889–90	1894.	Country.	1884–85	1889–90	1894.	
		£	£	£		£	£	£	
24	Earthen and chinaware (including glassware).	5,329	2,666	4,605	Turkey -	996	1,031	951	See separate note.
					Egypt -	155	183	156	
					Austria -	2,427	582	1,204	
					France -	1,116	432	477	
					Greece -	4	30	428	
					Italy -	57	—	26	
					Roumania -	—	1	33	
					Belgium -	—	—	537	
					Germany -	—	—	401	
25	Fish, herrings, &c.	3,675	2,250	2,654	Turkey -	972	945	1,086	Herrings cannot be separated from fish in our returns; but the imports from Turkey and Greece are mostly sardines, eels, and Black Sea fish.
					Egypt -	288	49	180	
					Austria -	6	—	—	
					France -	39	42	—	
					Greece -	692	—	76	
					Italy -	28	—	1	
26	Furniture - -	1,927	1,191	1,654	Malta -	29	—	—	See separate note.
					Turkey -	264	194	333	
					Egypt -	383	350	228	
					Austria -	768	174	565	
					France -	271	90	99	
					Greece -	21	—	73	
					Italy -	—	61	4	
					Roumania -	—	13	—	
					Belgium -	—	—	128	
					Germany -	—	—	30	
27	Glassware (included under earthen and chinaware).								
29	Haberdashery and millinery.	2,710	2,094	4,360	Turkey -	1,499	984	1,869	See separate note.
					Egypt -	45	17	23	
					Austria -	385	77	521	
					France -	60	16	525	
					Greece -	4	—	27	
					Italy -	3	11	—	
					Switzerland -	—	—	1	
					Germany -	—	—	10	
					United States	—	—	4	
30	Hardware and cutlery.	2,926	1,925	2,062	Malta -	8	—	—	See separate note.
					Turkey -	1,329	741	533	
					Egypt - -	593	69	58	
					Austria -	407	479	309	
					France - -	111	183	383	
					Greece -	38	4	5	
					Roumania -	—	1	—	
					Italy - -	—	—	1	
					Germany -	—	—	286	
					Belgium -	—	—	37	
34	Leather: (a) Unwrought -	13,933	8,499	10,718	Turkey -	473	1,101	693	See separate note.
					Egypt -	1,435	2,010	3,267	
					Austria -	412	410	297	
					France -	4,947	3,290	4,543	
					Greece -	5,824	701	468	
					Italy - -	—	95	771	
36	Linen manufactures.	2,650	1,067	807	Turkey -	699	287	232	The linen manufactures from Turkey are English imported viâ Constantinople and Smyrna. The total foreign import is therefore less than 5 per cent. of whole.
					Austria -	560	25	29	
					Malta - -	2	—	—	
					Egypt -	7	13	13	
					France -	36	112	54	
					Italy - -	1	20	43	
					Belgium -	—	—	25	
37	Machinery, all sorts	2,017	1,035	2,316	Turkey -	139	41	673	See separate note.
					Egypt -	560	49	81	
					Austria -	358	213	206	
					France -	38	17	291	
					Greece and Italy.	18	3	3	
					Roumania -	—	87	—	
					Belgium -	—	—	32	
					Germany -	—	—	64	

No.	Commodity.	Total Value of Imports.			Value of Imports from Foreign Countries.				Remarks.
		1884–85	1889–90	1894.	Country.	1884–85	1889–90	1894.	
		£	£	£		£	£	£	
39	Medicines and medical appliances.	1,187	784	1,460	Turkey -	478	236	347	See separate note.
					Egypt - -	46	142	124	
					Austria -	152	127	82	
					France -	293	78	523	
					Greece and Italy.	3	6	20	
40	Metals :								
	Iron : Bars, rods, hoops, plates and sheets, and *steel*.	3,378	1,737	3,488	Turkey -	4	41	19	Separate note.
					Egypt - -	15	87	—	
					Austria -	103	102	171	
					France -	48	24	—	
					Greece - -	3	—	—	
					Germany -	—	—	148	
					Sweden -	—	—	1,152	
					Belgium -	—	—	1,328	
	Iron manufactures	3,837	1,823	3,568	Turkey -	579	233	181	Separate note.
					Egypt - -	371	213	183	
					Austria -	340	263	237	
					France -	350	323	510	
					Roumania -	—	3	—	
					Greece -	—	—	2	
					Belgium -	—	—	479	
					Germany -	—	—	97	
	Copper bottoms -	2,985	500	1,306	Turkey -	—	—	98	Separate note.
	,, pans, &c.	1,409	418	406	Austria -	1,261	537	338	Separate note.
					Egypt - -	19	12	14	
					Turkey -	128	69	53	
45	Paper (see Stationery).								
46 49	Provisions not otherwise described.	18,418	12,877	9,099	Turkey -	8,657	6,602	1,495	That from United Kingdom is for the troops, and a small quantity of tinned goods, and bacon and ham, &c. for English residents. The imports from Turkey are olive oil; and from Egypt rice, some of which is Indian. The details are not distinguished in our returns.
					Egypt -	1,146	2,266	4,205	
					Austria -	643	792	295	
					France -	395	319	342	
					Greece -	134	75	42	
					Italy - -	138	55	40	
					Russia -	83	32	—	
					Germany -	—	—	1	
54	Silk manufacture -	3,723	2,904	3,138	Turkey -	2,081	1,287	1,385	The English and Turkish importations are reported to be all French, or nearly so.
					Malta -	6	—	—	
					Egypt -	94	93	59	See separate note.
					Austria -	209	136	359	
					France -	127	160	665	
					Greece -	16	1	14	
					Italy - -	2	—	13	
					Germany -	—	—	16	
56	Soap - -	6,740	7,189	6,849	Turkey -	6,484	6,825	6,429	This is common cheap olive oil soap, of which samples are sent.
					Egypt -	35	185	16	
					France -	13	7	12	
					Greece, &c. -	6	—	170	
					Austria -	—	5	40	
					Italy - -	—	59	41	
57	Spirits (brandy, whiskey, gin, rum, &c.).	4,232	3,191	1,102	Turkey -	285	181	70	Cyprus is an exporter of common native spirit, and the manufacture is increasing. The imports have been reduced by an increase in the tariff in 1893. The imports are for the troops and English residents. The French imports are French brandy etc.
					Egypt -	233	258	17	
					Austria -	2,192	1,002	28	
					France -	536	697	232	
					Italy - -	6	19	—	
					Russia -	144	—	—	
					Greece -	—	1	39	
58	Stationery, all sorts (for cigarette papers, *see* below).	2,805	2,418	2,172	Turkey -	517	235	269	Separate note.
					Egypt -	44	39	72	
					Austria -	767	1,179	1,111	
					France -	206	279	291	
					Greece -	1	13	9	
					Italy - -	1	35	26	
					Roumania -	—	26	—	
					Belgium -	—	—	15	
					Germany -	—	—	20	

No.	Commodity.	Total Value of Imports.			Value of Imports from Foreign Countries.				Remarks.
		1884–85	1889–90	1894.	Country.	1884–85	1889–90	1894.	
		£	£	£		£	£	£	
(45)	Cigarette paper -	1,406	1,248	1,524	Turkey -	150	8	2	Separate note.
					Austria -	999	1,002	951	
					France -	257	227	516	
					Egypt -	—	11	55	
61	Sugar, refined -	14,074	11,331	11,171	Turkey -	496	19	25	The whole import is cheap beet sugar of Austrian manufacture.
					Egypt -	634	189	440	
					Austria -	11,954	10,872	10,648	
					France -	249	169	—	
					Greece -	103	—	—	
					Italy - -	—	46	1	
64	Wood and timber, manufactured: Staves and empty casks.	5,868	9,687	5,976	Turkey -	1,688	1,550	2,002	The import of wood is and must be from Turkey. It is brought over in small native craft from the neighbouring coast. The imports from other countries are wine casks returned empty.
					Egypt -	3,549	3,008	3,618	
					Austria -	102	28	148	
					France -	527	5,079	—	
					Italy - -	2	1	2	
					Greece -	—	26	—	
67	Woollen manufactures, all sorts. (No means of separating these.)	17,034	13,154	20,328	Turkey -	4,173	1,908	2,870	Separate note.
					Egypt -	546	333	332	
					Austria -	8,090	1,634	4,441	
					France -	1,001	1,545	961	
					Greece -	1,941	1,085	1,752	
					Italy - -	24	72	403	
					India -	—	—	1	
					Belgium -	—	—	1,260	
					Germany -	—	—	891	

4. ARMS AND AMMUNITION:

(*a*) *Firearms, small.*—This trade has been destroyed by restrictions on import imposed in the interests of order.

(*b*) *Gunpowder.*—A large proportion of the gunpowder imported, though brought from Greece, is of British manufacture. A proportion is now of Greek manufacture, said to be made in the Piræus, and to cost about 15 per cent. less than English-made gunpowder.

Greece, being the centre of an illicit smuggling trade in gunpowder into Turkey, and Cyprus merchants being all Greek-speaking, the trade naturally falls into the hands of Greek houses.

(*c*) *Shot* is said to be produced more cheaply in Italy and in Austria than in the United Kingdom.

A small quantity of Italian and Austrian shot has been purchased as samples.

23. COTTON MANUFACTURES: *Explanation of the figures.*—The imports from Turkey are mostly English-made goods, and a little German.

The reduction in the quantity is attributed to bad times, but is in a much larger degree due to an accumulation of unsold goods in the island, due to speculative imports in past years.

English-made goods are preferred, and, as far as can be ascertained, other imports are maintained principally because foreign merchants give credit, but English will not.

Foreign firms give four to six months' credit, and often allow 10 to 30 per cent. discount on invoice values.

The Manchester firms trading with Cyprus bear Greek names.

24. EARTHEN AND CHINA WARE, INCLUDING GLASS WARE:

(*a*) Austrian ware is cheaper, but of inferior quality.

Information as to wholesale prices cannot be obtained.

(*b*) and (*c*) Cheapness, not quality, is the ruling factor.

A few specimens, with the prices at which they are sold wholesale, will give an idea of the low prices at which these things can be sold.

(*f*) In this trade the per-centage of breakages is said to constitute a material consideration as affecting price, and it is understood that, whether through defective packing, or perhaps from a longer and more difficult sea voyage, the United Kingdom compares unfavourably with Mediterranean countries in this respect.

26. FURNITURE.—The English-made imported furniture is mostly for the officials.

Very cheap and rough furniture of a kind never seen or made in England, but commonly used by the poorer classes throughout the Levant, and Austrian bentwood furniture make up the imports, though a good deal of rough cheap furniture is made in the country.

The standard of comfort even among well-to-do Cypriots is so low that there is no market for expensive furniture.

29. HABERDASHERY AND MILLINERY.—English imports have increased, and a good deal of the material imported from Turkey is English made.

That imported from Austria and France is women's dress material, corsets, &c., French goods of this kind being, in the Mediterranean as elsewhere, preferred to English.

A detailed report on haberdashery and millinery is not within the capacity of the writer.

30. HARDWARE AND CUTLERY.—Imports from Austria, France, Germany, and Belgium exceeds, as they should not do, imports from the United Kingdom; but the greatest part of the Turkey imports are English cheap goods.

English goods are admittedly the best, but they are dearer than Austrian, French, and German.

Specimens of a few of the articles imported from foreign countries have been obtained, and their wholesale prices are quoted.

34. LEATHER, UNWROUGHT.—There is a great falling off in the United Kingdom imports, which have suffered for the benefit of French trade. Both are fine sole leather for use in the boot trade, which is a large trade in Cyprus. The English leather is admitted to be the strongest, but it is hard to work, and the native makers therefore give the preference to the inferior but more easily wrought French leather. It may be added that French *soft leather* is more comfortable to wear in a hot dry country than English.

A marked feature of this return, though not affecting the present question, is the increase in the imports from Egypt, whose tanneries are said to have been greatly improved, and which produces very cheap leather.

The Greek trade, so large in 1884–85, was one which passed through Cyprus on its way to Roumania, the circuitous route being taken to obtain Cyprus certificate of origin.

Specimen of French and Italian sole leathers, with their cost prices free on board at the port of origin, are forwarded.

37. MACHINERY.—The United Kingdom imports are mostly boilers and cotton gins.

The Turkish import of 1894 was a single oil-press from Smyrna.

There might be an opening for agricultural machinery in Cyprus, but if introduced it will probably have to be at the instance of the government, there being practically no rich landed proprietor to experiment.

The imports from Continental countries are mostly sewing machines which, though of inferior quality, are cheaper than English machines. There is also some wine machinery imported from France.

39. MEDICINES AND MEDICAL APPLIANCES:

A Special Report by the Chief Medical Officer.

It is quite true that drugs, surgical appliances, &c., are almost exclusively imported into Cyprus from France, and even the few essentially English pharmaceutical products which find their way here are imported through French houses, and the reason is, as it is for many other articles which are imported and retailed by small traders, that there exists no commercial communication direct with the centres of manufacture, but orders are given to and through commercial travellers representing French houses at frequent and regular intervals. Owing to the inferior goods supplied they are able to give them at very low prices; facilities are also given for payment. I have been for some time trying to persuade the chemists to improve their stocks by obtaining from England genuine products, but the difficulties they find in getting their orders executed and the cost of shipment, &c., have hitherto prevented them from doing so. One, however, has on my suggestion, entered into communication with an English firm and his stock is almost exclusively English. It is, however, to be regretted that English houses do not

CYPRUS. make a bid to introduce their trade here, as with the exception of some stray catalogues which find their way here now and then, there has been no other encouragement to induce orders, and no commercial travellers has ever been sent to represent them.

F. HEIDENSTAM,
C.M.O.

So long as Cyprus medical students go to study in France in preference to England, French drugs are likely to be preferred to English.

40. METALS:

Report by O. C. of Public Works Department.

I have the honour to report as follows:—

Swedish iron is sold in Nicosia at $2\frac{20}{40}$ c.p. the oke (A)
English " " $1\frac{35}{40}$ " (B)
Belgian " " $1\frac{30}{40}$ " (C)

Swedish iron is used for making horse shoes and nails for horse shoes and villagers boots and all other light class of blacksmiths work.

Belgian iron is preferred by the merchants as they find it cheaper than the English iron, but it is of an inferior quality. This iron is known by the native blacksmiths under the name of English iron.

Samples of each kind of the above-mentioned iron have been obtained without incurring any cost.

JAS. CUNNINGHAM,
O.C. P.W.D.

		£	s.	d.	
* (A)	$2\frac{20}{40}$ c.p. the oke represents	11	2	3	the ton.
* (B)	$1\frac{35}{40}$ " "	8	6	8	"
* (C)	$1\frac{30}{40}$ " "	7	15	7	"

The apparent great reduction of English imports is not entirely due to an increased use of the foreign sorts, but also to the fact that formerly the foreign kinds were imported viâ English ports and are now shipped direct.

40. COPPER PANS.—Big pans are imported from Austria, but the importation is stated to be no longer profitable and to be diminishing.

They are now made in this country from British copper bottoms.

A specimen of the smallest size in use is forwarded. It is of Cyprus manufacture.

67. WOOLLEN MANUFACTURES.—The use of tweed in Cyprus is increasing in consequence of woollen clothing gradually superseding the old costumes.

It will be observed that Austrian, Belgian, and German imports are making greater progress than those of the United Kingdom. The Belgian manufacture is said to have recently greatly improved. The materials from the United Kingdom are admittedly better, but also dearer than those of German and Belgian origin. Cheapness is absolutely essential here.

Samples have been procured and are forwarded, with the prices, &c.

58. STATIONERY.—The United Kingdom imports are stationery proper, mostly for Government. The Austrian imports consist of red paper used in making up packages of tobacco and cigarettes, and of cigarette papers.

Specimens with wholesale prices quoted are forwarded.

The French imports are cigarette paper and writing paper.

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* There are retail prices.

APPENDIX.

INDIA.

INDIA OFFICE to COLONIAL OFFICE.

(Received July 1, 1896.)

India Office, Whitehall, London, S.W.
July 1, 1896.

Sir,

I am directed by the Secretary of State for India to forward, for the information of Mr. Secretary Chamberlain, copy of the papers noted below,* regarding the effect of foreign competition on British trade with India.

I have, &c.,
A. GODLEY.

Enclosure 1 in Appendix.

My Lord, India Office, London, December 26, 1895.

I forward herewith, for the consideration of your Excellency's Government, copy of the papers noted below,† relative to the effect of foreign competition on the trade of India. The matter is of much importance, and I shall be glad to learn that you are prepared to give a return of the nature indicated.

I have, &c.,
George Hamilton.

To His Excellency the Right Honourable
the Governor-General of India in Council.

Chamber of Commerce and Manufactures, Sheffield,
December 5, 1895.

Sir,

My Council are permitted by Mr. Secretary Chamberlain to bring before the Secretary of State for India a suggestion which they made to the Colonial Office, but which Mr. Chamberlain points out he is unable himself to deal with.

You may be aware that Mr. Chamberlain is addressing to all the Colonial Governors a request for a Return showing how British trade has been affected by foreign competition, and also the reasons which have led Colonial importers to prefer foreign goods to those manufactured in this country.

You will, of course, understand that I am merely summarising in the baldest way the project of Mr. Chamberlain, which, in the opinion of my Chamber, is likely to be of the greatest possible value to British trade.

It seems to my Chamber, however, that the Report would be incomplete if it were confined only to Colonial trade, and they would venture most respectfully to urge upon the Secretary of State for India that he should take the same action and obtain a similar Report from the Indian Government.

The markets of India are of such supreme importance to the trade of this country, that my Council feel sure they may be pardoned for making this suggestion, which they hope will receive the favourable consideration of the Secretary of State.

I am, &c.,
Herbert Hughes,
Secretary.

Sir, India Office, December 24, 1895.

I am directed by the Secretary of State for India in Council to acknowledge the receipt of your letter of the 5th instant, in which you suggest that a return should be

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* Despatch to the Government of India, dated 26th December 1895, with enclosures.
Letter from the Government of India, dated the 26th May 1896, with enclosure.

† From Sheffield Chamber of Commerce, dated 5th December 1895.
To ditto, dated 24th December 1895.
Colonial Office Circular, dated 28th November 1895.

prepared similar to that in course of preparation in the British Colonies, showing how Indian trade has been affected by foreign competition, &c.

In reply I am to state that Lord George Hamilton is fully alive to the importance of the subject, and the Government of India will be directed to give your proposal careful and, if possible, favourable consideration.

I am, &c.,

HORACE WALPOLE.

Enclosure 2 in Appendix.

To the Right Hon. LORD GEORGE FRANCIS HAMILTON, Her Majesty's Secretary of State for India.

MY LORD, Simla, May 26, 1896.

WE have the honour to acknowledge the receipt of your Lordship's Despatch, dated the 26th December 1895, suggesting, at the instance of the Sheffield Chamber of Commerce and Manufactures, that a return should be prepared in this country similar to the return which is being prepared in the Colonies on the instruction of the Colonial Office, showing the effect of foreign competition on British trade with India.

2. As desired by your Lordship, we enclose a return prepared in accordance with the instructions given in the Colonial Office Circular, but slightly modified and enlarged with reference to the course of trade in India.

3. Her Majesty's Secretary of State for the Colonies desires to have with the return a discussion of the reasons which have induced importers to prefer in each case a foreign article to similar goods of British manufacture. These reasons are to be discussed under the following heads:—

Price.
Quality and finish (full particulars).
Suitability of the goods for the market, their style or pattern (specimens to be sent).
Difference of making up or packing.
False marking.

The last of these heads may be dismissed from consideration, with the remark that the Indian law relating to merchandise marks, which is in substance the same as the English law, prevents, or should prevent, the substitution of foreign for British goods under the disguise of false marking.

4. As regards the other heads, it will be evident to your Lordship that it would not be possible for us to discuss them as proposed without an elaborate preliminary investigation, conducted by the aid of commercial bodies, and with the assistance of importers. We do not gather that such investigation is suggested to us, and therefore we have deemed it unnecessary to undertake an inquiry which is more properly one for individual traders interested in particular business than for the Government. Some of the information required is moreover of such a nature that probably traders would object to communicate it to us. We can therefore only say generally in regard to certain articles that foreign goods are taken more largely than English goods, because they are either—

(1) more largely produced or manufactured on the Continent, or elsewhere, than in England;
(2) cheaper than English goods;
(3) more suitable, that is to say, the foreign goods are more adapted to the requirements, tastes, and even prejudices of Indian customers; or
(4) are Asiatic goods of a particular character not produced or manufactured in England, and not capable of being produced there in competition with the Asiatic countries whence they are imported into India.

(5.) It will be convenient here to enumerate in groups the more important articles mentioned in the return, specifying against them the reasons why imports from other countries than England are relatively large. (The numbers preceding the names of the articles are the numbers in the return.)

(2.) ANIMALS: *Horses.*—The principal sources of supply to India were formerly the littoral of the Persian Gulf and Cape Colony. The latter source of supply was

abandoned many years ago when a more convenient one was found in the Australian Colonies. Importations from England have always been rare and infrequent, the price being prohibitive.

(3.) APPAREL.—This term includes millinery, drapery, and haberdashery. A considerable proportion of the imports represent classes of articles in the manufacture of which France has special eminence. Those which are imported from other Continental countries are cheap, and much is imported from Asiatic countries of a special character.

(16.) MINERAL DYES.

(27.) BEADS AND FALSE PEARLS.

(57.) BRANDY.

(63.) WINES.

These are all articles of Continental rather than British manufacture, and there is no question of competition in respect of them. Beads of the class required in India were a monopoly of Venice, and though they are no longer so, they are not manufactured in England. Nor are the other articles, of which indeed England is a large importer, not a producer.

(12.) CAOUTCHOUC, MANUFACTURES OF.

(18.) CLOCKS AND WATCHES.

(23.) COTTON GOODS.

(24.) EARTHENWARE AND PORCELAIN.

(26.) CABINETWARE AND FURNITURE.

(27.) GLASS (sheet and plate).

(30.) HARDWARE AND CUTLERY.

(33.) INSTRUMENTS :—

(*a.*) *Musical.*
(*b.*) *Photographic.*
(*c.*) *Scientific, philosophical.*

(40.) IRON AND STEEL.

(45.) PAPER.

(54.) SILK GOODS.

(56.) SOAP.

(58.) STATIONERY.

(67.) WOOLLEN GOODS.

Many of this group of articles when of non-English manufacture and destined for Eastern markets are not so good in quality as English goods; but they are much cheaper. It is, for instance, well known to the India Office that Belgian iron and steel are of inferior quality. In Lord Cross' Financial Despatch No. 3, dated the 8th January 1891, it was enjoined on us that for public purposes only English metal should be purchased in consequence of the inferiority of Continental iron and steel. These metals are, however, regarded as sufficiently good by the Indian consumer, and, the goods being cheap, the displacement of English by Belgian iron and steel in recent years has been very marked.

American and Swiss watches and clocks of common and cheap quality are largely imported for the use of people who cannot afford to buy similar goods made in England.

Similar remarks apply to soap, to paper, and to some extent to stationery, though certain articles of stationery, such as pencils, seem to come exclusively now from Germany or Austria in supersession of English pencils, which at one time held the practical monopoly of the Indian market. Even the Store Department of the India Office supplies the Government Departments in India only with pencils made by Faber (Bavaria) and Hardtmuth (Vienna). These and American pencils hold the Indian market. From Germany also are imported a large proportion of the slates and slate pencils and educational appliances (kindergarten apparatus for instance) which we receive in India.

The cotton goods are generally of special or cheap sorts—mostly printed and coloured goods. The woollen goods also are of cheap descriptions. In both these

cases Continental shippers have long been trying to oust British manufactures of similar kinds, but not with much success. Of the imports of silk goods (unmixed) from foreign countries two-thirds are Chinese, Japanese, and Persian, which are very much cheaper than European silks. The mixed goods, which are also cheap, are imported mainly from the Continent, whence also is imported a considerable proportion of the better kinds of silk goods.

Much of the earthenware and porcelain is of a special kind, but that which is imported from Belgium and Germany is of an ordinary class intended for competition with English goods.

The cabinet-ware and furniture from Austria consists of the well-known bentwood articles which are not manufactured in England.

In sheet and plate glass—mostly common window glass—the manufacturers of Belgium are carrying on a vigorous and successful competition with England, the glass being cheaper and the quality not much inferior. The same remarks apply to "other glassware," mainly consisting of table glass and lamp-chimneys. The quality is useful enough for ordinary purposes, and as the articles are relatively cheap they are to be found everywhere. In these articles Germany and Austria compete with England as actively as Belgium.

The same three countries are thrusting their hardware and cutlery vigorously upon the Indian market. Although the articles are decidedly inferior, they are, being much cheaper than English cutlery and hardware, extensively used by natives.

Instruments (No. 33) are imported because in many cases they are of specially good quality and cheaper than English goods.

(6.) BEER.—This is not cheaper than English beer, but it is brewed of a very light kind more suitable for these climates than the heavier English beers. The fact is recognised by Bass and Company, who have been brewing a specially light beer for India since the competition became active.

(51.) SALT.

(61.) SUGAR.

Salt was introduced from Germany when a syndicate combined to pool the profits of English production and raise the price of English salt to a high figure. The importation was encouraged by the establishment of a line of German steamers between Calcutta and Hamburg. The quality is similar to the quality of Cheshire salt.

Beet sugar competes in India with cane sugar from Mauritius under the operation of the bounties given on the Continent. It is also now competing with sugar refined in India. The establishment of the line of steamers just mentioned has stimulated the import of sugar as well as of salt.

(10.) BUTTER.

(11.) CANDLES.

(14.) CEMENT.

These things are cheaper than English goods, but when England herself imports enormous quantities of foreign butter, being unable to produce enough for her own consumption, it is not difficult to understand why India imports foreign butter. Much of the butter is, in fact, margarine, and it is more largely used for ships' stores than in India.

6. There are some articles in the return which require no consideration; for instance,—

(21.) FOOD-GRAINS.

(25.) FISH.

(49.) DATES, GHI, FISHMAWS.

(53.) SILK, RAW.

With the exception of food-grains these imports are not produced in England or English colonies; and food-grains, which are imported on a very trifling scale, are naturally imported from our nearest neighbours. There is no question of competition in respect of any of these articles.

To these may be added—

(55.) SKINS, RAW.

(65.) WOOL, RAW.

Although these are produced in England and English colonies, the price and quality are prohibitory. India does not require, and could not afford to pay for any but the most inferior descriptions. The importation of Australian wool is very trifling.

We have, &c.,

ELGIN.
G. S. WHITE.
J. WESTLAND.
J. WOODBURN.
M. D. CHALMERS
E. H. H. COLLEN.
A. C. TREVOR.

SEA-BORNE TRADE of BRITISH INDIA with FOREIGN COUNTRIES, other than the UNITED KINGDOM and the BRITISH POSSESSIONS.

No.	Commodity.	Total Value of Importation.			Value of Importations from Foreign Countries			
		1884–85.	1889–90.	1894–95.	Countries.	1884–85.	1889–90.	1894–95.
		Rx.	Rx.	Rx.		Rx.	Rx.	Rx.
2	Animals, horses - -	201,689	231,400	261,115	Austria Hungary -	200	240	150
					East Coast of Africa—			
					Mozambique -	—	—	20
					Egypt - - -	—	80	240
					Arabia - - -	260	390	1,720
					Mekran and Sonmiáni	35	—	2
					Persia - - -	41,250	17,926	9,020
					Turkey in Asia -	26,500	88,599	76,432
					Total - -	68,245	107,185	87,584
3	Apparel (including haberdashery and millinery, but excluding hosiery).	850,135	1,175,207	1,303,893	Austria-Hungary -	44,755	76,537	159,180
					Belgium - -	3,379	11,890	12,274
					France - -	103,413	192,063	229,585
					Germany - -	280	19,365	60,467
	(Sub-divisions—				Greece - -	—	—	1
	(*a*) Men's.				Holland - - -	50	177	2,372
	(*b*) Women's.				Italy - - -	12,571	25,511	19,323
	not separately specified).				Russia in Europe -	1,495	—	104
					Turkey in Europe -	382	103	10
					East Coast of Africa—			
					Mozambique - -	45	2	—
					Zanzibar - -	139	382	207
					Egypt - - -	13,049	17,578	19,758
					Madagascar - -	—	—	14
					South America -	10	—	—
					United States - -	695	501	2,229
					Arabia - -	66	252	14
					Celebes - - -	—	—	20
					China—Treaty Ports -	70	234	8,844
					Cochin-China—Saigon	149	—	215
					Japan - - -	466	656	29,302
					Mekran and Sonmiáni	22	—	—
					Persia - - -	750	1,707	1,077
					Russia in Asia -	—	—	158
					Siam - - -	26	—	65
					Turkey in Asia -	203	1,466	825
					Total - -	182,015	348,424	545,544
4	Arms and ammunition :							
	(*b*) Gunpowder -	—	—	31,407	Germany - -	—	—	2,280
	(*c*) Of all other kinds.	—	—	63,414	Austria-Hungary -	—	—	442
					Belgium - -	—	—	379
					France - - -	—	—	156
					Germany - -	—	—	1,637
					Italy - - -	—	—	891
					East Coast of Africa—			
					Zanzibar - -	—	—	32
					Egypt - -	—	—	115
					United States - -	—	—	5
					Japan - - -	—	—	11
					Persia - - -	—	—	1
					Total - -	—	—	3,669

No.	Commodity.	Total Value of Importation.			Value of Importations from Foreign Countries.			
		1884–85.	1889–90.	1894–95.	Countries.	1884–85.	1889–90.	1894–95.
		Rx.	Rx.	Rx.		Rx.	Rx.	Rx.
6	Ale, beer, and porter	—	462,110	396,506	Austria-Hungary	—	1,327	346
					Belgium	—	2,390	2,673
					France	—	22	81
					Germany	—	21,330	59,501
					Holland	—	—	286
					Italy	—	272	—
					United States	—	42	—
					Arabia	—	2	154
					China—Treaty Ports	—	—	3
					Japan	—	—	80
					Russia in Asia	—	3	—
					Total	—	25,288	63,073
9	Books and printed matter (including maps and charts).	—	—	232,356	Austria-Hungary	—	—	1,405
					Belgium	—	—	238
					France	—	—	481
					Germany	—	—	377
					Greece	—	—	5
					Holland	—	—	1
					Italy	—	—	82
					Turkey in Europe	—	—	99
					East Coast of Africa—			
					Mozambique	—	—	10
					Zanzibar	—	—	65
					Egypt	—	—	1,764
					United States	—	—	12,378
					Arabia	—	—	23
					China—Treaty Ports	—	—	35
					Japan	—	—	126
					Persia	—	—	83
					Siam	—	—	21
					Turkey in Asia	—	—	27
					Total	—	—	17,210
10	Butter	18,159	29,728	35,243	Austria-Hungary	10	—	846
					Belgium	—	371	—
					Denmark	—	—	728
					France	2	469	400
					Germany	70	220	3,699
					Holland	—	—	18
					Italy	2,231	5,607	1,534
					Réunion	—	—	8
					United States	154	—	14
					Russia in Asia	—	—	30
					Total	2,467	6,667	6,772
11	Candles of all sorts	105,023	135,947	137,899	Austria-Hungary	—	8	38
					Belgium	25,111	27,559	51,217
					France	24	1,797	7,059
					Germany	1,090	1,300	6,217
					Holland	—	—	2,786
					Italy	2	8	88
					United States	—	10	—
					Japan	—	—	1
					Persia	—	3	—
					Total	26,227	30,685	67,406
12	Caoutchouc, manufactures of.	—	24,440	34,998	Austria-Hungary	—	526	1,068
					Belgium	—	89	2,032
					France	—	—	259
					Germany	—	739	2,214
					Italy	—	14	26
					United States	—	7	8
					Total	—	1,375	5,602
14	Cement	—	121,515	111,881	Austria-Hungary	—	240	—
					Belgium	—	638	26,646
					France	—	5,151	4,299
					Germany	—	1,861	964
					Italy	—	92	360
					Japan	—	—	86
					Java	—	—	4
					Total	—	7,982	32,359

No.	Commodity.	Total Value of Importation.			Value of Importations from Foreign Countries.			
		1884–85.	1889–90.	1894–95.	Countries.	1884–85.	1889–90.	1894–95.
		Rx.	Rx.	Rx.		Rx.	Rx.	Rx.
15	Cheese	—	46,015	66,461	Austria-Hungary	—	121	217
					Belgium	—	290	398
					France	—	387	268
					Germany	—	8	222
					Holland	—	1,154	2,415
					Italy	—	446	1,812
					Turkey in Europe	—	3	13
					Egypt	—	1	3
					United States	—	11	—
					Persia	—	6	10
					Russia in Asia	—	—	6
					Turkey in Asia	—	36	71
					Total	—	2,468	4,935
16	Chemical products and dye stuffs:							
	X.—Chemicals:							
	(i.) Alum	—	—	36,742	Belgium	—	—	87
					Germany	—	—	130
					Italy	—	—	2,334
					Total	—	—	2,551
	(ii.) Arsenic	—	2,428	2,792	Belgium	—	79	—
					Germany	—	79	935
					Arabia	—	7	—
					Persia	—	4	—
					Turkey in Asia	—	14	196
					Total	—	183	1,131
	(iii.) Chemicals for paper-making.	—	—	88,497	Belgium	—	—	2,221
					Germany	—	—	4,509
					Total	—	—	6,730
	(iv.) Copperas	—	—	6,871	Japan	—	—	1,076
	(v.) Sulphur (brimstone).	13,059	14,743	12,618	France	861	3,474	898
					Germany	—	—	1,705
					Italy	—	2,227	5,516
					Abyssinia	—	375	—
					Japan	—	—	184
					Java	—	—	15
					Persia	150	—	—
					Total	1,011	6,076	8,818
	(vi.) Other sorts	—	—	180,317	Austria-Hungary	—	—	3,362
					Belgium	—	—	4,864
					France	—	—	784
					Germany	—	—	14,156
					Holland	—	—	235
					Italy	—	—	578
					Sweden	—	—	58
					East Coast of Africa—Zanzibar	—	—	1
					Egypt	—	—	10
					United States	—	—	765
					Arabia	—	—	1,767
					Japan	—	—	663
					Java	—	—	34
					Mekran and Sonmiáni	—	—	3
					Russia in Asia	—	—	3
					Total	—	—	27,233
	Y.—Dyeing and tanning materials:							
	Dyes:							
	(a) Natural							
	(i.) Cochineal	—	—	26,351	France	—	—	2,678
	(ii.) Madder or manjit.	34,068	2,949	602	East Coast of Africa—Zanzibar	2	—	—
					Arabia	19	—	36
					Persia	33,711	2,947	565
					Total	33,732	2,947	601

No.	Commodity.	Total Value of Importation.			Value of Importations from Foreign Countries.			
		1884–85.	1889–90.	1894–95.	Countries.	1884–85.	1889–90.	1894–95.
16	Chemical products and dye-stuffs. Y.—Dyeing and tanning materials—*cont.* Dyes—*cont.*	Rx.	Rx.	Rx.		Rx.	Rx.	Rx.
	(*a*) Natural—*cont.*: (iii.) Saffron	39,418	75,035	37,257	Belgium	—	84	—
					France	38,141	71,229	36,964
					Italy	105	1,620	—
					Egypt	—	259	—
					Arabia	—	—	8
					Japan	—	—	64
					Persia	72	240	136
					Total	38,818	73,432	37,167
	(iv.) Other sorts	20,061	17,481	19,763	Austria-Hungary	—	43	10
					Belgium	49	1,132	1,080
					France	—	45	619
					Germany	—	85	81
					East Coast of Africa—			
					Mozambique	—	20	41
					Zanzibar	902	730	191
					United States	—	—	85
					Arabia	347	228	98
					Mekran and Sonmiáni	45	46	82
					Persia	518	622	771
					Turkey in Asia	5,905	4,570	10,715
					Total	7,766	7,471	13,673
	(*b*) Artificial: (i.) Alizarine	*	†	271,041	Austria-Hungary	—	—	14,883
					Belgium	—	—	194,936
					France	—	—	324
					Germany	—	—	7,861
					Holland	—	—	33,546
					Total	*	†	251,550
	(ii.) Aniline	104,895	†	281,808	Austria-Hungary	13,182	—	48,708
					Belgium	2,522	—	147,791
					France	1,188	—	1,448
					Germany	1,116	—	37,315
					Holland	—	—	3,758
					Italy	1,870	—	29,288
					Egypt	612	—	—
					Arabia	—	—	7
					Total	19,890	†	268,815
	(i.) Alizarine and (ii.) Aniline	—	350,654	—	Austria-Hungary	—	17,990	—
					Belgium	—	139,122	—
					France	—	1,750	—
					Germany	—	20,685	—
					Holland	—	133	—
					Italy	—	8,328	—
					Egypt	—	45	—
					Persia	—	1	—
					Turkey in Asia	—	3	—
					Total	—	188,207	—
18	Clocks and watches	94,465	104,581	100,985	Austria-Hungary	8,114	5,532	5,823
					Belgium	200	218	241
					France	36,392	38,615	50,616
					Germany	—	479	4,208
					Italy	3,791	15,233	2,065
					Russia in Europe	—	40	—
					East Coast of Africa—			
					Mozambique	—	6	15
					Zanzibar	—	—	40
					Egypt	236	491	596
					Madagascar	—	4	—
					Réunion	10	—	—
					United States	2,089	7,307	5,391
					Arabia	—	—	35
					China—Treaty Ports	2	2	954
					Japan	1	—	156
					Persia	—	—	3
					Sumatra	5	—	—
					Turkey in Asia	2	—	—
					Total	50,842	67,927	70,142

* Included with No. 16 "dyes, other sorts."

† Not separately enumerated.

No.	Commodity.	Total Value of Importation.			Value of Importations from Foreign Countries.			
		1884–85.	1889–90.	1894–95.	Countries.	1884–85.	1889–90.	1894–95.
		Rx.	Rx.	Rx.		Rx.	Rx.	Rx.
19	Coals:							
	(*d*) Patent fuel -	—	—	4,570	Belgium - - -	—	—	3,188
20	Cordage and twine -	—	—	41,170	Austria-Hungary -	—	—	338
					Belgium -	—	—	1,994
					Germany - - -	—	—	1,282
					East Coast of Africa—			
					Zanzibar - -	—	—	2
					Other ports - -	—	—	4
					United States - -	—	—	4
					Mekran and Sonmiáni -	—	—	9
					Turkey in Asia -	—	—	30
					Total - -	—	—	3,593
21	Corn (Grain and Pulse):							
	(*a*) Wheat - -	5,779	48,785	94,785	East Coast of Africa—			
					Zanzibar - -	—	—	52
					Other ports - -	—	—	15
					Arabia - - -	22	1,695	9,660
					Mekran and Sonmiáni -	—	8	—
					Persia - - -	375	3,081	17,570
					Turkey in Asia - -	5,223	38,996	67,461
					Total - -	5,620	43,780	94,758
	(*b*) Wheat flour -	21,743	18,147	11,905	Austria-Hungary -	1,709	1,362	669
					France - -	—	—	22
					Italy - - -	—	1,787	1,995
					Abyssinia - -	—	—	60
					East Coast of Africa—			
					Zanzibar - -	—	6	10
					Egypt - - -	92	—	—
					United States - -	4	—	14
					Persia - - -	—	7	—
					Russia in Asia - -	—	—	7
					Total - -	1,805	3,162	2,777
	(*c*) Of other kinds:							
	(i.) Barley - -	—	—	3,508	Persia - - -	—	—	282
					Turkey in Asia - -	—	—	3,224
					Total - -	—	—	3,506
	(ii.) Jawár and bájra	—	—	10,573	East Coast of Africa—			
					Mozambique	—	—	163
					Persia - - -	—	—	653
					Turkey in Asia - -	—	—	9,754
					Total - -	—	—	10,570
	(iii.) Oats - -	—	—	746	Germany - -	—	—	306
	(iv.) Gram -	919	951	980	East Coast of Africa—			
					Mozambique -	28	255	20
					Zanzibar - -	—	39	—
					Arabia - - -	4	—	—
					Mekran and Sonmiáni	1	4	—
					Persia - -	791	580	166
					Turkey in Asia -	7	16	—
					Total - -	831	894	186
	(v.) Pulse -	1,969	16,134	6,100	Italy - - -	—	—	7
					Arabia - - -	1	28	—
					Mekran and Sonmiáni -	127	3,582	1,552
					Persia - -	—	4	71
					Turkey in Asia -	597	10,571	2,915
					Total - -	725	14,185	4,545
	(vi.) Rice in the husk.	—	5,438	8,079	Persia - -	—	22	1,054
					Turkey in Asia	—	5,391	7,009
					Total -	—	5,413	8,063

No.	Commodity.	Total Value of Importation.			Value of Importations from Foreign Countries.			
		1884–85.	1889–90.	1894–95.	Countries.	1884–85.	1889–90.	1894–95.
		Rx.	Rx.	Rx.		Rx.	Rx.	Rx.
21	Corn (Grain and Pulse) —*cont.*							
	(*c*) Of other kinds— *cont.*							
	(vii.) Rice not in the husk.	1,862	13,739	47,224	Italy	—	—	12
					East Coast of Africa—			
					Mozambique	8	—	
					Zanzibar	1	—	—
					Other ports	—	—	4
					Egypt	4	—	2
					Réunion	—	—	2
					Arabia	—	—	16
					Mekran and Sonmiáni	—	2	—
					Persia	170	640	8
					Siam	8	—	1,274
					Sumatra	8	6	—
					Turkey in Asia	82	11,365	8,580
					Total	221	12,013	9,848
	(viii.) Other sorts	8,276	34,772	18,105	Italy	—	—	5
					East Coast of Africa—			
					Mozambique	94	640	153
					Zanzibar	—	2	—
					Mekran and Sonmiáni	35	69	1
					Arabia	42	49	—
					Persia	43	10,440	841
					Turkey in Asia	7,523	22,807	16,993
					Total	7,737	34,007	17,993
23	Cotton manufactures :							
	(*a*) Piece goods :							
	(i.) Handkerchiefs and shawls in the piece.	203,278	—	199,765	Austria-Hungary	13,569	—	15,852
					Belgium	35	—	25
					France	1,227	—	295
					Germany	461	—	13,077
					Holland	—	—	207
					Italy	1,611	—	179
					Egypt	76	—	—
					Japan	10	—	3
					Turkey in Asia	2	—	11
					Total	16,991	—	29,649
	(*c*) Thread for sewing	—	—	164,529	Austria-Hungary	—	—	8,898
					Belgium	—	—	1,470
					Germany	—	—	2,070
					Italy	—	—	121
					Persia	—	—	51
					Total	—	—	12,610
	(*d*) Lace and patent net. (Curtains not specified.)	65,134	48,213	35,289	Austria-Hungary	8,426	1,308	1,943
					France	3,706	165	379
					Germany	—	47	39
					Italy	2,616	6,800	—
					Egypt	148	—	—
					Total	14,896	8,320	2,361
	(*e*) Hosiery, pure and mixed. (Shirts, pants, socks not specified.)	80,427	73,538	154,015	Austria-Hungary	2,941	6,844	81,797
					Belgium	154	381	510
					France	988	158	568
					Germany	1,262	5,945	14,894
					Italy	4,511	7,969	6,740
					Turkey in Europe	45	—	—
					Egypt	—	15	—
					Japan	—	—	41
					Persia	5	—	—
					Total	9,906	21,312	104,550
	(*f*) Canvas	2,240	2,833	1,858	Austria-Hungary	—	137	260
					Belgium	150	—	—
					Germany	—	199	88
					Maldives	—	—	20
					Arabia	20	15	—
					Total	170	351	368

No.	Commodity.	Total Value of Importation.			Value of Importations from Foreign Countries.			
		1884–85.	1889–90.	1894–95.	Countries.	1884–85.	1889–90.	1894–95.
23	Cotton manufactures—*cont.*	Rx.	Rx.	Rx.		Rx.	Rx.	Rx.
	(*g*) Other sorts -	—	—	83,447	Austria Hungary -	—	—	901
					Belgium - -	—	—	6,400
					Germany - -	—	—	2,688
					Holland - -	—	—	15,402
					Italy - -	—	—	49
					Abyssinia - -	—	—	7
				*	United States - -	—	—	11
					Japan - -	—	—	8
					Mekran and Sonmiáni -	—	—	36
					Total - -	—	—	25,502
24	Earthenware and porcelain.	—	223,929	192,843	Austria-Hungary -	—	536	2,206
					Belgium - -	—	19,432	40,197
					France - - -	—	1,375	1,423
					Germany - -	—	2,947	6,648
					Holland - - -	—	3	101
					Italy - - -	—	377	431
					Turkey in Europe -	—	20	—
					Egypt - -	—	180	59
					United States - -	—	268	227
					Arabia - -	—	4	11
					China—Treaty Ports -	—	332	950
					Cochin-China—Saigon	—	3	—
					Japan - - -	—	808	2,959
					Mekran and Sonmiáni -	—	—	1
					Persia - - -	—	59	35
					Siam - - -	—	7	3
					Turkey in Asia -	—	65	39
					Total - -	—	26,416	55,282
—	Fireworks - -	—	—	57,943	Belgium - -	—	—	136
					Germany - -	—	—	4,987
					Total - -	—	—	5,123
25	Fish :							
	(*a*) Herrings (not specified).							
	(*b*) Of other sorts :							
	(i.) Fish, dry unsalted.	*	6,511	5,900	Italy - - -	—	1	2
					Arabia - -	—	1,960	2,168
					Maldives - -	—	812	197
					Mekran and Sonmiáni -	—	480	432
					Persia - -	—	796	236
					Turkey in Asia -	—	102	42
					Total - -	*	4,151	3,077
	(ii.) Fish, dry salted.	96,901	164,004	155,474	Italy - - -	11	—	8
					Russia in Europe -	—	4	—
					Arabia - -	7,970	7,535	3,310
					Maldives - -	13	3	2
					Mekran and Sonmiáni -	17,067	16,936	11,740
					Persia - -	2,032	2,903	1,130
					Turkey in Asia -	125	359	49
					Total - -	27,218	27,740	16,234
26	Cabinet-ware and furniture.	68,931	99,397	89,024	Austria-Hungary -	5,920	10,410	5,464
					Belgium - -	595	727	792
					France - - -	6,663	748	703
					Germany - -	67	7,365	13,767
					Greece - - -	—	—	1
					Holland - - -	—	—	86
					Italy - - -	750	2,612	611
					Turkey in Europe -	7	—	—
					East Coast of Africa—			
					Mozambique - -	9	6	7
					Zanzibar - -	4	12	3
					Egypt - -	633	251	82
					Madagascar - -	—	—	1
					United States - -	196	250	1,533
					Arabia - - -	8	8	—
					China—Treaty Ports -	—	385	560
					Japan - - -	339	2,028	4,854
					Maldives - -	13	—	—
					Persia - - -	47	1	45
					Mekran and Sonmiáni -	2	—	—
					Russia in Asia - -	—	—	2
					Siam - - -	17	—	5
					Sumatra - - -	1	—	—
					Turkey in Asia -	6	18	51
					Total - -	15,277	24,771	28,567

* Not separately enumerated.

No.	Commodity.	Total Value of Importation.			Value of Importations from Foreign Countries.			
		1884–85.	1889–90.	1894–95.	Countries.	1884–85.	1889–90.	1894–95.
		Rx.	Rx.	Rx.		Rx.	Rx.	Rx.
27	Glass: (a) Sheet and plate	48,065	55,244	56,480	Austria-Hungary	134	574	—
					Belgium	15,731	25,449	39,557
					Germany	246	98	1,368
					Total	16,111	26,121	40,925
	(c) Common bottles	—	—	32,215	Austria-Hungary	—	—	32
					Belgium	—	—	34
					Germany	—	—	2,705
					East Coast of Africa—			
					Mozambique	—	—	4
					Zanzibar	—	—	81
					Egypt	—	—	9
					United States	—	—	1
					Arabia	—	—	41
					Mekran and Sonmiáni	—	—	33
					Persia	—	—	27
					Siam	—	—	1
					Total	—	—	2,918
	(d) Of other sorts: (i.) Beads and false pearls.	146,621	183,771	129,336	Austria-Hungary	29,975	35,122	35,374
					Belgium	369	220	2,858
					France	4,669	41,542	37,451
					Germany	230	2,115	11,239
					Holland	—	1,638	218
					Italy	63,550	66,214	35,195
					Abyssinia	—	35	—
					East Coast of Africa—			
					Mozambique	16	42	3
					Zanzibar	—	10	—
					Egypt	105	—	—
					Arabia	1	—	—
					China—Treaty Ports	—	133	914
					Turkey in Asia	2	10	7
					Total	98,917	147,081	123,249
	(ii) Other ware	291,260	382,289	401,966	Austria-Hungary	15,911	32,453	58,055
					Belgium	25,159	50,100	62,511
					France	2,469	2,535	1,337
					Germany	1,077	18,596	50,321
					Holland	—	34	6
					Italy	1,485	1,493	452
					Turkey in Europe	5	160	—
					East Coast of Africa—			
					Mozambique	3	—	—
					Zanzibar	28	20	78
					Egypt	378	52	8
					United States	702	513	1,115
					Arabia	108	10	2
					China—Treaty Ports	—	77	28,900
					Cochin-China—Saigon	—	1	—
					Japan	100	10	723
					Persia	14	44	39
					Siam	12	—	1
					Sumatra	17	—	—
					Turkey in Asia	5	24	30
					Total	47,468	106,122	203,578
29	Haberdashery and millinery.	*	*	*		*	*	*

* Included with No. "apparel."

No.	Commodity.	Total Value of Importation.			Value of Importations from Foreign Countries.			
		1884–85.	1889–90.	1894–95.	Countries.	1884–85.	1889–90.	1894–95.
		Rx.	Rx.	Rx.		Rx.	Rx.	Rx.
30	Hardware and cutlery (including plated ware).	—	1,096,190	1,243,946	Austria-Hungary	—	28,661	54,074
					Belgium	—	25,987	48,211
					France	—	8,810	8,224
					Germany	—	29,589	96,448
					Greece	—	—	9
					Holland	—	123	415
					Italy	—	2,277	2,818
					Sweden	—	—	282
					Turkey in Europe	—	148	—
					East Coast of Africa—			
					Mozambique	—	8	9
					Zanzibar	—	56	62
					Egypt	—	290	—
					Madagascar	—	—	41
					South America	—	—	15
					United States	—	3,440	6,131
					Arabia	—	271	136
					China—Treaty Ports	—	68	401
					Japan	—	280	3,471
					Maldives	—	8	—
					Mekran and Sonmiáni	—	6	7
					Persia	—	110	186
					Russia in Asia	—	—	16
					Siam	—	—	2
					Turkey in Asia	—	43	32
					Total	—	100,175	220,990
	(a) Sewing machines (Other sub-divisions not specified.)	*	*	39,951	Austria-Hungary	—	—	81
					Belgium	—	—	594
					France	—	—	2
					Germany	—	—	4,651
					Italy	—	—	17
					United States	—	—	4,829
					Total	*	*	10,174
88	Instruments and apparatus—							
	(a) Musical instruments.	72,971	85,588	91,269	Austria-Hungary	3,927	9,249	7,466
					Belgium	946	1,123	759
					France	2,359	2,986	6,605
					Germany	397	2,653	13,564
					Greece	2	—	—
					Italy	4,904	485	485
					East Coast of Africa—			
					Zanzibar	—	120	13
					Egypt	50	—	2
					United States	400	181	798
					Arabia	25	—	—
					China—Treaty Ports	—	—	24
					Japan	—	—	32
					Persia	5	—	10
					Siam	—	—	10
					Total	13,015	16,797	29,763
	(b) Photographic	—	—	46,733	Austria-Hungary	—	—	1,514
					Belgium	—	—	1
					France	—	—	74
					Germany	—	—	1,427
					Italy	—	—	273
					Egypt	—	—	2
					United States	—	—	101
					Japan	—	—	4
					Persia	—	—	11
					Total	—	—	3,407
	(c) Scientific, philosophical.	—	99,894	127,121	Austria-Hungary	—	5,751	6,069
					Belgium	—	369	1,158
					France	—	2,341	3,695
					Germany	—	1,131	2,318
					Italy	—	187	244
					Sweden	—	—	43
					Egypt	—	—	2
					United States	—	125	607
					Arabia	—	—	2
					China—Treaty Ports	—	—	14
					Japan	—	—	42
					Persia	—	1	—
					Total	—	9,905	14,194

* Included with No. 30 "hardware and cutlery."

No.	Commodity.	Total Value of Importation.			Value of Importations from Foreign Countries.			
		1884–85.	1889–90.	1894–95.	Countries.	1884–85.	1889–90.	1894–95.
		Rx.	Rx.	Rx.		Rx.	Rx.	Rx.
38	Manure	2,667	1,005	1,908	France	8	—	—
					Germany	—	—	301
					East Coast of Africa—			
					Zanzibar	88	6	187
					Madagascar	—	8	—
					Arabia	166	132	141
					Mekran and Sonmiáni	628	202	122
					Persia	52	—	42
					Turkey in Asia	—	—	3
					Total	937	343	796
—	Matches, lucifer and other.	204,285	239,407	367,845	Austria-Hungary	784	1	40
					Belgium	1,800	4,116	29,964
					France	—	250	—
					Germany	13,108	24,658	34,451
					Norway	—	11,384	65,268
					Sweden	—	4,384	16,041
					East Coast of Africa—			
					Zanzibar	5	—	—
					Egypt	19	—	—
					Japan	—	—	107,851
					Mekran and Sonmiáni	1	—	—
					Persia	10	—	—
					Total	15,227	44,388	253,610
39	Drugs and Medicines :							
	(*a*) Aloes	2,766	2,454	1,098	Arabia	1,859	1,510	865
					Persia	—	15	—
					Total	1,859	1,525	865
	(*b*) Asafœtida	35,008	40,229	35,429	France	—	—	287
					Arabia	—	—	6
					Persia	34,994	40,218	35,136
					Total	34,994	40,218	35,429
	(*c*) Camphor	—	—	100,906	France	—	—	73
					Germany	—	—	52
					Japan	—	—	8,692
					Total	—	—	8,817
	(*e*) Other sorts	161,802	206,230	270,709	Austria-Hungary	3,051	3,958	1,666
					Belgium	472	925	3,521
					France	3,588	3,458	4,251
					Germany	20	4,595	17,695
					Holland	—	—	495
					Italy	1,841	404	260
					Turkey in Europe	54	—	2
					East Coast of Africa—			
					Mozambique	193	58	740
					Zanzibar	214	568	171
					Other ports	22	—	—
					Egypt	3,304	894	827
					United States	262	631	2,676
					Arabia	888	403	103
					China—Treaty Ports	—	—	469
					Japan	119	51	1,038
					Maldives	4	—	—
					Mekran and Sonmiáni	—	8	2
					Persia	4,658	7,198	6,851
					Siam	—	—	37
					Turkey in Asia	3,489	2,003	2,026
					Total	21,179	22,649	42,823
40	Metals :							
	(a) Iron :							
	(i.) Old, for re-manufacture.	—	—	8,682	Belgium	—	—	8
					Germany	—	—	13
					Abyssinia	—	—	121
					East Coast of Africa—			
					Mozambique	—	—	4
					Zanzibar	—	—	104
					United States	—	—	3
					Arabia	—	—	32
					Persia	—	—	7
					Turkey in Asia	—	—	1,140
					Total	—	—	1,432

No.	Commodity.	Total Value of Importation.			Value of Importations from Foreign Countries.			
		1884–85.	1889–90.	1894–95.	Countries.	1884–85.	1889–90.	1894–95.
		Rx.	Rx.	Rx.		Rx.	Rx.	Rx.
40	Metals—*cont.*							
	(*a*) Iron—*cont.*							
	(ii.) Wrought:							
	(1) Bar -	548,242	516,840	286,542	Belgium - -	38,073	94,496	159,932
					Germany - -	187	216	25,159
					Italy - -	18	—	—
					Sweden - -	—	1,693	5,548
					Persia - -	4	—	—
					Total - -	38,282	96,405	190,634
	(2) Angle, bolt, and rod.	192,501	247,354	281,559	Belgium - -	16,517	50,606	192,321
					Germany - -	187	320	10,497
					Sweden - -	—	—	8,811
					United States - -	—	2	—
					Persia - -	—	—	18
					China—Treaty Ports -	3	—	—
					Total - -	16,707	50,928	211,642
	(3) Sheets and plates.	—	371,586*	217,713†	Belgium - -	—	97,307	134,864
					Germany - -	—	—	1,679
					Persia - -	—	—	494
					Total - -	—	97,307*	136,537†
	(4) H -	—	65,271	54,570	Austria-Hungary -	—	1	—
					Belgium - -	—	3,771	8,799
					Germany - -	—	—	545
					East Coast of Africa—Mozambique - -	—	1	—
					Arabia - -	—	7	—
					Mekran and Sonmiáni -	—	—	3
					Persia - - -	—	11	—
					Total - -	—	3,791	9,347
	(5) Nails, screws, and rivets.	89,157	108,487	164,820	Austria-Hungary -	1	—	—
					Belgium - -	8,295	17,523	67,848
					Germany - -	3,813	4,212	11,989
					Holland - -	—	—	2,569
					Norway - -	—	2,612	913
					Sweden - -	—	—	772
					East Coast of Africa—Mozambique - -	—	—	7
					Arabia - -	2	23	7
					Mekran and Sonmiáni -	1	—	—
					Total - -	12,112	24,370	84,105
	(6) Wire -	6,287	12,754	11,402	Belgium - -	487	3,123	4,740
					Germany - -	—	93	363
					Total - -	487	3,216	5,103
	(7) Beams, pillars, girders, and bridge work.	—	255,538	217,925	Belgium - -	—	62,882	63,414
					Germany - -	—	6	—
					Total - -	—	62,888	63,414
	(8) Other manufactures of wrought or cast-iron, or of iron mixed with steel.	—	94,685	55,013	Austria Hungary -	—	54	—
					Belgium - -	—	7,030	4,525
					France - - -	—	—	1,171
					Germany - -	—	5	15
					United States - -	—	—	747
					Total - -	—	7,089	6,458
	(*k*) Steel, manufactures of—							
	(i) Bars - -	‡	‡	188,948	Belgium - -	—	—	119,189
					Germany - -	—	—	28,516
					Holland - -	—	—	30
					Total - -	‡	‡	147,735

* Inclusive of "tinned plates." † Exclusive of "tinned plates." ‡ Included with "steel, other sorts"

No.	Commodity.	Total Value of Importation.			Value of Importations from Foreign Countries.			
		1884–85.	1889–90.	1894–95.	Countries.	1884–85.	1889–90.	1894–95.
		Rx.	Rx.	Rx.		Rx.	Rx.	Rx.
	Metals—*cont.*							
	(*k*) Steel, manufactures of—*cont.*							
40	(ii.) Hoop	—	—	115,268	Belgium	—	—	7,091
					Germany	—	—	2,960
					Total	—	—	10,051
	(iii.) Plates and sheets.	*	*	98,748	Belgium	—	—	58,979
					Germany	—	—	2,475
					Total	*	*	61,454
	(iv.) Other sorts	73,218	162,859	167,332	Austria-Hungary	180	—	—
					Belgium	15,104	37,725	67,861
					Germany	1,040	10,286	12,952
					Italy	—	—	187
					Sweden	—	—	2,767
					United States	25	—	—
					China—Treaty Ports	—	1	—
					Turkey in Asia	—	—	5
					Total	16,349	48,012	83,272
	(*b*) Copper—							
	(i.) Old, for re-manufacture.	3,298	4,485	4,666	Austria-Hungary	—	27	—
					France	24	—	—
					Abyssinia	—	—	3
					East Coast of Africa—			
					Mozambique	36	95	23
					Zanzibar	1,085	1,512	212
					Other ports	2	—	24
					Egypt	2	4	113
					Madagascar	—	121	430
					Réunion	225	—	—
					Arabia	964	459	732
					Maldives	24	19	80
					Mekran and Sonmiáni	—	1	—
					Persia	3	184	388
					Turkey in Asia	269	87	95
					Total	2,634	2,509	2,050
	(*a*) Unwrought—							
	(i.) Tiles, ingots, cakes, and bricks.	—	899,815	36,595	France	—	20,938	—
					Japan	—	3,129	24,033
					Total	—	24,067	24,033
	(ii.) Other sorts	290,718	—	172,360	Japan	27,849	—	31,101
	(*b*) Wrought—							
	Of other sorts—							
	(i.) Lametta	47,238	46,864	59,934	Austria-Hungary	36,650	24,645	31,988
					Belgium	62	20	—
					France	81	16,473	12,620
					Germany	—	401	10,398
					Italy	5,243	3,393	1,327
					East Coast of Africa—			
					Zanzibar	—	—	11
					Cochin-China—Saigon	—	—	137
					Total	42,036	44,932	56,476
	(ii.) Sheets and other manufactures.	—	—	544,456	Austria-Hungary	—	—	3,210
					Belgium	—	—	18,161
					France	—	—	8,632
					Germany	—	—	1,867
					Italy	—	—	544
					East Coast of Africa—			
					Zanzibar	—	—	2,020
					Arabia	—	—	3,506
					China—Treaty Ports	—	—	322
					Mekran and Sonmiáni	—	—	4
					Persia	—	—	116
					Total	—	—	39,382

* Included with "Steel, other sorts."

No.	Commodity.	Total Value of Importation.			Value of Importations from Foreign Countries.			
		1884–85.	1889–90.	1894–95.	Countries.	1884–85.	1889–90.	1894–95.
		Rx.	Rx.	Rx.		Rx.	Rx.	Rx.
40	Metals—*cont.*							
	(*c*) Brass of all sorts	68,038	71,665	47,695	Austria-Hungary	7,018	9,992	5,006
					Belgium	184	2,128	1,095
					France	145	324	143
					Germany	7	1,014	1,085
					Italy	75	—	59
					Turkey in Europe	—	64	—
					East Coast of Africa—			
					Mozambique	77	34	4
					Zanzibar	740	109	176
					Egypt	50	21	—
					Madagascar	—	4	521
					United States	—	1	—
					Arabia	359	366	514
					China—Treaty Ports	—	20	95
					Persia	37	126	169
					Siam	—	—	4
					Turkey in Asia	1	68	118
					Sumatra	3	—	—
					Total	8,696	14,266	8,989
	(*d*) Lead, pig, sheet, and pipe.	—	—	143,750	Belgium	—	—	110
					France	—	—	7,427
					Italy	—	—	453
					East Coast of Africa—			
					Zanzibar	—	—	8
					Total	—	—	7,998
	(*f*) Zinc, wrought and unwrought.	—	113,477	129,072	Austria-Hungary	—	—	40
					Belgium	—	14,367	5,672
					France	—	—	32
					Germany	—	240	28,563
					Holland	—	—	95
					East Coast of Africa—			
					Zanzibar	—	35	101
					Arabia	—	6	—
					Total	—	14,648	34,503
44	Painters' colours and materials.	204,968	267,366	299,559	Austria-Hungary	643	834	1,215
					Belgium	3,166	17,774	24,622
					France	1,735	599	2,120
					Germany	174	2,607	7,413
					Italy	188	2,375	4,066
					East Coast of Africa—			
					Zanzibar	483	15	—
					United States	3,471	712	1,436
					Egypt	15	—	—
					Arabia	941	814	342
					China—Treaty Ports	—	—	47
					Java	—	—	212
					Persia	1,943	980	3,017
					Russia in Asia	—	—	41
					Turkey in Asia	—	9	24
					Total	12,759	26,719	44,555
45	Paper:							
	(i.) Printing paper	143,312	142,826	109,237	Austria-Hungary	12,990	39,100	33,984
					Belgium	1,020	1,689	1,227
					Germany	179	8,367	13,799
					Holland	—	—	116
					Italy	285	5	109
					United States	—	—	143
					Arabia	74	—	—
					Total	14,548	49,161	49,378
	(ii.) Writing paper and envelopes.	129,147	154,626	129,680	Austria-Hungary	36,732	42,059	30,639
					Belgium	9,282	13,895	13,682
					France	61	179	109
					Germany	324	2,155	2,625
					Italy	505	730	1,184
					China—Treaty Ports	—	—	7
					Japan	—	15	53
					Siam	13	—	—
					Total	46,917	59,033	48,299

No.	Commodity.	Total Value of Importation.			Value of Importations from Foreign Countries.			
		1884–85.	1889–90.	1894–95.	Countries.	1884–85.	1889–90.	1894–95.
		Rx.	Rx.	Rx.		Rx.	Rx.	Rx.
45	Paper—*cont.* (iii.) Other kinds of paper.	72,771	106,819	104,208	Austria-Hungary	11,811	31,469	28,329
					Belgium	1,193	2,946	5,175
					France	2	86	184
					Germany	—	1,296	16,664
					Holland	—	—	227
					Italy	98	190	290
					Norway	—	—	81
					Sweden	—	1,659	97
					Egypt	—	6	10
					United States	38	127	95
					Arabia	8	—	—
					China—Treaty Ports	9	180	630
					Japan	25	14	80
					Total	12,679	37,973	51,762
48	Plate and plated-ware: Plate (jewellery)	11,647	—	4,035	Austria-Hungary	5,003	—	—
					France	18	—	315
					Germany	—	—	281
					Italy	12	—	186
					Turkey in Europe	533	—	—
					United States	—	—	21
					Egypt	1	—	—
					China—Treaty Ports	2	—	—
					Japan	90	—	—
					Turkey in Asia	28	—	—
					Total	5,686	—	803
	(*b*) Plated-ware.	*	*	*		*	*	*
	(*d*) Jewellery	84,542	75,735	91,107	Austria-Hungary	6,937	10,364	14,303
					Belgium	49	297	681
					France	5,218	6,378	6,408
					Germany	15	738	1,045
					Italy	10,669	1,672	1,432
					Turkey in Europe	51	—	—
					East Coast of Africa—			
					Mozambique	101	—	—
					Zanzibar	1,146	2,915	1,062
					Egypt	538	206	129
					Madagascar	—	15	76
					United States	55	180	168
					Arabia	136	270	372
					China—Treaty Ports	—	15	559
					Japan	5	—	226
					Persia	50	2	299
					Siam	—	—	11
					Turkey in Asia	186	900	21
					Total	25,158	23,942	26,785
49	Provisions, not otherwise described: (*a*) Fishmaws and sharkfins.	36,320	48,247	38,613	East Coast of Africa—			
					Mozambique	—	—	29
					Zanzibar	2,712	2,012	2,565
					Other Ports	15	—	260
					Madagascar	—	39	93
					Arabia	12,671	17,711	12,824
					Maldives	880	—	—
					Mekran and Sonmiáni	7,288	13,317	6,171
					Persia	3,678	5,964	—
					Turkey in Asia	655	511	—
					Total	27,399	39,554	21,941
	(*b*) Fruits and vegetables: dried, salted, or preserved: (i.) Dates	280,855	374,016	348,961	East Coast of Africa—			
					Other Ports	—	—	3
					Arabia	122,052	147,928	125,950
					Mekran and Sonmiáni	825	2,584	1,311
					Persia	45,984	56,809	49,985
					Turkey in Asia	111,431	166,036	171,464
					Total	280,292	373,357	348,713

* Included with No. 30 "hardware and cutlery."

No.	Commodity.	Total Value of Importation.			Value of Importations from Foreign Countries.			
		1884–85.	1889–90.	1894–95.	Countries.	1884–85.	1889–90.	1894–95.
		Rx.	Rx.	Rx.		Rx.	Rx.	Rx.
49	Provisions, not otherwise described—*contd.* (*b*) Fruits and vegetables: dried, salted, or preserved—*contd.*							
	(ii.) Other sorts	86,008	149,403	153,359	Austria-Hungary	64	59	50
					Belgium	—	—	9
					France	230	47	13,317
					Germany	22	219	174
					Greece	—	—	2
					Italy	493	25	1,901
					Russia in Europe	—	4	—
					Spain (excluding Gibraltar).	—	15	—
					Turkey in Europe	—	2	—
					East Coast of Africa—			
					Mozambique	—	—	2
					Zanzibar	2	36	15
					Egypt	212	32	40
					United States	31	79	3
					Arabia	1,383	4,216	1,491
					China—Treaty Ports	34	41	51
					Cochin-China—Saigon	1	46	—
					Mekran and Sonmiáni	14	29	21
					Persia	72,414	126,108	120,478
					Siam	—	—	8
					Turkey in Asia	3,287	4,900	2,517
					Total	78,187	135,858	140,079
	(*c*) Ghi	48,540	103,757	7,694	East Coast of Africa—			
					Zanzibar	22	—	—
					Arabia	57	86	33
					Mekran and Sonmiáni	13,056	21,615	3,619
					Persia	6,092	24,568	2,774
					Turkey in Asia	29,190	57,151	764
					Total	48,417	103,420	7,190
51	Salt (Sub-divisions (*a*) refined (*b*) rock not separately specified.)	549,238	894,532	843,193	Austria-Hungary	—	—	3
					France	1	—	—
					Germany	14,461	112,138	144,943
					Holland	—	—	3
					Italy	15,479	—	1
					East Coast of Africa—			
					Zanzibar	325	—	—
					Egypt	11,584	3,738	45,147
					Madagascar	—	32	295
					United States	—	—	3
					Cochin-China—Saigon	505	—	—
					Arabia	26,034	50,175	33,085
					Persia	4,439	10,968	19,150
					Siam	—	—	5
					Total	72,828	177,051	242,635
52	Seeds of all sorts	65,880	108,361	91,635	Austria-Hungary	213	217	448
					Belgium	—	47	3
					France	414	521	89
					Germany	—	2,037	1,246
					Holland	—	—	5
					Italy	130	219	66
					East Coast of Africa—			
					Mozambique	751	3,603	1,401
					Zanzibar	1,036	8,462	514
					Other ports	20	—	—
					Egypt	7	79	30
					United States	79	8	113
					Arabia	520	179	322
					China—Treaty Ports	20	—	—
					Japan	49	—	3
					Java	5	—	1
					Mekran and Sonmiáni	208	837	544
					Persia	12,167	16,423	33,909
					Siam	2	—	—
					Sumatra	1	—	—
					Turkey in Asia	2,825	4,555	8,703
					Total	18,447	37,187	47,399

No.	Commodity.	Total Value of Importation.			Value of Importations from Foreign Countries.			
		1884–85.	1889–90.	1894–95.	Countries.	1884–85.	1889–90.	1894–95.
		Rx.	Rx.	Rx.		Rx.	Rx.	Rx.
53	Silk, raw	747,563	1,067,045	1,086,533	Austria-Hungary	1,288	—	577
					France	1,737	565	36
					Germany	—	—	156
					Italy	—	—	1,180
					Egypt	235	16,028	9,952
					Arabia	326	—	64
					China—Treaty Ports	80,304	174,361	389,958
					Japan	—	6,069	13,498
					Mekran and Sonmiáni	—	—	25
					Persia	18,898	9,175	6,245
					Russia in Asia	—	—	2,170
					Turkey in Asia	—	78	733
					Total	102,788	206,276	424,394
54	Silk manufactures : (*a*) Piece goods	1,120,600	1,423,027	935,868	Austria-Hungary	6,669	2,579	36,820
					Belgium	1,521	923	4,357
					France	136,929	83,555	62,216
					Germany	—	2,332	12,448
					Holland	—	—	46
					Italy	12,839	26,717	12,925
					Russia in Europe	360	—	159
					Turkey in Europe	—	—	111
					East Coast of Africa—Zanzibar	—	411	16
					Egypt	2,726	10,261	8,829
					Other countries in Africa (Algiers)	100	—	—
					Arabia	183	104	46
					China—Treaty Ports	2,661	13,962	151,609
					Cochin-China—Saigon	60	95	—
					Japan	80	715	15,636
					Persia	3,740	2,646	7,125
					Russia in Asia	—	—	412
					Siam	—	—	8
					Turkey in Asia	60	172	222
					Total	167,878	144,472	312,985
	(*b*) Of other kinds: (i.) Thread for sewing	4,775	11,193	9,268	Austria-Hungary	525	602	302
					France	77	444	536
					Germany	—	28	454
					Italy	—	78	2,558
					Arabia	—	—	30
					China—Treaty Ports	3	—	160
					Persia	—	1	—
					Total	605	1,153	4,040
	(ii.) Goods of silk mixed with other materials.	144,048	335,760	295,316	Austria-Hungary	5,819	16,684	27,471
					Belgium	918	3,102	32,672
					France	64,727	243,744	94,290
					Germany	409	7,941	15,437
					Holland	—	—	13,929
					Italy	5,487	34,772	5,603
					Russia in Europe	—	—	1
					East Coast of Africa—Zanzibar	50	53	83
					Egypt	783	868	12,380
					United States	—	—	4
					Arabia	3,176	1,395	—
					China—Treaty Ports	180	14	243
					Japan	—	—	25
					Persia	125	920	229
					Russia in Asia	—	—	177
					Turkey in Asia	558	801	—
					Total	82,232	310,294	202,544
	(iii.) Other sorts	—	—	37,472	Austria-Hungary	—	—	51
					France	—	—	480
					Germany	—	—	356
					Italy	—	—	28,249
					Persia	—	—	135
					Total	—	—	29,271

No.	Commodity.	Total Value of Importation.			Value of Importations from Foreign Countries.			
		1884–85.	1889–90.	1894–95.	Countries.	1884–85.	1889–90.	1894–95.
		Rx.	Rx.	Rx.		Rx.	Rx.	Rx.
55	Skins:							
	(i.) Raw	12,129	31,332	71,640	Belgium	—	—	209
					East Coast of Africa—			
					Mozambique	—	—	7
					Zanzibar	26	45	516
					Egypt	—	—	75
					United States	—	707	—
					Arabia	1,272	34,522	6,975
					Mekran and Sonmiáni	220	671	1,722
					Persia	1,407	8,895	40,674
					Turkey in Asia	1,804	7,101	4,002
					Total	4,729	51,941	54,179
	(ii.) Dressed or tanned.	21,308	33,120	48,191	Austria-Hungary	—	12	132
					Belgium	21	—	801
					France	326	1,087	355
					Germany	35	1,084	1,746
					Italy	—	—	68
					United States	42	—	—
					Egypt	240	—	2
					Arabia	66	—	—
					Persia	2,752	503	195
					Turkey in Asia	214	317	93
					Total	3,696	3,003	3,382
56	Soap	—	111,388	104,766	Austria-Hungary	—	8,141	5,118
					Belgium	—	336	447
					France	—	107	267
					Germany	—	170	2,043
					Italy	—	2,550	1,508
					Turkey in Europe	—	1	10
					East Coast of Africa—			
					Zanzibar	—	—	60
					Egypt	—	21	—
					United States	—	179	53
					Arabia	—	2	—
					Japan	—	—	90
					Russia in Asia	—	—	1
					Turkey in Asia	—	8	12
					Total	—	11,515	9,609
57	Spirits:							
	(i.) Brandy	272,096	226,354	184,751	Austria-Hungary	5	8	131
					Belgium	770	1,889	1,494
					France	50,527	78,245	99,655
					Germany	1,805	5,161	7,351
					Greece	—	—	75
					Holland	—	—	1,033
					Italy	876	1,355	836
					Norway	—	—	171
					East Coast of Africa—			
					Zanzibar	—	—	3
					Egypt	—	335	606
					Madagascar	90	—	—
					South America	2	—	—
					Arabia	2	—	1
					Russia in Asia	—	3	3
					Siam	—	—	1
					Turkey in Asia	—	—	21
					Total	54,077	86,996	111,381
	(ii.) Gin	37,483	32,354	24,514	Belgium	1,215	1,639	1,088
					France	—	—	20
					Germany	237	4,328	2,984
					Holland	514	1,328	5,564
					East Coast of Africa—			
					Mozambique	—	—	1
					Siam	—	—	4
					Total	1,966	7,195	9,661
	(iii.) Spirit when used in drugs, medicines or chemicals in a proportion of less than 20 per cent. of spirit of the strength of London proof.	21,795	32,201	30,273	Austria-Hungary	9	90	18
					Belgium	57	29	273
					France	842	1,711	1,578
					Germany	—	68	501
					Italy	85	109	89
					Egypt	54	—	—
					United States	1,945	1,804	1,525
					Arabia	—	3	4
					Russia in Asia	—	—	1
					Total	2,992	3,814	3,989

No.	Commodity.	Total Value of Importation.			Value of Importations from Foreign Countries.			
		1884–85.	1889–90.	1894–95.	Countries.	1884–85.	1889–90.	1894–95.
57	Spirits—*cont.*	Rx.	Rx.	Rx.		Rx.	Rx.	Rx.
	(iv) Spirit when so used in a proportion of 20 per cent. and upwards.	—	39,425	53,666	Austria-Hungary	—	428	261
					Belgium	—	630	110
					France	—	570	989
					Germany	—	278	2,387
					Italy	—	230	18
					East Coast of Africa—Zanzibar	—	1	221
					Egypt	—	—	191
					United States	—	571	6,295
					Persia	—	—	2
					Turkey in Asia	—	—	12
					Total	—	2,703	10,487
	(v) Spirit, perfumed, in wood or in bottles.	3,558	36,995	42,475	Austria-Hungary	85	275	417
					Belgium	403	4,706	8,673
					France	171	988	2,207
					Germany	—	2,230	1,757
					Holland	—	—	46
					Italy	26	55	—
					East Coast of Africa—Zanzibar	—	101	2
					United States	—	192	659
					China—Treaty Ports	—	2	—
					Total	685	8,549	13,761
	(vi) Other sorts	—	31,173	36,569	Austria-Hungary	—	132	577
					Belgium	—	542	37
					France	—	14,812	168
					Germany	—	779	14,858
					Holland	—	—	48
					Italy	—	140	12
					Egypt	—	—	5
					United States	—	—	8
					Persia	—	—	2
					Cochin-China—Saigon	—	15	—
					Turkey in Asia	—	—	38
					Total	—	15,920	15,748
58	Stationery, other than paper.	171,177	232,183	289,525	Austria-Hungary	5,021	15,476	20,085
					Belgium	608	4,931	8,806
					France	845	1,061	2,636
					Germany	256	5,550	11,996
					Greece	—	—	2
					Holland	—	871	268
					Italy	217	21	967
					Turkey in Europe	—	—	1
					East Coast of Africa—Zanzibar	—	34	—
					Egypt	5	2	15
					United States	159	54	1,516
					Arabia	46	—	3
					China—Treaty Ports	20	5	45
					Cochin-China—Saigon	6	—	—
					Japan	21	26	3,314
					Java	—	3	—
					Persia	1,219	1,690	888
					Siam	1	—	—
					Turkey in Asia	295	2	—
					Total	8,719	29,726	50,542
59	Stone and marble	17,927	33,237	86,601	Austria-Hungary	8	—	149
					Belgium	925	1,066	2,941
					France	85	135	801
					Germany	—	—	291
					Italy	6,030	7,565	13,406
					East Coast of Africa—Other ports	—	—	58
					Réunion	—	—	693
					Other countries in Africa.	—	—	28
					South America	863	195	2,254
					United States	—	—	184
					Arabia	1,515	2,109	2,456
					Celebes	—	—	15
					China—Treaty Ports	—	—	130
					Japan	—	—	4
					Java	—	130	30
					Mekran and Sonmiáni	4	3	—
					Siam	—	—	1
					Total	9,427	11,203	23,441

No.	Commodity.	Total Value of Importation.			Value of Importations from Foreign Countries.			
		1884-85.	1889-90.	1894-95.	Countries.	1884-85.	1889-90.	1894-95.
		Rx.	Rx.	Rx.		Rx.	Rx.	Rx.
61	Sugar, refined	—	—	2,835,960	Austria-Hungary	—	—	9,325
					France	—	—	1,000
					Germany	—	—	345,144
					Italy	—	—	24
					United States	—	—	3
					China—Treaty Ports	—	—	2
					Java	—	—	168,037
				**	Persia	—	—	14
					Russia in Asia	—	—	12
					Siam	—	—	1
					Total	—	—	523,562
62	Telegraph, materials for construction of—	—	—	1,907	Belgium	—	—	130
—	Toys and requisites for games.	122,437	135,862	187,958	Austria-Hungary	7,921	14,397	6,933
					Belgium	9,248	8,663	17,900
					France	6,253	4,928	4,787
					Germany	464	5,094	24,986
					Holland	* —	80	3,655
					Italy	2,284	1,561	1,544
					Norway	—	—	111
					Turkey in Europe	2	—	—
					East Coast of Africa—Zanzibar	24	8	—
					Egypt	—	7	3
					United States	132	219	1,297
					Arabia	1	12	—
					China—Treaty Ports	5	56	230
					Cochin-China—Saigon	5	—	—
					Japan	171	659	632
					Persia	109	204	4
					Siam	—	—	9
					Turkey in Asia	2	61	—
					Total	26,621	35,949	62,041
63	Wines: (i.) Champagne	104,275	108,600	100,255	Austria-Hungary	347	182	—
					Belgium	554	542	13,005
					France	7,206	14,312	15,176
					Germany	26	264	138
					Holland	27	—	—
					Italy	515	141	100
					Réunion	12	—	—
					Cochin-China—Saigon	—	15	5
					Mekran and Sonmiani	2	—	—
					Total	8,689	15,406	28,424
	(ii.) Claret	91,351	61,175	45,864	Austria-Hungary	197	1,706	1,138
					Belgium	—	64	89
					France	19,554	14,266	21,502
					Germany	619	320	754
					Greece	—	80	10
					Holland	—	173	122
					Italy	1,343	2,648	1,264
					Portugal	—	—	33
					Spain (excluding Gibraltar).	—	13	—
					Egypt	100	25	53
					Madagascar	—	—	6
					United States	—	—	40
					Arabia	—	1	—
					Cochin-China — Haiphong.	35	—	—
					Japan	—	—	1
					Turkey in Asia	—	13	24
					Total	21,848	19,309	25,031
	(iii.) Port	—	—	75,507	Belgium	—	—	12
					France	—	—	820
					Germany	—	—	741
					Holland	—	—	2
					Portugal	—	—	3,236
					Russia in Asia	—	—	4
					Total	—	—	4,815

No.	Commodity.	Total Value of Importation.			Value of Importations from Foreign Countries.			
		1884–85.	1889–90.	1894–95.	Countries.	1884–85.	1889–90.	1894–95.
		Rx.	Rx.	Rx.		Rx.	Rx.	Rx.
63	Wines—*cont.*							
	(iv.) Sherry	—	—	30,392	Austria-Hungary	—	—	154
					France	—	—	214
					Germany	—	—	330
					Italy	—	—	767
					Portugal	—	—	313
					Total	—	—	1,778
	(v.) Other sorts	64,047	71,952	79,940	Austria-Hungary	632	2,508	2,324
					Belgium	738	908	2,830
					France	7,409	11,322	18,523
					Germany	940	1,476	2,211
					Greece	—	157	184
					Holland	358	959	2,572
					Italy	1,918	3,961	4,117
					Portugal	—	315	1,104
					Spain (excluding Gibraltar).	—	106	—
					Turkey in Europe	—	—	16
					Egpyt	50	6	222
					Other countries in Africa.	20	—	—
					United States	—	3	6
					Arabia	—	—	1
					China—Treaty Ports	2	—	—
					Cochin-China—Saigon	6	3	—
					Persia	94	339	41
					Turkey in Asia	45	58	31
					Total	12,209	22,106	34,182
64	Wood, manufactures of	—	51,931	47,383	Austria-Hungary	—	344	228
					Belgium	—	617	—
					France	—	12	2
					Germany	—	309	675
					Italy	—	6	39
					East Coast of Africa—Mozambique	—	—	2
					Zanzibar	—	78	500
					Egypt	—	74	3
					United States	—	250	125
					Arabia	—	202	153
					Japan	—	675	3,171
					Mekran and Soumiáni	—	3	3
					Persia	—	68	12
					Russia in Asia	—	128	—
					Siam	—	—	12
					Sumatra	—	16	—
					Total	—	2,782	4,985
65	Wool, raw	61,821	136,744	132,419	Austria-Hungary	15	—	—
					Arabia	1,282	1,904	1,043
					Mekran and Soumiáni	13,095	23,381	22,850
					Persia	46,461	103,722	103,882
					Turkey in Asia	38	1,585	—
					Total	60,891	130,592	127,775
67	Wool, manufactures of:							
	(*a*) Piece goods	—	1,039,897	1,103,183	Austria-Hungary	—	101,260	108,116
					Belgium	—	19,164	14,475
					France	—	9,110	26,258
					Germany	—	91,090	261,963
					Holland	—	—	5,302
					Italy	—	2,059	360
					Abyssinia	—	—	3
					East Coast of Africa—Zanzibar	—	—	41
					Egypt	—	—	9
					Arabia	—	43	205
					Cochin-China—Saigon	—	—	113
					Japan	—	8	4
					Persia	—	1,432	891
					Turkey in Asia	—	—	3
					Total	—	224,166	418,243

No.	Commodity.	Total Value of Importation.			Value of Importation from Foreign Countries.			
		1884–85.	1889–90.	1894–95.	Countries.	1884–85.	1889–90.	1894–95.
		Rx.	Rx.	Rx.		Rx.	Rx.	Rx.
67	Wool, manufactures of—*cont.*							
	(*b*) Shawls - -	—	234,254	260,382	Austria-Hungary -	—	8,401	69,642
					Belgium - -	—	1,313	8
					France - - -	—	447	386
					Germany - -	—	19,317	62,345
					Holland - - -	—	—	55
					Italy - - -	—	65	—
				**	Egypt - - -	—	210	—
					Arabia - - -	—	—	10
					Persia - - -	—	210	7
					Total - -	—	29,963	132,353
	(*c*) Braids - -	—	51,527	46,153	Austria-Hungary -	—	1,924	27,088
					Belgium - - -	—	3,189	307
					Germany - -	—	968	1,053
					Japan - - -	—	—	85
					Total - -	—	6,081	28,483
	(*d*) Other sorts -	97,602	129,557	129,921	Austria-Hungary -	359	827	2,271
					Belgium - -	145	568	253
					France - - -	66	1,675	283
					Germany - -	338	1,376	15,373
					Italy - - - -	8	84	5
					Turkey in Europe -	25	—	—
					East Coast of Africa—Zanzibar - -	—	30	—
					Egypt - -	11	36	31
					Madagascar - -	—	—	3
					United States - -	—	—	18
					Arabia - - - -	62	265	16
					Cochin-China—Saigon	4	—	—
					Java - - -	—	—	8
					Mekran and Sonmiáni	38	—	—
					Persia - - -	9,196	8,015	3,067
					Russia in Asia - -	—	—	9
					Turkey in Asia - -	735	585	318
					Total - -	10,987	13,461	21,650

APPENDIX 10.

Weekly Average Earnings per Worker, 1908-1912.

(The average amount earned per week by all workers under indenture, men, women, minors and weakly and convalescent immigrants.)

County.	1908.	1909.	1910.	1911.	1912.
Berbice	$ 1·13	$ 1·19	$ 1·18	$ 1·16	$ 1·23
Demerara	$ 1·17	$ 1·22	$ 1·21	$ 1·18	$ 1·23
Essequibo	$ 1·09	$ 1·12	$ 1·10	$ 1·12	$ 1·14

One dollar = four shillings and two pence or three rupees and two annas.

Work and Wages Return. Average Earnings—Men.

Immigration District.	Name of Plantation.	Name of Employer.	Mean number of labourers employed.	Percentage of Working Days.								Average Earnings.	
				Worked by each.	Lost by each by							Per working day.	Per day actually worked.
					Unlawful Absence.	Absence with leave.	Court.	Goal.	Sickness.	Bad Weather.	Holidays.		
No. 1 District Berbice.	Skeldon	Trustees of Estate of John McConnell, deceased.	181	78·6	2·6	3·3	...	·4	14·2	...	·9	18·7	23·8
	Springlands	S. Dayson & Company, Limited.	92	82·2	7·4	2·2	...	·9	5·7	...	1·6	21·3	25·9
	Port Mourant	Plantation Port Mourant, Limited.	221	73·7	3·6	6·4	...	1·1	12·0	·6	2·6	19·2	26·1
	Albion	The New Colonial Company, Limited.	439	76·6	7·0	6·2	...	1·5	7·4	...	1·3	18·3	23·9
	Rose Hall	The Rose Hall Estate, Limited.	402	73·8	9·3	6·1	...	1·2	9·3	...	·3	17·7	23·9
	Providence	S. Dayson & Company, Limited.	77	71·9	11·2	3·7	1	·9	10·4	...	1·8	19 0	26·5
	Friends	The New Colonial Company, Limited.	124	73·7	8·7	5·1	·1	3·2	8·6	·1	·5	21·5	29·1
	Mara	Do.	140	73·9	5·2	4·3	·1	3·3	11·4	...	1·8	17·5	23·8
	Blairmont	The Blairmont Sugar Plantation Company, Ltd.	323	75·2	5·8	3·7	...	1·1	12·7	...	1·5	19·9	26·4
	Bath	S. Dayson & Company, Limited.	24	82·6	...	·5	...	...	14·6	...	2·3	22·2	26·8
No. 2 District, East Coast, Demerara.	Cane Grove	The Trustees of the Estate of John McConnel, deceased.	320	76·3	9·3	4·4	·3	1·0	6·4	...	2·3	19·2	25·1
	Hope	Plantation Hope Sugar Estate Company, Ltd.	227	73·7	13·6	1·6	·1	1·9	5·1	1·1	2·9	17·4	23·7
	Cove & John	The Cove & John Sugar Estate Company, Ltd.	136	78·3	10·8	1·1	·1	·6	7·4	...	1·7	18·4	23·4
	Enmore	The Trustees of Henry Porter, deceased.	304	77·0	11·3	4·6	·1	1·4	4·5	...	1·1	21·6	28·0
	Non Pareil	The La Penitence Estates Company, Limited.	431	77·7	12·1	1·4	·1	1·4	5·4	·6	3·4	20·0	25·7
	Lusignan	The Lusignan Company, Limited.	474	73·6	12·2	1·8	·1	2·4	6·7	·4	2·8	17·3	23·5
	Mon Repos	Arthur Brand ...	142	78·4	2·3	6·7	·1	·6	11·0	·1	·8	19·1	24·4
	La Bonne Intention	Plantation La Bonne Intention, Limited.	185	69·0	18·1	2·3	...	1·2	7·2	·5	1·7	16·1	23·4
	Success	The Success Ressouvenir Company, Limited.	198	78·1	[illegible]	[illegible]	[illegible]	2·[illegible]	[illegible]·1	·8	·6	21·1	27·1
	Ogle	The Ogle Plantation Company, Limited.	281	72·9	13·6	1·7	...	1·9	7·5	·3	2·1	16·7	22·8
No. 3 District (East and West Banks and West Coast, Demerara).	Providence Farm	The Demerara Company, Limited.	14	64·5	19·3	4·9	...	2·4	8·4	...	·5	20 1	31·1
	Diamond		25	87·4	·3	2 0	...	...	8·0	·3	2·0	26·0	29·7
	Wales		189	76 8	6·5	2·2	·1	2·5	1·1	...	1·3	26·0	29·8
	Niamer	[illegible] Ltd.	228	76·3	5·9	2·3	·1	2·8	11·2	·4	1·0	20·1	26·3
	Versailles	The Versailles Plantation Company, Limited.	84	81·4	3·5	2·9	...	1·1	10·9	...	·2	21·5	26·4
	Leonora	Leonora, Limited ...	153	82·4	5·3	1·1	...	·6	9·5	...	1·1	19·9	24·2
	Uitvlugt	The Trustees of Estate of J. McConnell, deceased.	133	84·1	4·4	6·1	·1	·6	3·1	·8	·8	24·3	29·0
	De Kinderen	A. J. McConnell ...	365	79·2	9·5	3·5	·1	2·5	4·7	·2	·3	20·2	25·4
			141	78·0	10·9	3·3	...	2·5	5·3	...	...	20·0	25·6
No. 4 District, (Mahaicony.)	Marionville	The Marionville Plantation, Limited.	189	79·4	4·2	5·7	·1	·7	7·9	1·4	·6	19·6	24·7
	Golden Fleece	La Penitence Estates Company, Limited.	276	79·6	6·2	2·3	...	3·6	8·0	...	·3	17·5	22 0
	Anna Regnia	Do.	237	81·5	5·8	4·7	...	1·2	7·8	·3	·7	19·0	23·4
	Hampton Court.	The Hampton Court Estate Company, Ltd.	141	75·4	11·5	2·7	...	1·1	7·3	·5	1·5	18·7	25·0

The earnings are shown in cents. One cent=half an anna.

Work and Wages Return. Average Earnings—Women.

Immigration District.	Name of Plantation.	Name of Employer.	Mean number of labourers employed.	Percentage of Working Days.									Average Earnings.	
				Worked by each.	Lost by each by								Per working day.	Per day actually worked.
					Unlawful Absence.	Absence with leave.	Pregnancy & Nursing.	Court.	Goal.	Sickness.	Bad Weather.	Holidays.		
No. 1 District (Berbice).	Skeldon	Trustees of Estate of J. McConnell, deceased.	79	48·5	1·4	6·1	29·2	...	...	14·3	...	·5	7·5	15·4
	Springlands	S. Dayson & Company, Limited.	37	64·7	6·7	1·9	13·8	...	·3	11·2	...	1·4	11·0	17·0
	Port Mourant	Plantation Port Mourant, Limited.	84	58·5	2·1	7·5	15·1	·1	·2	14·4	·4	1·7	10·5	17·9
	Albion	The New Colonial Company, Limited.	173	46·6	10·7	6·5	28·7	...	·1	6·1	...	1·3	8·6	18·3
	Rose Hall	The Rose Hall Estate, Limited.	158	50·2	10·8	7·1	18·1	...	...	13·6	...	·2	8·2	16·4
	Providence	S. Dayson & Company, Limited.	31	57·6	6·9	3·2	8·1	...	...	23·9	...	1·2	8·9	15·5
	Friends	The New Colonial Company, Limited.	41	50·9	27·0	3·7	9·0	...	·1	9·8	...	·4	8·5	16·9
	Mara	Do.	53	53·5	15·4	4·0	14·1	...	·2	11·9	...	·9	8·7	16·2
	Blairmont	The Blairmont Sugar Plantation Company, Limited.	127	59·3	11·0	4·5	13·6	...	·1	9·9	·4	1·2	10·1	17·1
	Bath	S. Dayson & Company, Limited.	10	52·7	...	·6	19·2	...	...	19·5	·4	1·6	9·0	15·3
No. 2 District, (East Coast, Demerara).	Cane Grove	The Trustees of Estate of J. McConnell, deceased.	132	58·7	15·2	5·4	14·3	...	·1	4·4	...	1·9	10·8	18·4
	Hope	The Hope Sugar Estate Company, Limited.	91	48·4	20·3	1·4	17·4	...	·2	9·3	·9	2·1	8·0	16·4
	Cove & John	The Cove & John Sugar Estate Company, Ltd.	43	58·5	9·4	1·7	19·8	...	·1	9·4	...	1·1	8·8	15·0
	Enmore	The Trustees of Henry Porter, deceased.	116	45·6	20·1	3·9	27·3	...	·1	3·1	...	·8	9·1	19·8
	Non Pareil	The La Penitence Estates Company, Ltd.	173	56·5	14·6	1·6	19·7	...	·3	3·6	·9	2·8	9·9	17·5
	Lusignan	The Lusignan Company, Limited.	189	57·5	15·9	1·2	18·2	...	·1	4·2	·5	2·4	10·4	18·1
	Mon Repos	Arthur Brand ...	53	58·8	10·2	6·0	13·8	...	·1	10·3	·2	·6	10·9	18·6
	La Bonne Intention.	Plantation La Bonne Intention, Limited.	69	45·7	15·8	1·9	28·8	...	·1	6·6	...	1·1	8·1	17·7
	Success	The Success Ressouvenir Company, Ltd.	66	60·9	5·3	5·5	16·6	...	·1	11·2	·2	·2	9·9	16·2
	Ogle	The Ogle Plantation Company, Limited.	106	50·8	15·3	1·4	18·2	...	·1	11·5	·3	2·3	7·8	15·4
No. 3 District, (East and West Banks and West Coast Demerara).	Providence Farm Diamond	The Demerara Company, Limited.	9	30·9	30·4	6·6	24·1	...	3·3	4·4	...	·3	5·3	17·1
			8	84·5	·3	2·1	·2	...	1·3	9·7	...	1·9	15·2	18·0
			71	60·5	21·4	1·2	5·6	...	·1	10·3	...	·9	10·0	16·6
	Wales	Do.	84	62·7	18·7	1·2	6·9	...	·3	9·4	·3	·5	9·3	14·8
	Nismes	Wieting & Richter, Ltd.	31	55·3	1·3	2·0	22·6	...	...	18·8	...	...	9·1	16·5
	Versailles	The Versailles Plantation Company, Limited.	50	51·8	13·2	1·0	27·6	...	·4	5·4	...	·6	8·8	17·1
	Leonora	Leonora, Limited ...	53	51·5	18·1	4·3	20·0	...	·3	4·1	·6	·6	8·5	16·5
	Uitvlugt	The Trustees of Estates of John McConnell, deceased.	146	43·3	25·1	2·2	24·0	·1	·7	4·0	·4	·2	7·6	17·7
	De Kinderen	A. J. McConnell ...	51	59·4	8·2	3·3	20·4	...	·3	8·4	...	...	9·8	16·4
No. 4 District, (Essequebo.)	Marionville	The Marionville Plantation, Limited.	69	53·6	8·5	4·3	26·3	...	...	5·5	1·8	...	8·7	16·2
	Golden Fleece	La Penitence Estates Company, Limited.	107	56·6	5·5	4·4	28·3	...	·2	4·8	...	·2	9·0	16·0
	Anna Regina	Do.	85	48·4	18·2	6·1	23·4	...	·5	8·0	·2	·2	8·3	17·2
	Hampton Court	The Hampton Court Estate Company, Ltd.	52	34·3	26·9	1·1	32·4	...	...	3·6	·7	1·0	5·5	15·9

AGENT-GENERAL'S COMMENT ON WAGES TABLE EXTRACTED FROM ANNUAL REPORTS.

Paragraph 32.

A short explanation as to how the results are arrived at may not be out of place, more especially as regards the average amount earned "per day actually at work" as in some instances it will be noticed that the earnings under this head are apparently below a minimum of 24 cents for men, and 16 cents for women. The tables referred to are compiled from monthly returns furnished from the pay lists of the Sugar Estates throughout the Colony by the employers to the Immigration Agents who in turn satisfy themselves as to their accuracy on their monthly visits. These pay-lists are framed in accordance with the schedule of the Immigration Ordinance and the presence or absence from work of immigrants for the six days in every week has to be shown. No discrimination is made between a full day's work or a part—every immigrant who turns out to work is regarded as at work during the whole of that day.

Paragraph 33.

As it is a matter of common knowledge that labourers in Sugar Estates do not as a rule, except when factories are at work, do a full day's work on Mondays and but half a day on Saturdays, the system by which immigrants are credited with having been present the whole of six days must necessarily show lower average earnings per immigrant per day at work. There are other causes also, such as the inclusion, under the headings of "Males" and "Females" of invalids, convalescents and "minors" of 10 to 15 years of age, whose wages have been pulled along with those of the ablebodied to the obvious lowering of the average earnings of the latter class.

Paragraph 34.

It will also be observed that the earnings in some districts are much higher than in others. This is not attributable to any difference in the rates paid for work, for the rates appear to me to vary but slightly on estates; nor is it due to a difference in the nature of the soils: it is largely due to the area in rice cultivation in the district. For instance, on the East and West Banks of the Demerara, in Essequibo and in some districts in Berbice large areas of land are cultivated by indentured immigrants who, if they do not themselves own or rent land, assist their countrymen for reward and it is not an infrequent complaint by employers that immigrants leave their work unfinished and go to attend to their rice farms or to help others with theirs.

APPENDIX 10 (*a*).

Ordinance No. 5 of 1911.

An Ordinance to amend the Immigration Ordinance, 1891.

A. D. 1911.

(19th April 1911.)

Be it enacted by the Governor of British Guiana with the advice and consent of the Court of Policy thereof, as follows:—

Immigrant may make declaration that he wishes Immigration Ordinance not to apply to him.

First Schedule.

1. Notwithstanding anything contained in the Immigration Ordinance, 1891, any immigrant born in this Colony may make a declaration in writing, signed by him in the presence of the Immigration Agent General, or any Immigration Agent, to the effect that he desires that the provisions of the said Ordinance shall no longer apply to him. Such declaration may be in the form in the First Schedule hereto: Provided that the person who makes such declaration shall be not under twenty-one years of age and is able to read and write.

Certificate of exemption from Immigration Ordinance to be given.

Second Schedule.

2. On the production of such declaration to the Immigration Agent General, the person making the same shall be entitled to receive a certificate under the hand of the Immigration Agent General in the form in the Second Schedule hereto, and thereupon the Immigration Ordinance, 1891, shall cease to apply to such person and all his rights, duties and liabilities under the said Ordinance shall cease and determine, and he shall no longer be deemed to be an immigrant within the meaning of the said Ordinance.

Personal application for certificate not necessary.

3. It shall not be necessary for the applicant for a certificate under the last preceding section to apply in person to the Immigration Agent General, but it shall be sufficient if the application is made in writing and sent with the declaration by post or by any other person to the Immigration Agent General.

Effect of certificate as to marriages and divorce.

4. Part X of the Immigration Ordinance, 1891, shall not apply to any person who has received certificate under this Ordinance, and from and after the date of such certificate he shall not be deemed to be an immigrant within the meaning of the said Part X: Provided that any marriage registered or contracted, or divorce pronounced, or any other matter or thing lawfully done under the said Part X before the date of the said certificate shall be valid and effectual for all purposes whatsoever.

Immigration Ordinance not to apply to Chinese.

5. Notwithstanding anything contained in the Immigration Ordinance, 1891, the said Ordinance shall not apply to any native of China or the descendant of any native of China.

Interpretation.

6. In this Ordinance, unless the context otherwise requires, the words "Immigrant" and "Indenture" have the same meanings as in the Immigration Ordinance, 1891.

Short title.

7. This Ordinance may be cited as the Immigration (Exemption) Ordinance, 1911.

Section 1.

THE FIRST SCHEDULE.

FORM OF DECLARATION.

The Immigration (Exemption) Ordinance, 1911.

I now residing at an immigrant born in this colony hereby declare:

1. That I desire that the Immigration Ordinance, 1891, shall no longer apply to me and that I shall not be deemed to be an "Immigrant" within the meaning of the said Ordinance for any purpose whatsoever.

2. That I hereby give up and for ever renounce all the rights and privileges that I may have under the said Ordinance, including the right to a return passage to India, and desire to be free from all the liabilities under the said Ordinance.

3. That I (or my father or mother) arrived in this Colony in the Ship on the day of and was indentured to

Particulars of Declarant.

Full Name	...
Father's Name	...
Mother's Name	...
Date of Birth	...
Place of Birth	...
Height	...
Colour	...
Bodily Marks	...
Thumb Print	...

Signature of Declarant.

Signed and declared by the said before me this day of 19 .

Immigration Agent.

APPENDIX 11.

EXTRACT FROM "THE OFFICIAL GAZETTE" OF SATURDAY, 21ST JUNE 1913.

Government Notice.

GOVERNMENT SECRETARY'S OFFICE,

GEORGETOWN, DEMERARA,

20th June 1913.

His Excellency the Governor directs the publication, for general information, of the following report, by H. K. M. Sisnett, Esquire, Stipendiary Magistrate and Special Coroner, appointed by the Honourable the Attorney-General under section 19 of the Coroners Ordinance, 1887, to hold an enquiry into the causes of the deaths at Plantation Rose Hall on 13th March and into the circumstances connected therewith.

By Command,

CHARLES T. COX,

Government Secretary.

Report on the Rose Hall inquiry.

Ord. No. 6 of 1887.

Inquiry by a Stipendiary Magistrate.

British Guiana,
County of Berbice. } To wit.

An inquiry taken at Colony House, New Amsterdam, in the County and Colony aforesaid, on the 20th, 22nd, 25th, 26th, 27th, 28th, 29th days of March; the 7th, 8th, 9th, 10th, 11th, 12th, 14th, 15th, 16th, 17th, 18th, 19th, 21st, 22nd, 23rd, 24th, 25th, 26th, 28th, 29th and 30th days of April, and the 1st, 2nd, 3rd, 5th, 6th, 7th, 8th, 9th, 10th, 13th, 14th, 15th, 16th, 17th, 19th, 20th, 21st, 22nd, 23rd, 28th, 29th, 30th and 31st days of May in the year of Our Lord one Thousand Nine Hundred and Thirteen before me, a Stipendiary Magistrate, and one of the Coroners of Our Lord the King in and for the Colony aforesaid concerning the deaths of Corporal James Ramsay and the following East Indian immigrants, Bholay, male, No. 107, 383, *ex* Ganges, 1908, age 33; Badri, male, No. 110, 328, *ex* Sutlej, 1910, age 26; Hulas, male, No. 108, 888, *ex* Ganges, 1909, age 25; Motey Khan, male, No. 108, 229, *ex* Sutlej, 1909, age 26; Sohan, male, No. 107, 701, *ex* Ganges, 1908, age 33; Sarjoo, male, No. 114, 122, *ex* Chenab, 1912, age 21; Sadulla, male, No. 115, 345, *ex* Indus, 1912, age 23; Jugai, male, No. 90, 609, *ex* Forth, 1901, age 30; Gobindei, female, No. 103, 058, *ex* Erne, 1906, age 32; Gafur, male, No. 108, 014, *ex* Sutlej, 1909, age 27; Juggoo, male, No. 106, 912, *ex* Eme, 1908, age 37; Roopan, male, No. 111, 648 *ex* Indus, 1910, age 25; Durga, male, No. 58, 218, *ex* Avon, 1893, age 72; Lalji, male, No. 96, 504, *ex* Moy, 1903, age 45; and Nibur, male, No. 231, *ex* Berar, 1879, age 75.

The testimony of the witnesses whose names are given on the attached list having been taken. I do now in pursuance of section 33 (2) of Ordinance 6 of 1887 proceed after inquiry for Our Lord the King and after having heard and considered the evidence to say when, where, how, and after what manner the said James Ramsay, Bholay, Badri, Hulas, Motey Khan, Sohan, Sarjoo, Sadulla, Jugai, Gobindei, Gafur, Juggoo, Roopan, Durga, Lalji and Nibur came by their deaths, and I do say that the said James Ramsay on the 13th day of March, 1913, at Rose Hall plantation, in the said county, came by his death from fracture of the skull caused by violence, from some heavy weapon or weapons, unlawfully inflicted by Motey Khan and other East Indian immigrants on the said James Ramsay while in the execution of his duty and while executing a warrant of arrest duly and lawfully issued by Mr. Magistrate Shankland for the arrest of one Ganga, an East Indian immigrant, that the said James Ramsay very soon after his death received other injuries to his head from a rifle bullet which would have been fatal had he not been already dead, and that such injuries were accidentally inflicted by his brother policemen while lawfully defending themselves from a fierce attack by a riotous mob of East Indian immigrants. I base my finding as to the cause of the death

if the said James Ramsay on the evidence of Doctor Barnes, who made a *post-mortem* on the body of the said James Ramsay about 15 hours after his death, and whose evidence is strengthened by the Report (W. 1) of Doctors Wise, Conyers, Wishart and Clavier and by the evidence of Doctors Wise and Wishart and also by the evidence of Colonel De Rinzy, Inspector Baker, Inspector Birch, Mr. Gibson, Mr. Hunter and Mr. Mackay, that Ramsay was beaten before any shots were fired by the police. And I do also say that on the 13th day of March at the said Rose Hall, the said Bholay came to his death from bullet wound of the head; the said Badri came to his death from bullet wound of axillary blood-vessels; the said Hulas came to his death from bullet wound in the abdomen; the said Motey Khan came to his death from bullet wound of head and chest; the said Sohan came to his death from bullet wound of heart and lung; the said Sarjoo came to his death from bullet wound of the abdomen; the said Sadulla came to his death from bullet wound of lung and right shoulder; the said Jugai came to his death from bullet wound of the head; the said Gobindei came to her death from bullet wound of the abdomen; that on the 13th March, 1913, at the Hospital, New Amsterdam, the said Gafur came to his death from bullet wounds of the abdomen, arm and shoulder; the said Juggoo came to his death from bullet wounds in the abdomen; that on the 14th March, 1913, at the Hospital, New Amsterdam, the said Roopan came to his death from bullet wounds of the leg; the said Durga came to his death from bullet wound of the left leg; the said Lalji came to his death from bullet wounds of the back and arm; and that the said Nibur came to his death on the 15th March, 1913, at the Hospital, New Amsterdam, from bullet wounds of the forearm and thigh; inflicted by the Police while lawfully defending themselves from a fierce attack by a riotous mob of East Indian immigrants with sticks, bricks, bottles and cutlasses.

I do also say that the circumstances preceding and which may be deemed to have led up to the riot in which the said deaths occurred are as follows :—

Previous to the 28th January last, there had been no trouble or unrest at Rose Hall among the East Indian immigrants, but on that day the indentured coolies refused to go to work on the ground that they understood that day was to be a holiday. It was a custom on the estate to give 2, 3, or 4 days holidays at the end of the grinding season; and during the grinding season of 1912, the coolies had worked well and the punt-loaders had worked on two Sundays, and Mr. Smith, the Manager, promised four days holidays when the grinding was over. These holidays are quite distinct from and have nothing to do with leave under the Immigration Ordinance. On the 27th January, a week after the grinding was over, the coolies were given holidays and told to clean up the surroundings of their houses. This did not please them. On Tuesday, the 28th January, Mr. Smith changed his mind about the holidays as he found he had some planting to be done, and ordered the indentured immigrants to go to work, telling them he would give them holidays later on. The indentured immigrants did not go to work. Mr. Hunter tried to persuade them to go and some seemed inclined but a certain number of them prevented the others from going. That they were given holidays is borne out by Mr. Fairbairn's evidence that Mr. Smith told him on the 3rd February that he had actually given four days' leave and afterwards changed his mind. On 29th January the indentured immigrants went to work and worked the rest of the week. This incident might have blown over had proceedings been taken against seven of the men who persuaded the others not to go to work. Summonses were served on the seven men on the 1st February—Saturday. This annoyed the indentured immigrants very much. On Sunday, 2nd February, they went and complained to Mr. Smith that all of them had remained at home but only seven were summoned, that all ought to have been summoned. They asked Mr. Smith to withdraw the summonses but he would not. They then the same day went and complained to Mr. Fairbairn, the Immigration Agent in Berbice. Mr. Fairbairn went to Rose Hall next day, the 3rd February, and investigated the matter. The immigrants were very annoyed and excited and accused Mr. Smith of breaking faith with them. It was eventually decided that the 3rd, 4th and 5th should be given as holidays which with the 28th would make the four days promised. At this interview Mr. Smith offered to withdraw the summonses if men paid the costs, the men offered to pay in instalments but this Mr. Smith refused. The cases were proceeded with notwithstanding the 28th, the day the men were charged for not turning out to work on, had been given as a holiday. The cases came for hearing on 4th February, but owing to six of the summonses showing no jurisdiction on their faces, these six were dismissed and fresh summonses issued and all the cases fixed for hearing on the 7th February. About 200 to 300 indentured immigrants attended Court on the 4th February and were in an excited state maintaining that they had been wrongly summoned. On 7th February a still larger number of indentured immigrants attended Court, they were in a nasty temper and threatened that there would be a row if the defendants were convicted and locked up. The defendants were represented by Mr. Eleazar; and after the prosecution in the first case—which was to be treated as a test case—had closed, Mr. Eleazar, after consultation, advised his clients to plead guilty. This was done and the Magistrate—Mr. Douglass—ordered the men to pay three shillings costs each and to be bound over to keep the peace for three months. Costs were paid and bonds entered into. No row occurred. Had the true state of things been put before the Magistrate I do not think he would have convicted. This question of the holidays was a very regrettable one and from then on there has been considerable unrest and dissatisfaction on the estate aided perhaps, but there is no definite evidence of this, by

bad influences, and several complaints are made and strikes occur which had not been heard of before. The indentured immigrants complained that the head-driver Jugmohon took bribes from them for changing their rooms and charged for allowing a man's woman to live in a room with him. Owing to the number—about half a dozen—of men who complained about this same thing, I think, although both the Immigration Agent and Mr. Smith say there was no proof of the truth of the charges, that a more serious effort should have been made to find out the truth. The feeling against Jugmohon became so acute that Mr. Smith previous to 3rd March, removed him from being head-driver but not from the estate notwithstanding, he states, there was no proof of the charges against him (Jugmohon). There were also several strikes for higher wages and other complaints but I cannot find there was anything to justify them,—the wages paid were quite good—they were all settled. Between the 28th January and 4th March although there was undoubted unrest on the estate nothing of a serious nature had occurred, and had nothing else taken place to add to the unrest and dissatisfaction things would probably have fallen back to their normal state. There were also between these dates several instances of bad work and wilful deception and proceedings were taken, which came on for hearing on the 4th March. On the 4th March the indentured immigrants did not go to work and said they were going to hear the cases; their manner was such that Mr. Hunter, the acting Manager, thought there might be a row at Court and telephoned to Inspector Baker to strengthen the police at the Court. Soon after this a number of indentured immigrants went to Hospital at Rose Hall and beat the sicknurse. Mr. Hunter again communicated with Inspector Baker. Inspector Baker went up about 10 A.M., found things quiet and that the sicknurse had not been beaten badly. When the Court opened although there were more immigrants about than usual there were no signs of any disturbance, and I do not think that any would have occurred but for what occurred in connection with the attempted transfer of certain of the indentured immigrants from Rose Hall to other estates.

On 17th February, the Manager, Mr. Smith, applied to Immigration Department for permission to transfer Jangi Khan and his wife, Chotey Khan and his wife, Mathrua, Amir Baksh, and Maula Bux, to other estates, on the ground that these five men were the ringleaders in the then recent troubles at Rose Hall. Permission was given and orders for transfer of these men made out and sent to the Police, who, it seems, have been in the habit of removing indentured immigrants transferred from one estate to another. These orders were sent to the Police Station at Reliance on 2nd March to be carried out, but up to the 4th March, nothing had been done in the matter and the men to be transferred had not been given any warning of their intended transfer. These five men to be transferred were looked up to, and thought much of by the other indentured coolies.

During the sitting of the Court on the 4th March, Mr. Hunter, Inspector Baker and Mr. Fairbairn thought that as the Police had motor cars at the Court it would be a good opportunity to take the transferred men away. An attempt was made to induce them to go; they said they did not have their property and things; they were told these would be sent after them. After some talk Jangi Khan seemed inclined to go and made as if to get into the car, when Ganga caught hold of him and pulled him back saying don't go. The crowd, which had by this time swelled considerably, became excited and threatening in their manner, a large number having sticks. The transfers were not persisted in but the immigrants were in an angry and dangerous temper after the attempt, and it was with great difficulty, although everything was done to pacify them, that Mr. Hunter was got home safely by the Police who had to act cautiously to avoid a conflict.

From this time on to the 13th March the indentured immigrants did no work, got completely out of control, became threatening and defiant in their manner, asked for the dismissal of Mr. Hunter, Jugmohon and the sicknurse; prevented the overseers and drivers from going into the yard (No. 8) to give orders, prevented the free immigrants from going to work. It was only the presence of the Police on the estate which prevented serious trouble. Although no further attempt was made to remove the transferred men the indentured immigrants seemed fearful that an attempt would be made and I find that they had made up their minds that the men could not be removed and that they were determined not to allow them to be removed. This determination was due, in my opinion to advice given by their lawyer. I cannot but come to the conclusion from the evidence of Mr. Shankland, Inspector Baker, Jahoor, Ramatali Khan and Mr. Eleazar, that Mr. Eleazar must have advised the indentured immigrants or those who immediately consulted him, that the transferred men could not be removed by force.

With the immigrants in this frame of mind, on the 13th March, the Inspector-General and the large force of Police go to Rose Hall. Warrants are applied for by the estate and obtained for the arrest of five indentured immigrants, Ganga being one of them, for unlawfully using threats of violence with intent, under section 32 of Ordinance 17 of 1893. About 3. P.M. the Police go to No. 8 yard for the purposes of making the arrests. The attitude of the immigrants is most defiant and threatening on the approach of the Police and just after the Inspector-General's party crosses the bridge between No. 6 and No. 8 yard and gets in front of No. 8 yard an attempt is made by some of the immigrants to dig away the bridge, clearly indicating some previously conceived plan to cut off the Police from retreat that way. Inspector-General tries to explain what he is there for and that he has warrants for the arrest of five men whose names he does not seem to have mentioned, but the noise is too great; the number

of warrants being the same as the number of the transfer men and the immigrants not having any previous knowledge of these warrants, I find that the immigrants thought that the Police had come to take the transferred men. The Riot Act is read, the crowd become a degree quieter and are waved by Motey Khan. The arresting party then go into the yard with Corporal Ramsay at their head, Ramsay holds Ganga, immediately there is a fierce rush at Ramsay and his party with sticks and a fusilade of bottles at him and the main force of Police, Ramsay is knocked into the trench and the attack becoming dangerous the Inspector-General gives the order to fire.

I think it would have been wiser under all the circumstances existing on the 13th March and which must have been known to the estate authorities, had an attempt been made to inform the immigrants clearly who the warrants were for before the Police went to No. 8 yard to execute them; there could then have been no misunderstanding, but whether the results would eventually have been different I have grave doubts.

Whatever may have been the influence at work and which caused the state of unrest at Rose Hall previous to the question of the transfers arising, I am strongly of opinion that had the indentured immigrants not been advised that the transferred men could not be removed by force, the occurrences of the 13th March would not have taken place.

In witness whereof I have hereunto set my hand the 7th day of June, 1913.

H. K. M. SISNETT,

Stipendiary Magistrate and Coroner.

List of Witnesses,

Amir Baksh; Baker, Arthur Hamilton; Barnes, Dr. Walter S.; Bennett, Moses Joseph; Benson, Paul Melton; Bentick, Joseph; Birch, Henry William; Bowen, Hubert Augustus; Chotey Khan; Carto, George Edward; Clavier, Dr. Louis; Conyers, Dr. James Hill; Crawford, Walter Carter; De Rinzy, Colonel; Eleazar, Joseph; Fairbairn, Thomas; Ganga; Gibson, James Clark; Humphrey, Hawtayne; Hunter, Robert B.; Jahoor; Jangi Khan; Mackay, William; McTurk, Wm. Henry; Manly, George Thomas; Massiah, Dr. Edward Seys; Mathura, Maula Bux; Quick, Rev. Thos. Edwin; Rahamatali Khan; Ramlal; Rohlehr; Monteith Dr. John; Shankland, Walter Charles; Smith, James; Wise, Dr. Kenrick S.; Wishart, Dr. Wm. deWever.

H. K. M. SISNETT,

Stipendiary Magistrate and Coroner.

APPENDIX 13.

Agreement of Lease entered into betwixt the Estates Company, Limited, Owners of Plantation cum *annexis, hereinafter called the "Company" and residing on Plantation* cum *annexis, hereinafter called the "Tenant".*

1. The Company agrees to lease to the Tenant a piece of land measuring roods by roods, situate on section of Plantation for a period of ten (10) years with the right of renewal.

2. The Tenant agrees to pay to the Company for the said piece of land the sum of per annum, said rent being payable in advance from the day of , 191 .

3. The Tenant has the right to erect a dwelling house on the said piece of land, but hereby undertakes and agrees not to erect any shop or to carry on any trade or business, on the piece of land hereby leased.

4. The Tenant binds and obliges himself to give four days labour per week on Plantation when called upon to do so by the Company through their Manager or other authorised person.

5. If rent above referred to remains unpaid for six months from the date when it falls due or if the Tenant commits any other breach of the terms of this Agreement, then the Company shall have the right to enter upon and retake possession of the plot of land hereby leased and all buildings and erections thereon without paying any sum to the Tenant by way of damages or compensation for so doing.

In witness whereof the respective parties hereto have signed this Agreement, the Tenant at Plantation in the county of on day of 191 and the Company at the City of Georgetown in the County of Demerara, on day of 191 , and in the presence of the subscribing witnesses.

Witnesses —

NOTE.—The fourth clause is sometimes deleted if the Tenant objects to a definite agreement to give labour.

APPENDIX 14.

Remittances by East Indians to India.

Year.	Amount.			No. of Remittances.
	£	s.	d.	
1891	3,796	14	0	...
1892	3,080	6	10	...
1893	3,061	6	10	...
1894-95	3,880	6	9	...
1895-96	2,046	19	11	...
1896-97	2,735	1	0	...
1897-98	1,967	8	1	...
1898-99	5,886	9	0	...
1899-1900	2,002	5	9	...
1900-01	2,179	8	10	...
1901-02	2,296	9	3	...
1902-03	2,107	11	2	954
1903-04	2,084	11	11	1183
1904-05	1,705	13	4	988
1905-06	1,932	14	3	1089
1906-07	1,870	10	0	992
1907-08	1,697	7	6	815
1908-09	1,702	4	9	913
1909-10	1,951	13	6	817
1910-11	2,269	6	10	931
1911-12	2,721	7	3	859

APPENDIX 15.

DEPOSITS IN SAVINGS BANKS.

Year.	No. of Depositors.	Government Savings Bank.	No. of Depositors.	Post Office Savings Bank.	No. of Depositors.	Total Banks Deposits.
		£ s. d.		£ s. d.		£ s. d.
1891	6,398	107,342 19 9	477	3,380 7 5½	6,875	110,723 7 2½
1892	5,781	109,267 14 9	613	4,048 0 8½	...	113,315 15 5½
1893	6,118	112,780 11 9½	759	5,651 5 8½	...	118,431 17 6
1894-95	5,994	109,553 12 0½	1,040	7,746 14 10½	...	117,300 6 11
1895-96	4,950	94,573 19 7	1,169	8,967 14 1½	...	103,541 13 8½
1896-97	4,520	90,574 18 3	1,175	8,488 0 3	...	99,062 18 6
1897-98	4,444	86,114 16 1	1,193	8,956 5 5½	5,637	95,071 1 6½
1898-99	4,339	87,935 5 4	1,490	11,457 11 5	5,819	99,292 16 9
1899-1900 ...	4,167	85,162 8 6½	1,543	11,792 3 1	5,710	96,954 11 7½
1900-01	4,326	84,935 14 10	1,984	15,186 18 6	6,310	100,122 13 4
1901-02	4,473	88,413 3 2½	1,975	15,221 10 1	6,448	103,634 13 3½
1902-03	4,800	93,879 4 10½	2,242	19,277 15 6½	7,042	113,157 0 5
1903-04	4,924	97,556 2 11	2,572	20,913 13 9	7,296	118,469 16 8
1904-05	4,872	95,941 3 2	2,417	21,384 19 8	7,289	117,326 2 10
1905-06	4,423	87,045 13 2	2,712	28,215 10 4	7,135	115,261 3 3
1906-07	4,659	89,062 4 4	3,032	32,723 14 10½	7,691	121,785 19 2½
1907-08	4,888	85,016 16 0	3,285	36,206 17 2½	8,173	121,223 13 2½
1908-09	5,003	84,246 3 6½	3,553	37,567 16 9	8,556	121,814 0 3½
1909-10	4,968	83,631 17 2½	3,887	44,649 9 0½	8,855	128,281 6 3
1910-11	2,100	31,242 6 4	5,674	86,562 18 6	7,774	117,805 4 10
1911-12	Transferred to the Post Office Savings Bank.		8,214	123,051 6 11½	8,214	123,051 6 11½

APPENDIX 16.

RETURN.

SHOWING THE NUMBER AND ACREAGE OF (1) GRANTS AND HOMESTEADS, AND (2) LICENSES OF OCCUPANCY OF CROWN LAND MADE TO EAST INDIANS DURING THE FOLLOWING YEARS.

Financial year 1st April—31st March.	Grants and Homesteads.		Licenses of Occupancy.	
	No.	Acres.	No.	Acres.
1890-91	...	...	...	...
1891-92	2	150	4	260
1892-93	3	300	1	35
1893-94	2	350	3	250
1894-95	4	310	7	493·50
1895-96	4	350	1	100
1896-97	4	284·42	...	...
1897-98	10	850	...	...
1898-99	63	5,992·63	1	98
1899-00	18	1,440	4	501·12
1900-01	72	5,800·71	28	231·72
1901-02	39	2,171·70	3	155
1902-03	80	1,990	...	...
1903-04	95	3,870·50	7	421·41
1904-05	29	494	17	248·42
1905-06	82	1,743·27	17	3,091·08
1906-07	30	598·21	17	900·10
1907-08	59	1,361·42	11	283·43
1908-09	68	1,188	17	2,140·75
1909-10	28	535	4	328·55
1910-11	59	1,152·03	5	1,140·68
1911-12	36	525·44	4	10·93
1912-13	67	960·38	10	333·66

NOTE.—Grants are practically absolute transfers.

Homestead grants are limited to 5 acres, with restrictions on alienation for a period of 10 years.

Licenses to occupy are leases for a term. The tenure is similar to Indian rayatwari tenure.

APPENDIX 17.

Assessment Value of Landed Property held by East Indians.

Year.	Assessed Value in dollars.	—
1895-96	...	
1896-97	315,196	
1897-98	320,202	
1898-99	328,136	50
1899-00	351,173	90
1900-01	379,797	
1901-02	376,006	50
1902-03	384,528	50
1903-04	428,589	
1904-05	462,462	
1905-06	615,260	
1906-07	699,707	
1907-08	679,259	
1908-09	762,589	70
1909-10	747,378	
1910-11	845,823	20
1911-12	972,761	34

One dollar = four shillings and two pence or three rupees and two annas.

APPENDIX 18.

Approximate number of cattle, etc., owned by East Indians on Plantations.

Year.	Cattle.	Sheep and Goats.
1890	20,631	5,326
1891	20,264	5,619
1892	17,145	3,504
1893	15,228	2,723
1894-1895	13,762	3,380
1895-1896	14,339	4,069
1896-1897	15,779	5,322
1897-1898	14,696	4,114
1898-1899	14,905	4,075
1899-1900	15,247	4,930
1900-1901	14,751	5,111
1901-1902	[illegible]	[illegible]
1902-1903	16,553	5,390
1903-1904	15,506	4,993
1904-1905	14,508	9,185
1905-1906	17,851	6,118
1906-1907	16,568	6,610
1907-1908	15,506	4,918
1908-1909	[illegible]	[illegible]
1909-1910	[illegible]	[illegible]
1910-1911	12,475	3,178
1911-1912	13,384	3,022

[Note by the Immigration Department.]

There is no record in this Department of the number of cattle in places other than Sugar Plantations, and statistics procurable from elsewhere do not discriminate between the races of owners; but the East Indians off estates are proportionately greater owners of cattle than those on estates.

129CID—3,850—10-11-14—GCBP Simla

TABLE No. X.

Reported serious offences, North-West Frontier Province.

District.	1877.	1878.	1879.	1880.	1881.	1882.	1883.	1884.	1885.	1886.	1887.	1888.	1889.	1890.	1891.	1892.	1893.	1894.	1895.	1896.	1897.	1898.
Hazara	64	102	134	83	86	84	79	107	85	111	83	158	162	122	181	150	158	155	168	200	173	178
Kohat	..	..	..	65	110	118	102	87	133	70	147	189	157	102	99	98	145	144	116	130	109	121
Peshawar	130	161	101	118	187	231	277	242	285	238	301	209	204	184	139	163	161	180	176	229	272	348
D. I. Khan	..	..	17	22	44	30	41	..	..	..	68	..	76	..	95	80	79	58	84	102	68	81
Bannu	65	61	60	58	60	70	74	102	62	25	147	148	131	83	108	111	124	127	115	175	139	234
Total ..	259*	324*	312*	346	477	539	523	538†	565†	518†	744	704†	730	491†	572	602	667	664	659	836	759	962

* Less Kohat.
† Less Dera Ismail Khan.

Sections of Indian Penal Code.

307	325-331	364	376	459
304		366	377	460
308		367	392-399	

	1901.	1902.	1903.	1904.	1905.	1906.	1907.	1908.	1909.	1910.	1911.	1912.	1913.	1914.	1915.	1916.	1917.	1918.	1919.	1920.	1921.	1922.	1923.	1924.	1925.	1926.	1927.	1928.	1929.
307	77	77	61	81	52	53	73	64	82	108	195	135	99	81	106	137	122	137	188	235	281	227	255	237	216	273	220	211	215
304, 308	49	44	54	38	60	54	51	71	68	79	93	85	74	78	82	73	82	69	43	61	74	82	77	96	68	108	77	75	91
376	21	17	10	15	18	15	17	14	15	14	20	16	24	22	22	26	19	27	31	24	33	38	47	38	40	43	31	35	33
377	31	22	39	46	41	29	35	36	19	38	43	48	42	22	33	50	55	49	51	50	49	59	68	65	63	70	59	69	68
329, 331, 333 ..	3	2	1	1	} 406	360	393	377	415	420	476	457	429	379	356	396	331	330	339	353	360	336	437	371	421	478	484	523	488
325, 326, 335 ..	395	380	426	412																									
328	25	21	20	19	16	12	8	10	15	5	15	10	10	6	10	4	8	5	9	4	6	8	14	8	9	18	10	10	14
368-369	42	21	24	24	25*	22	37	34	65	37	58	61	66	59	70	80	65	56	107	125	145	94	120	120	113	87	123	136	133
395, 397, 398 ..	70	57	48	44	} 64	42	58	85	75	120	89	94	66	82	258	161	215	101	471	499	428	255	170	51	50	58	52	41	53
399, 402	1	5	..	6																									
394	26	14	14	15	} 50	45	42	50	51	75	88	81	107	103	93	100	123	140	186	233	304	302	219	185	170	166	142	157	169
392, 393	75	71	46	46																									
454, 455, 460 ..	1,021	930	779	793	890†	816	964	1,093	1,011	1,088	1,260	1,146	1,478	1,026	1,057	1,053	1,157	1,418	1,613	1,530	1,767	1,329	1,527	1,434	1,408	1,244	1,276	1,221	1,301
Total ..	1,745	1,675	1,522	1,540	1,622	1,438	1,677	1,834	1,817	1,984	2,337	2,133	2,395	1,858	2,037	2,180	2,177	2,332	3,038	3,114	3,447	2,730	2,964	2,604	2,558	2,545	2,425	2,478	2,565

* From 1905 includes 372, 373 and 371.
† Includes 449-452 from 1905.