

Exporter^{and}Importer

April-1938

Vol 1 No. 7

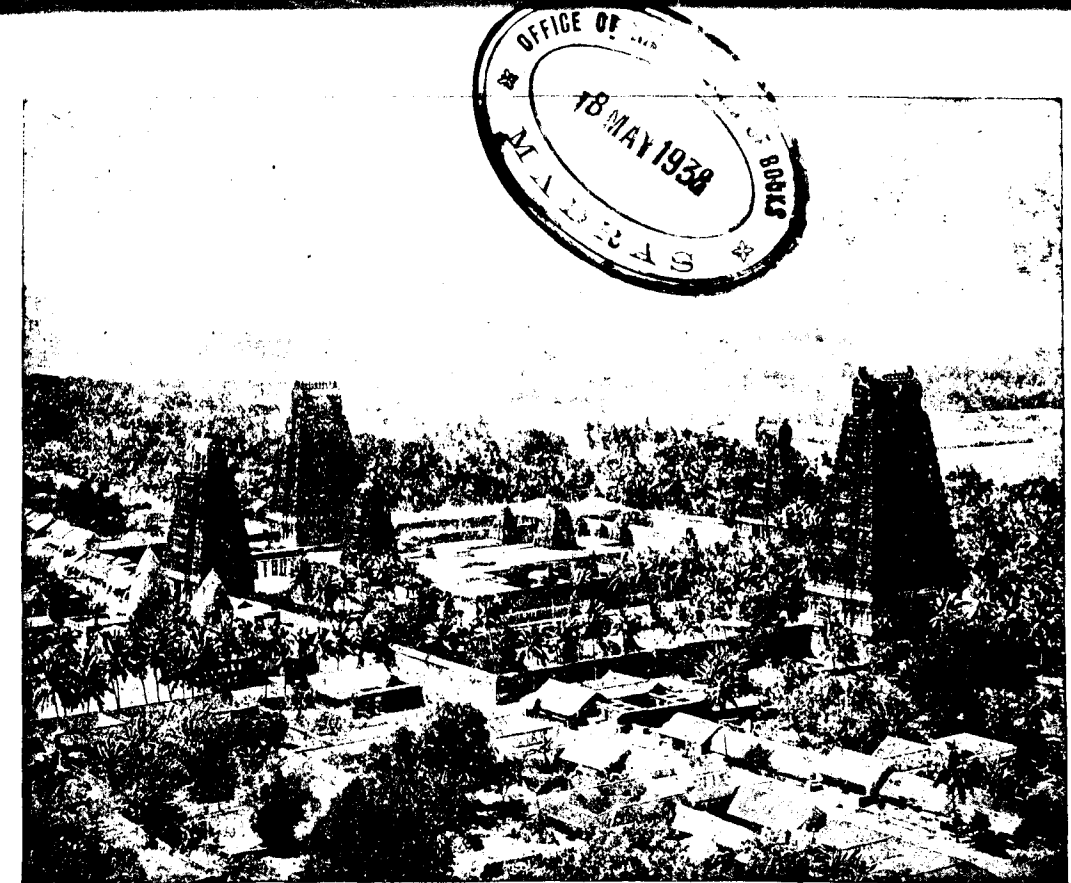
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Importer" in different territories.
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VOLUME ONE NUMBER SEVEN

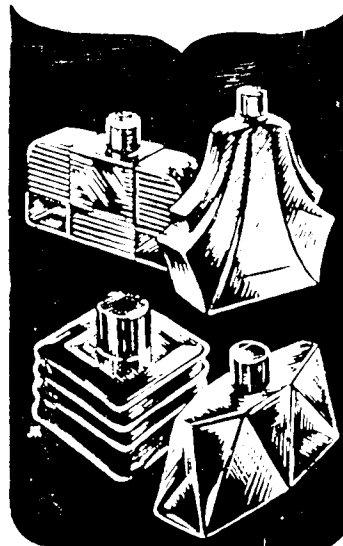
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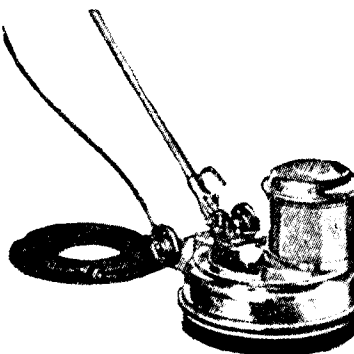
WILLI LORENZ
Scawarzenberg (Saxony)
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Window Envelope Machines

Envelope Printing
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Machines

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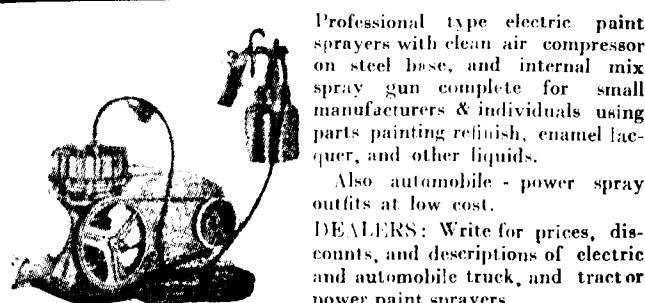
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Fast Sprayers

and mounts for Scent
Sprayers without bottles
in Gold, Silver, Chrome
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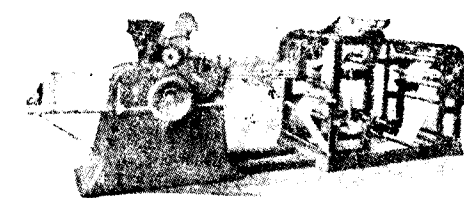
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April 1938

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Output 1,000 Bags per minute.



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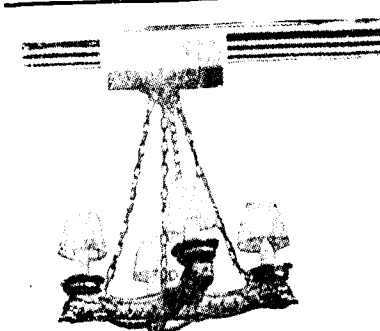
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for manufacturing
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for all beverages, ice, and
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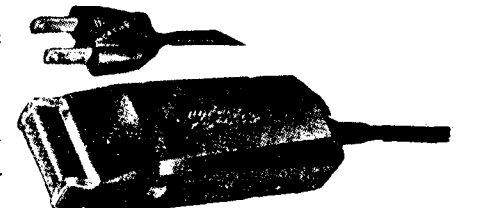


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**Kitchen Machine with
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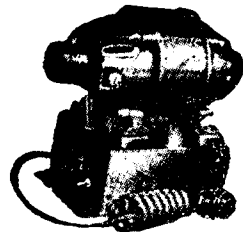
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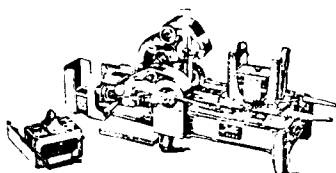
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NEW LATEX NOVELTY BALLOONS

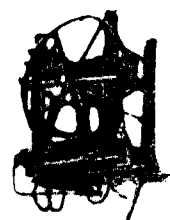
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on the typewriter

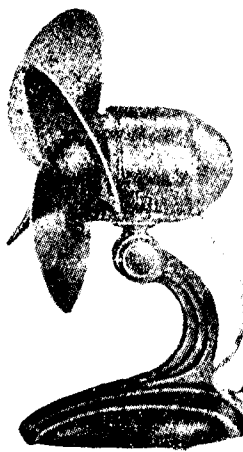


Machine
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J. P. ETZEL
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Automatic Machine for making
Bottle Casings Mod.

ZEUS CIGARETTE FILTER



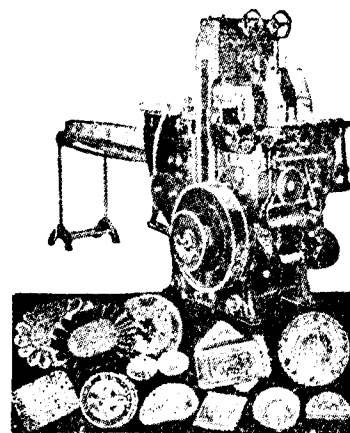
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as 20 Cigarettes. ZEUS CORP. New York.



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Cable Address: Samuecor, New York

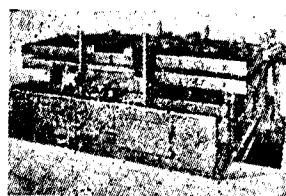


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Torgauer Str. 38.

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Directory of Foreign Exporters U.S.A.

Aircraft and Supplies

Belden Mfg. Co., 4695 W. Van Buren St., Chicago, Ill. Aircraft cables.
Bendix Aviation Export Corp., 30 Rockefeller Plaza, New York, N. Y. Airplane instruments and supplies.
Fafnir Bearing Co., The, 55 W. 42nd St., New York, N. Y. Ball bearings.
Gilbert & Barker Mfg. Co., Springfield, Mass. aviation fuel equipment.
Piper Aircraft Corp. Lock Haven, Pa. Sport planes.
Raywin Airplanes, Kansas City, Kansas, Sport planes.
Snap-On Tool's, Inc., Export Dept., 59-61 Pearl St., New York, N. Y. Aeronautical assembly and Service tools.
Waco Aircraft Co., Troy, Ohio. Cabin and military airplanes.
Weatherhead Co., 300 E. 31st St., Cleveland, Ohio. Dural tube fittings and high pressure hoses.

Air Driven Electric Plants

Allied Radio Corp., 833 W. Jackson Blvd., Chicago, Ill.
Electrical Research Laboratories, Inc., Export Dept., 70 Pine St., New York, N. Y.
Hetro Elect. Industries, Inc., 4611 Revenswood Ave., Chicago, Ill.
Jacobs Wind Electric Co., Inc., Washington Ave., Minneapolis, Minn.
Montgomery, Ward, Chicago, Ill.
Parris-Dunn Corp., Clarinda, Iowa.
Pioneer Gen-E-Motor Corp., 25 Warren St., New York, N. Y.
Sears International, Inc., 3300 Arthington St., Chicago, Ill.
Universal Battery Co., 3400 S. LaSalle St., Chicago, Ill.
Wincharger Corp., Sioux City, Iowa.
Zenith Radio Corp., 6001 Dickens Ave., Chicago, Ill.

Automobiles

American Bantam Car Co., Export Dept., American Steel Export Co., Inc., 347 Madison Ave., New York, N. Y.
Chrysler Export Corp., Detroit, Mich. Chrysler, De Soto, Chrysler-Plymouth and Dodge.
Ford Motor Co., Dearborn, Mich.
Hudson Motor Car Co., Detroit, Mich. Hudson and Hudson-Terraplane.
Hupmobile Motor Car Corp., Detroit, Mich. Hupmobile.
Packard Motors Export Corp., 1861 Broadway, New York, N. Y.
Waco Export Corp., South Bend, Ind.
Waco Export Corp., Toledo, Ohio.

Automotive and Garage Equipment

Allbestos Corp., Export Dept., American Steel Export Co., Inc., 347 Madison Ave., New N. Y. Brake linings and clutch facings.
Edwin D. Allmendinger, 59 Pearl St., New York, N. Y. Power lubricators and lubrication specialties.
American Rubbing Stone Co., The, 136 W. Second St., Cincinnati, Ohio. Rubbing stones.
Asbestosos Corp. Ltd., St. Lambert, Montreal, Canada. Brake linings and clutch facings.
T. J. Atcheson Glass Co., Buffalo, N. Y. Non-shatterable auto glass.
Atlas Mfg. Co., Inc., 123-33 W. Michigan St., Indianapolis, Ind. Replacement parts for Ford, Chevrolet and Plymouth trucks and passenger cars.
Belden Mfg. Co., 4695 W. Van Buren St., Chicago, Ill. Automotive replacement wires and cables.
Bendix Aviation Export Corp., 30 Rockefeller Plaza, New York, N. Y. Brakes, brake springs and linings, brake and mileage auto testing equipment, garage equipment, chassis straighteners, wheel balancing stand, dynamometers, tire treatment equipment and replacement carburetor.
Bienenfeld Glass Works, 1539 Covert St., Brooklyn, N. Y. Safety glass.
Bridgeport Hardware Manufacturing Co., 461-65 Iraniston Avenue, Bridgeport Conn. Automobile tools.
Burton-Rogers Co., 755 Boylston St., Boston Mass. Auto-motive parts, replacement ammeters, aeriads for automobile radios.
Chicago Rivet & Machine Co., 1856 South 54th Ave., Chicago, Ill. Brake relining & riveting machines.
Continental Products Inc., 2030-36 S. Michigan Ave., Chicago, Ill. Replacement parts for Ford, Chevrolet, Plymouth, and Dodge.
Crescent Co., The, Inc., Pawtucket R. I., Export Dept.
Guterman Co., inc., 35 South William St., New York, M. Y. Replacement automotive wiring and cables.
Crowe Name Plate & Mfg. Co., 1763 Grace St., Chicago, Ill. Motor car instrument panels.
Defiance Spark Plug Corp., 333 20th St., Toledo, Ohio. Spark plugs, spark plug compression testers, spark plug cleaner outfits, and automatic starter.
E. I. Du Pont de Nemours & Co., Inc., Wilmington, Delaware, Automobile waxes and cleaners.
Duro Metal Products Co., 2649 N. Kiladare Ave., Chicago, Ill. Auto tools, accessories, and replacement parts.

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E. A. Laboratories, Inc., 696 Myrtle Ave., Brooklyn, N. Y. Auto-heaters, head and tail lights, horns.
 Fafnir Bearing Co., The, 55 West 42nd St., New York, N. Y. Ball bearings.
 Fedders Mfg. Co., Buffalo, N. Y. Automobile radiators.
 Federal Stamping & Engineering Corp., 15 Lafayette St., Brooklyn, N. Y. Automobile reflectors, non-electrical reflecting devices.
 Foglite Products Co., Export Dept., Manufacturers Int'l. Co., 115 Broad St., New York, N. Y. Fog lights.
 Garland Oil Co. of California, 331 Mills Building, San Francisco, Cal. Gasoline, kerosene, fuel and lubricating oils, greases, etc.
 General Industries Co., Elyria, Ohio, Export Dept., 100 Varick St., New York, N. Y. Automobile accessories.
 Gilbert & Barker Mfg. Co., Springfield, Ohio. Gasoline, oil pumps and grease dispensers.
 Harrah Mfg. Co., Bloomfield, Ind. Jack Tool.
 R. M. Hollingshead Corp., Camden, N. J. Polishes, waxes, dressings, greases, brake fluid, motor oil, "Hypoid" gear lubricants, valve grinding compounds, shock absorber fluid and solder.
 Hull Mfg. Co., Warren, Ohio, Automobile compasses.
 International Piston Ring Co., The, Cleveland, Ohio, Piston rings.
 Ivano, Inc. 211 E. 21st St., Chicago, Ill. Locking caps for gasoline tanks.
 Johns-Manville Int'l. Corp. 22 E. 40th St., New York, N. Y. Gaskets.
 • K-D Lamp Co. The Export Dept., 280 Broadway, New York, N. Y. Automobile lamps, stop signals, and mirrors.
 Kar-nu Co., Oakley Cincinnati, Ohio. Automobile refinishers.
 G. J. Kluyskens, 295 Fifth Ave., New York, N. Y. Auto heaters, replacement parts.
 Laher Spring & Tire Corp., 26th and Magnolia Sts., Oakland, Cal. Brake linings, steel replacement springs for autos and trucks.
 Lantz-Phelps Corp., Dayton, Ohio. Automotive service tools, motor analyzers, oil gauges.
 Lion Auto Parts & Mfg. Co., Inc., 1920 S. Michigan Ave. Chicago, Ill. Automotive products, replacement parts, accessories.
 McCord Radiator and Mfg. Co., East Grand Blvd. and Riopelle, Detroit, Mich. Gaskets, radiators, radiators and radiator cores, mufflers, car heaters, lubricators, sealing compound, etc.
 Chas. E. Miller Corp., Meridian, 14th & Main Sts., Anderson, Ind. Tire machinery, full circle retreaders, vulcanizing equipment, tire shop equipment regroovers, power tire wrapping machines.
 Montgomery Ward, Chicago, Ill. Automotive accesso-

ries and parts, spark plugs, garage and service station equipment.
 Morris Motor Products Co., 109 West 64th St., New York, N. Y. Replacement parts for Ford, Chevrolet and Plymouth cars.
 Eoblitt-Sparks Industries, Inc., Export Dept., 295 Fifth Ave., New York, N. Y. Hot water heaters.
 No-Flat Co., Cincinnati, Ohio. Article to prevent tire punctures.
 Oliver Bros. Inc., 421 Canal St., New York, N. Y. Car wax.
 Overhaul Co., 3738 Broadway, Kansas City, Mo. Product for overhauling motors.
 Peck, Stow and Wilcox Co., The, Southington, Conn. Automotive tools.
 John Prior, Inc., 44 Whitehall St., New York, N. Y. Replacement parts, accessories, and equipment.
 Pullman Chemical Co., Camden, N. J. Non-evaporating hydraulic brake fluid and fluid for shock absorbers.
 Radbill Oil Co., 3rd and Berks Sts., Philadelphia, Pa. Motor Oils.
 Reliable Jack Mfg. Co., Dayton, Ohio, Export Dept., Guiterman Co., Inc., 35 South William St., New York, N. Y. Automotive Jacks.
 Remco Products Corp., Export Dept., American Steel Export Co., Inc., 347 Madison Ave., New York, N. Y. Motor car washers, hydraulic presses, wrecking cranes, jacks, creepers, trestles, spray guns etc.
 Riess Mfg. Co., 295, Fifth Ave., New York, N. Y. Automotive tools and garage equipment, wheel aligners and equalizers.
 Russell Mfg. Co., The, Middletown, Conn. Brake linings, clutch facings, belting.
 Rust Master Co., 1 Beacon St., Boston, Mass. Radiator rust cure.
 Samson-United Corp., Export Dept., 377 Broadway, New York, N. Y. Rubber-bladed automobile fans.
 Sears Int'l, Inc., 3300 Arthington St., Chicago, Ill. Automotive supplies.
 Schwarze Electric Co., Adrian, Mich., Exp. Dept., Guiterman Co., Inc., 35 South William Street, New York, N. Y. Electric auto horns.
 Shaler Co., The, Waupun, Wis. Vulcanizers.
 Shurhit Products, Inc., Export Dept., Guiterman Co. Inc., 35 South William St., New York, N. Y. Complete line of ignition parts.
 Simoniz Co., The, 2100 Indiana Ave., Chicago, Ill. Automobile cleaners and polishes.
 Skat Co., 410 New Park Ave., Hartford, Conn. Soap for garage mechanics, auto cleaning pastes and polishes, penetrating oils.
 Snap-On Tools, Inc., Export Depart., 59-61 Pearl St., New York, N. Y. Automotive assembly and service tools, wheel pullers.
 H. F. Staples Co., Inc., Export Dept., 461 Eighth Ave., New York, N. Y. Auto

April
1938

April
1938

EXPORTER & IMPORTER

Sterling Products Co., 2457 Woodward Ave., Detroit, Mich. Air driven sander and rubbing machines.
 Stevens-Wiley Mfg. Co. Inc., Palethorp & Berks Sts., Philadelphia, Pa. Radiator cleaners.
 F. W. Stewart Mfg. Corp., Export Dept., American Steel Export Co., Inc., 347 Madison Ave., New York, N. Y. Speedometer tools and parts; testing and repairing equipment.
 Stewart-Warner Corp., 1824 Diversey Parkway, Chicago, Ill. Auto accessories and appliances, lubrication equipment, vacuum tanks, etc.
 Stow Mfg. Co. Inc., Binghamton, N.Y. Flexible shafts for taximeters, speedometers.
 Sun Oil Co., 1608 Walnut St., Philadelphia Pa. Motor oils.
 Sunnen Products, Export Dept., 1841 Broadway, New York, N. Y. Automotive tools, pin hole grinders, valve lifters, aligners, etc.
 Tokheim Oil Tank & Pump Co., Fort Wayne, Indiana, Export Dept., 38 Pearl St., New York, N. Y. Motor oil and kerosene dispensing equipment, money computer pumps, meter dial & visible pumps.
 Utica Drop Forge & Tool Co., Utica, New York. Wheel pullers and automotive tools.
 Van Norman Machine Tool Co., Springfield, Mass. Shop equipment for automotive service industry and car manufacturers.
 Vichet Tool Co., The 3001 E. 87th St., Cleveland, Ohio. Automotive tools.
 Wayne Pump Co., The, 760 Canal St., Fort Wayne, Ind. Computing pumps, auto lifts, car washers, grease dispensers, gasoline pumps and tanks.
 Weatherhead Company, 300 East 31st Street, Cleveland, Ohio. Automotive parts and fittings: fuel lines, brake fittings and fluid, armatures for automobiles.
 Weaver Mfg. Co., 2171 S. 9th St., Springfield, Ill. Garage and shop equipment.
 Earl Webber Co., 1313 W. Randolph St., Chicago, Ill. King bolt bushing reamers for Ford, Chevrolet and Plymouth, automotive products.

Batteries and Equipment

Bowers Battery Mfg. Co., Inc., Reading, Pa. Storage and batteries requirements.
 Bright Star Battery Co., Clifton, N. J. Dry cells, radio and flashlight batteries.
 Burton-Rogers Co., 755 Boylston St., Boston, Mass. Battery and cell testers.
 Commonwealth Mfg. Co., 4208 Davis Lane, Cincinnati, Ohio. Battery charges for garages.
 Continental-Westinghouse, Export Office, F. C. Stowers, 311 W. 66th St., New York, N. Y. Battery chargers.
 Crescent Co., The, Inc. Pawtucket, R.I. Export Dept.

Guiterman Co., Inc., 35 S. William St., New York, N. Y. Battery cables.
 Cummins Diesel Engine Corp., 724 Garrison Ave., New York, N. Y. Storage batteries.
 Electric Storage Battery Co., 25 West 43rd St., New York, N. Y. Storage batteries.
 Ermet Products Co., 2050 Bloyd Ave., Indianapolis, Ind. Batteries, battery plates, separators.
 Hetro Electrical Industries, Inc., 4611 Ravenswood Ave, Chicago, Ill. Petrol operated battery charges.
 Lyons Storage Battery Co., 2201 E. Ontario St., Philadelphia, Pa. Storage batteries and plates.
 Montgomery Ward, Export Div., 618 W. Chicago Ave, Chicago, Ill. Batteries and battery charges.
 Pier Equipment Mfg. Co., Export Dept., American Steel Export Co., Inc., 347 Madison Ave., New York, N. Y. Battery service equipment, battery chargers and charging racks, testers, etc.
 Price Battery Corp., Trenton Ave. & Ontario Sts., Philadelphia, Pa. Storage Batteries and plates.
 John Prior Inc., 44 Whitehall St., New York, N. Y. Storage batteries.
 Sears International Inc., 3300 Arthington St., Chicago, Ill. Batteries.
 United States Electric Mfg. Corp., 222-228 W. 14th St., New York, N. Y. Batteries, industrial cells.
 Universal Battery Co., 3400 S. LaSalle St., Chicago, Ill. Auto & radio batteries, batteries for farm, light and power. —
 Willard Storage Battery Co., 246 E. 131st St., Cleveland, Ohio. Storage batteries.
 Witherbee Storage Battery Co., Inc., Export Division, 3400 Janney St., Philadelphia, Pa. Storage batteries and plates.

Belting

Alexander Bros., 406 N. 3rd St., Philadelphia, Pa. Export Dept., 11 W. 42nd St., New York, N. Y. Leather belts for regular and complex drives.
 L. H. Gilmer Co., Cottman & Keystone St., Tacony, Philadelphia, Pa. V-Belts, automotive and industrial belts.
 B. F. Goodrich Co., Akron, Ohio. Rubber endless belts.
 Quaker City Rubber Co., Frankford P. O., Philadelphia, Pa. Conveyor and transmission belting.
 Russell Mfg. Co., The, Middletown, Conn. Endless woven belts.

Building and Construction Material

American Rubbing Stone Co., The, 136 W. Second St Cincinnati, Ohio. Rubbing stones, abrasive powders.
 Barrett Co., The, 40 Rector St., New York, N. Y. Coal tar chemicals, smooth-surfaced and mineral surfaced roll roofings, tar and asphalt roofing felts asphalt shingles, protective paints.

prices, both of its raw materials and of its finished products, are formed in world markets by a competitive process which has steadily grown in extent and intensity. Textiles, in fact, are the staples of world trade *par excellence*. From the mills of Japan, the United Kingdom, France, Germany, Italy and other countries there pours forth a stream of textile products converging on the markets of the whole world. The competition among the principal textile exporting countries thus acts as a medium which transmits to the world textile industry as a whole the effects of changes in wage rates, of currency depreciation, of the erection or the breaking down of tariff barriers, etc. In a word, so many countries have become so largely dependent for their economic well-being upon the success or failure with which they carry on one or more branches of textile production and commerce, that the industry may be said to be a true nerve centre of the present system of international economic relations.

In trying to form a picture of the textile industry, it is necessary to think of it as a unified system of diverse but interrelated sub-industries. It is necessary to keep in mind the differences among its several branches based on the use of specific fibres such as cotton, wool, silk, rayon, linen and jute. The branches of the textile industry must also be differentiated according to the principal manufacturing processes—combing and carding, or their equivalent; spinning or throwing; weaving and finishing, including dyeing, bleaching and printing—which are often connected with differences in industrial and commercial organisation. It is also necessary to keep in mind the specific ways in which the several branches of the textile industry react to general economic and social developments and to structural changes, thus giving rise to special social-economic problems in different countries and regions.

A Unified System

However, while keeping these differences in mind, it is essential to regard the textile industry as a unified entity, especially for the purpose of international action. First, the different textile fibres minister substantially to the same groups of economic wants of individuals for clothing, of households for furnishing, and of business enterprises for industrial fabrics. These fibres are thus to a large extent interchangeable. Second, the manufacturing processes employed in producing the different textile fabrics are substantially similar, with the exception of the chemical preparation of rayon yarn. It is significant in this connection that the textile machinery used to manufacture the several fibres is largely interchangeable; while a large part of textile output consists of fibre mixtures. Third, with the exception of a few skilled and special-

lised occupations, the different branches of the textile industry employ substantially a similar labour force. Fourth, the different textile fibres are, subject to limitations of price and fashion, directly competitive with one another. The most striking example of such competition is perhaps furnished by silk and rayon, but wool and cotton also compete as clothing fabrics: wool, cotton and silk as hosiery fabrics; jute and cotton as industrial fabrics, etc. At the same time, the several textile fibres are also complementary. Thus there has been a great tendency in recent years to produce composite fabrics, mixtures of wool/cotton, of wool/silk, silk/rayon, etc. In so far as the several textile fibres are both competitive and complementary, all branches of textile manufacturing become sensitive to the same influences, and common industrial problems are created.

The textile industry, as was said above, is in a process of continuous change. But before considering the changes it has undergone in recent years and is still undergoing, it may be helpful to form a picture of what the industry is to-day.

International Pattern

The most extensive system of world trade relations is presented by the cotton textile industry. But the countries which enter into this extensive system differ widely in the degree of their importance as producers and consumers, exporters and importers. Five countries (the United States, India, China, Egypt and Brazil) produce over 80 per cent. of the total world supply of ginned cotton and supply the bulk of the raw cotton which enters into world trade. All cotton textile manufacturing countries—except the United States, China, Brazil, India, Mexico, the U. S. S. R. and a few others of minor importance—import practically all of their raw cotton. Here is the first link in the intricate chain of trading relationships: almost the entire world is dependent on five countries for raw cotton while these five countries are dependent on world manufacturing activity for the sale of their raw material.

Although cotton yarn is spun almost everywhere only fourteen countries produce appreciable export surpluses. Of these countries, the most important exporters are the United Kingdom, Italy, Japan, China and Czechoslovakia, which together accounted for about 75 per cent. of the world total in 1935. Countries such as the United States, Germany, India, the U. S. S. R., etc., which produce cotton yarn in very large quantities, use it chiefly in their own domestic weaving establishments. The finest counts of cotton yarn are spun in Western and Central Europe, mainly in the United Kingdom which has a large percentage of mule spindles, while capacity to spin lower counts by mass production methods (ring spin-

dles) is concentrated largely in the Far East, India and the United States.

Cotton

Weaving of cotton cloth is carried on in most countries; at the same time, productive capacity is highly concentrated. In 1935 the eight largest manufacturing countries were the United States, Japan, the United Kingdom, India, the U. S. S. R., Germany, France and Italy; these eight countries accounted for over 90 per cent. of total world output. On the other hand the export trade is centred in seventeen countries of which the largest exporters, in the order of volume in 1935, were Japan, the United Kingdom, France, Italy, the United States, India, Belgium, the U.S.S.R., Czechoslovakia, the Netherlands, Germany and Switzerland. These twelve countries accounted for 98 per cent. of the total world exports in that year. At the same time, the importing countries are world-wide. In the markets of final consumption, India, the Far East, Colonial Africa, Latin America, the Balkan and Near Eastern countries bulk very large. In the markets of intermediate consumption and of the improvement trade, the countries of Western and Central Europe are of greatest importance.

In general, all countries exporting cotton textiles are actual or potential competitors in all markets. This generalisation may, however, be qualified in two ways. First, there is a wide range within which the cotton cloth exports of different countries are not seriously competitive because of differences in kind (grey, bleached, printed) and quality (value per square yard or pound). Second, as a result of geographic and economic conditions, commercial policy and tradition, particular groups of cotton cloth exporters compete with special severity in particular markets. Thus, Japan and the United Kingdom are close competitors in India, some of the British Dominions and Africa; Japan, the United States, Italy and the United Kingdom in Latin America; Japan and the United States in the Philippines; Germany, Czechoslovakia and Italy in the Balkans and the Near East; Switzerland, Austria and Czechoslovakia in specialised quality markets, and so on.

Wool

The international pattern of the wool textile industry, like that of cotton textiles, has its own special characteristics. The range of raw wool culture is even wider than that of raw cotton; sheep are raised for the wool clip on a large scale in about sixty countries. The world output of raw wool is largely concentrated, however, in the southern hemisphere and the British Empire, although the United States and the U. S. S. R., are also major producers. Only five

countries—Australia, Argentina, the Union of South Africa, New Zealand and Uruguay—supply the great bulk of the raw wool which enters world trade (over 85 per cent. of the total in 1935). The finer qualities of merino wool, moreover, are supplied in largest measure by Australia and the Union of South Africa.

About 90 per cent. of the raw wool which enters into world trade is taken by seven of the main wool manufacturing countries: the United Kingdom, France, Germany, Japan, Belgium, the United States and Italy. Of all the major manufacturers, only the United States, the U.S.S.R., and Spain are practically self sufficient as regards raw wool.

The semi-manufactures of wool are tops and yarn. Production of wool tops is confined, for all practical purposes, to fifteen countries—the United Kingdom, France, Germany, the United States, Japan, Italy, Belgium, Australia, the U.S.S.R., Czechoslovakia, Poland, Spain, Switzerland, Austria, Yugoslavia. Only seven countries, however, export wool tops in appreciable quantities: France, the United Kingdom, Belgium, Germany, Austria, Switzerland and Austria; the bulk of world exports being supplied by the first two.

Some twenty countries produce wool yarn (on a mill basis) in appreciable quantities; of these countries, eleven export it in substantial amounts—the United Kingdom, France, Czechoslovakia, Germany, Belgium, Japan, Austria, Italy, Switzerland, the Netherlands and Sweden. Exports of wool yarn go largely to countries of Western and Central Europe (especially Germany, Belgium and the Netherlands), and in smaller volume to Asia (notably China and India), to Latin America (especially Argentina and Brazil), and to the Balkans and Near East (e.g. Rumania, Yugoslavia, Turkey).

The weaving of woollen and worsted tissues is carried on in almost all countries, but capacity to produce—measured by power looms as distinct from hand looms—is concentrated in Western and Central Europe and in the United States; in addition, Japan, Poland, the U. S. S. R., Argentina and Australia are important producers. About half of all woollen and worsted exports is supplied by the United Kingdom; the bulk of the remainder by other countries of Western and Central Europe, and to a much smaller extent by Japan.

As in the case of cotton, so in that of wool, many of the channels of trade between importing and exporting countries are well defined. A large two-way trade in woollen and worsted tissues is carried on among all countries of Western and Central Europe both on the import and export side. Import-

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Brasco Manufacturing Co., Harvey, Ill. Store fronts and metal mouldings.
 Phillip Carey Co., Inc., 44 Whitehall St., New York, N. Y. Asbestos materials, roofings, shingles, expansion joints, all types of insulation, water proofings, packings, bridge planks.
 Construction Supplies Co., 500 Fifth Ave., New York, N. Y. Tile floor coverings.
 E. I. Du Pont de Nemours & Co., Inc., Wilmington, Del. Cleaners, finishes for factory ceilings and walls.
 Garland Co., 3748 E. 91st St., Cleveland, Ohio. Finishes for roofs, and inside factory walls.
 International Steel Co., Edgar and Lousiana Streets, Evansville, Ind. Structural steel, revolving doors, etc.
 Johns-Manville International Corp., 22 E. 40th St., New York, N. Y. Asbestos insulation products, building material.
 Lansing Co., 28-30 Van Dam St., New York, N. Y. Barrows and concrete mixers.
 Macbeth-Evans Division, Corning Glass Works, Corning N. Y. Foreign Division, 19 W. 44th St., New York, N. Y. Globes, architectural lighting elements, and glass bricks.
 National Vulcanized Fibre Co., Wilmington, Del. Insulation sheets.
 Overlay Mfg. Co., 574 W. Otterman St., Greensburg, Pa. Architectural sheet iron, sky lights ventilators, metallic frames for doors, door hardware, frames and decorations, dust gathering systems, tin lined doors.
 Owens-Illinois Glass Co., Toledo, Ohio. Glass bricks and insulating material.
 John A. Roebling's Sons Co., 6 Church St., New York, N. Y. Wire screens.
 Samson Cordage Works, 88 Broad St., Boston, Mass. Cord.
 Sterling Products Co., 2457 Woodward Avenue, Detroit, Mich. Air driven sanders and rubbing Machines.
 Stonhard Co., 401 North Broad St., Philadelphia, Pa. Floor repairing and resurfacing material.
 Sweet's Steel Co., Rolling Mills, Williamsport, Pa. Export Dept., 29 Broadway, New York, N. Y. Concrete reinforcing bars.
 Taylor Fibre Co., Inc., Norristown, Pa. Insulating paper.

Cameras and Photographic Supplies

Federal Stamping and Engineering Corp., 15 Lafayette St., Brooklyn, N. Y. Photo enlargers.
 John Prior, Inc., 44 Whitehall St., New York, N. Y. Cameras.
 Sales on Sound Corp., 636 11th Ave., New York, N. Y. Motion picture cameras.

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M. Simons & Son Co., The Inc., 25 Warren St., New York, N. Y. Movie cameras.
 Straight Dry Plate Co., Inc., Jamestown, N. Y. Photo dry plates, tintypes, buttons, developers, etc.

Cigar Lighters

Gordon Mfg. Co., 110, E. 23rd St., New York, N. Y. Cigar lighters.
 New Method Mfg. Co., Bradford, Pa. Gas cigar lighters.
 The Progress Corp., 1 E. 43rd St., New York, N. Y. Cigar lighters, built-in-lighter cigarette cases.

Coin operated Machines

Groetchen Tool Co., 126 N. Union St., Chicago, Ill. Amusement machines, jackpot machines.
 Ideal Novelty Co., 1518 Market St., St. Louis, Mo. Coin operated amusement machines.
 D. Robbins & Co., 1141 De Kalb Ave., Brooklyn, N. Y. New and used vending and coin operated machines and games, peanut and gum machines.
 Supreme Vending Co., 64 Erasmus St., Brooklyn, N. Y. New and reconditioned pin games.
 Rudolph Wurlitzer Mfg. Co., North Tonawanda, N. Y. Automatic disc changing phonographers.

Dry Goods Textiles and Clothing

Barr Rubber Products Co., Sandusky Ohio. Bathing caps.
 Hatleigh, Inc., 197 Greene St., New York, N. Y. Washable, rainproof straw hats.
 Hawkeye Pearl Button Co., Muscatine, Iowa. Buttons.
 Hawley Products Co., 306 W. Washington Street, Chicago, Ill. Tropical helmets.
 Hickok Mfg. Co., Inc., 850 St. Paul St., Rochester, N. Y. Belts, buckles, garters, suspenders.
 International Latex Corp., 350 Fifth Ave., New York, N. Y. Baby pants, bathing caps, swim sets.
 Jagrone Export Co., 200 West 34th St., New York, N. Y. Wearing apparel, millinery, underwear and accessories.
 Marrow Modes Co., 1350 Broadway, New York, N. Y. Women's dressess and linen suits.
 Miss America Brassiere Co., 913 Van Buren St., Chicago, Ill. Brassieres, girdles and corselets; also cotton lines.
 Rossett Mfg. Co., 8 Astor Place, New York, N. Y. Hats and caps.
 Royal Tailors, Inc., 1700 N. Oakley Ave., Chicago, Ill. Wool fabrics, linens, etc., for men's suits.
 Selberling Latex Products Co., Akron, Ohio. Bathing caps.

Indian Section

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AN INTERNATIONAL GUIDE TO BUSINESSMEN

The Textile Industry

AN INTERNATIONAL SURVEY

In the February issue we published a few extracts from the I. L. O. Report on world textile industry under the caption "India's Place in World Textile Industry." In view of India's vital interest in the cotton textile industry, we reproduce in this issue the concluding portion of the first volume of the Report which contains a succinct account of the various textile industries.

The concern about the future of the textile industry explains the present efforts to find new ways and means for its orderly reconstruction on the national scale in different countries. It is also clearly realised that in view of the world-wide ramifications of the textile industry, its rehabilitation and continued growth require measures of an international character as well. The further problem is thus raised of reconciling national and international policies if both are to work towards the same ends and if acceptable and practical programmes of reform are to be evolved and carried out.

It is important, to begin with, to think of the textile industry as in process of continuous change and evolution. The textile industry—as a modern factory industry—is the product of influences at work for more than a century and a half; and these influences are still at work. In general terms, the process may be described as the spread of modern industrial techniques in the making of textiles from their original source in England, first to Western Europe and North America, then to Eastern and Southern Europe and finally to Asia and Latin America. During recent years this process may have been accelerated and complicated by post-war developments. But its underlying character persists and remains essentially unchanged. It is the advance of the Industrial Revolution as it reaches out to new corners of the earth. The advance of the Industrial Revolution, each

new country has tended to begin with the textile industry because of the relatively simple manufacturing processes involved, the availability of an adequate labour supply, and the relatively assured character of a domestic market for a staple product.

As a result of the steady advance of the Industrial Revolution, not only cotton but wool, silk and other textile fibres have been drawn into the factory system, and synthetic fibres, such as rayon, have been added to the list of textiles. While hand-weaving and domestic systems of production continue on a considerable scale in some countries, especially in Asia, the modern factory system of textile production has grown tremendously. Even within the limits defined in this Report, the textile industry is to-day one of the greatest industries in the world. Over 10 million men and women are engaged in its operations, and the value of textile exports is over one-sixth of the total value of all world exports.

Staples of World Trade

Owing to its spread and development, the textile industry has become international in character, more so perhaps than any other industry. Its raw materials are drawn from many countries all over the world. The manufacture of its semi-finished and finished products is extremely widespread. Its products enter into all market outlets from backward colonial areas to the most advanced industrial countries. The

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tant in volume are also the exports from Western and Central Europe to the British Dominions, Latin America, India, the Far East, and the United States. In general, world trade in woollens and worsteds serves consumers at higher levels of income and is influenced in its geographic distribution by climatic factors. The closest competition, on a world scale, is among the United Kingdom, France, Germany and Italy.

Silk

Much simpler than either cotton or wool textiles is the international pattern of the silk industry. Over 75 per cent. of all cocoons are produced in Japan; the remainder chiefly in Korea, China, Italy, the U.S. S. R., and India. Capacity to reel raw silk is likewise highly concentrated in Japan, above all, and in China, Manchuria and India; together these countries account for over 90 per cent. of total world output. Secondary producers of raw silk are the U. S. S. R., Italy and France, and some of the Balkans and Near Eastern countries. Japan, China, Manchuria and Italy supply practically the entire export of raw silk; Japan alone supplies from two-thirds to three-fourths of total exports.

From 70 to 75 per cent. of all raw silk imports are taken by the United States, the bulk of the remainder by France, Japan, the United Kingdom, India, Canada and Germany. By far the largest manufacturer of finished silk textiles is the United States, other important manufacturers are Japan, China, India, France, Italy, Switzerland, Germany and the United Kingdom. Export trade in silk tissues is confined mainly to Japan, France, Italy, and Switzerland. The import markets of Japan are largely in Asia, those of France, Italy and Switzerland are the United Kingdom, the United States, the British Dominions, Latin America, and Western and Central Europe.

Rayon

Although rayon yarn is produced in some twenty countries, over 70 per cent. of the total is manufactured in four countries—the United States, Japan, Italy and Germany—and another 20 per cent. in the United Kingdom and France. The only other producers of consequence are Belgium and the Netherlands. Rayon yarn is largely manufactured for domestic use; less than one-fifth of the output enters world trade. Some thirteen countries export rayon yarn in quantity; of these Italy exports from one-fourth to one-third of the world total. Also important as exporters are Japan, the Netherlands, France, the United Kingdom, Germany, Belgium and Switzerland. The largest market is composed of countries—China and India above all—which lack the chemical equipment to

produce yarn although equipped with looms or knitting machines. On the other hand, some of the major producers of rayon yarn, notably Germany, are also large importers on balance.

Weaving of rayon and staple fibre goods is carried on in nearly forty countries; manufacturing capacity is nevertheless highly concentrated in Japan, the United States, Germany, the United Kingdom, Italy and France. In 1935 these six countries held over 80 per cent. of the world's available supplies of rayon yarn and staple fibre. Japan is by far the most important exporter of rayon and mixed rayon tissues. Other exporters of consequence are France, Germany, the United Kingdom, the United States, Czechoslovakia, Switzerland and the Netherlands. Generally speaking, rayon piecegoods are exported to much the same markets as cotton piecegoods.

Flax and Jute

Flax, the raw material of the linen textile industry, is produced chiefly in U. S. S. R., the Baltic countries and Germany. Most of the flax entering world trade comes from the U. S. S. R.; other important suppliers are Poland, Lithuania and Latvia; and for the finest grades, Belgium. More than half of all flax exports are taken by the United Kingdom, most of the remainder by France, Germany, Czechoslovakia and Japan. The largest producers of linen goods are the Soviet Union, the United Kingdom, France, Germany, Poland, Czechoslovakia and Belgium. By far the leading exporter of linen goods to world markets is the United Kingdom; a secondary group of exporters includes Belgium, Czechoslovakia and the U. S. S. R.; less important exporters are Germany, France and Italy. The United States is the leading import market.

The production and export of raw jute are practically a monopoly of India. Over half of the exports go to the United Kingdom, Germany and France, a fourth to the United States, Italy and Belgium, the remainder chiefly to Spain, Japan, Brazil, the Netherlands, China and Argentina. By far the largest spinners of jute yarn are India and the United Kingdom. Their exports of yarn go mainly to agricultural countries which use jute yarn to manufacture bags and sacks.

The chief producers of jute goods—bags, sacks, etc.—are India, the United Kingdom, a number of countries in Western and Central Europe and the United States; of importance also are some of the countries of Latin America (Argentina and Brazil). Exports, originating mainly in the United Kingdom and India, flow in largest measure toward North South America and to the British Dominions.

Although the production of and trade in textile raw materials, semi-manufactures and finished goods

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affect the economic fortunes of the whole world, such production and trade are of major importance to the economic life of some twenty countries.

Relative Positions of the Different Countries

Of these twenty countries, the United States is by far the largest producer of raw cotton, second only to Australia as a producer of raw wool, and shares leadership with Japan as a producer of rayon yarn. At the same time, it supplies close to half of the raw cotton and is furnished with well over two-thirds of the raw silk entering into world trade. In the field of textile manufactures, the United States is by far the largest producer of cotton textiles, one of the two largest producers of wool and rayon textiles, predominates as a producer of silk textiles, and is one of the leading producers of jute textiles. Although the United States is a minor exporter of textile manufactures, it is the largest importing market in the world for cotton, wool, silk, rayon, linen, jute and hemp goods taken together. Finally, it is the largest consumer of all textile products taken together, both in absolute quantities and *per capita*.

Competing for second place on the list are the United Kingdom and Japan. Because of its deficiency in domestic supplies of textile raw materials, the United Kingdom is much the largest of all the import markets toward which the primary materials for textile manufacturing flow. As an exporter of textile manufactures, the United Kingdom leads by far in the finished products of wool and linen, shares leadership in the finished products of cotton and jute, and takes unchallenged first rank in the semi-manufactures of at least cotton and wool.

Japan, however, is almost an equally important focus of world trade. Like the United Kingdom, Japan possesses enormous manufacturing capacities in cotton, wool, silk and rayon. Japan must import all the textile raw materials, except silk; of the latter primary commodity Japan is the principal supplier to the rest of the world. Like the United Kingdom, Japan sends forth a tremendous stream of textile manufactures to the markets of the whole world, cotton and rayon tissues above all, silk and wool tissues as well. Unlike the United Kingdom—which is a major importing market for at least silk and woollen tissues—Japan is a negligible importer of finished textile manufactures.

Limitations of space make it impossible to summarize the world status of the textile industries of the other major textile countries: Germany, Argentina, Australia, Belgium, Brazil, Canada, China, Spain, France, India, Italy, Mexico, the Netherlands (with the East Indies), Poland, Switzerland, Czechoslovakia and the U. S. S. R. Each of these countries contri-

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butes an important share to the world output of one or more textile raw materials, or manufactures, or both, each has a considerable stake in the world trade in one or more textile raw materials, or manufactures, or both.

Economic Network

A few words concerning the economic network which binds together all these twenty countries will nevertheless help to render the present picture of the world textile industry more complete. First, all of the important textile manufacturing countries lack one, several, or all of the raw materials. The great textile industries of the world have thus been built up largely on the basis of imports of raw materials produced, to a measurable extent, in agricultural countries which are not themselves significant textile manufacturers. Second, there is a specific concentration of productive capacity for each textile fibre: capacity to manufacture cotton textiles is concentrated in the United States, Japan, the United Kingdom, India, China, Germany, the U. S. S. R., France, Italy, Czechoslovakia and Poland; to manufacture wool textiles in the United States, the United Kingdom, France, Germany, the U. S. S. R., Italy, Japan, Spain and Belgium; to manufacture silk textiles in the United States, France, Italy, Japan, and China, etc.

Third, all textile exporting countries compete with one another, to a smaller or greater degree, in one or more market areas. The greatest competition is for the markets of the United States, the British Dominions, India, the Far East, Colonial Africa, Latin America and the Near East. The most important groups of competitors are Japan and the United Kingdom for cotton piecegoods in practically all markets; Germany, France, Italy and the United Kingdom likewise in all markets for woollen and worsted tissues; France, Italy and Switzerland in the richer national markets for silk fabrics; Germany, Czechoslovakia, Austria and Italy for all textile products in the Balkans and the Near East; Germany, the United States, Italy, Japan and the United Kingdom for cotton piecegoods markets throughout Latin America, etc. Although Central and Western Europe are markets of close competition for all textile manufactures, much of the trading in this area is complementary; it involves the movement of goods destined for or having undergone improvement.

Structural Changes

The structure of the world textile industry today is markedly different from that of two decades ago. Great changes have taken place since the World War in the relative position of the countries which coun-

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in recent years imports of cheap Japanese cotton goods have grown rapidly. The United States textile producers also enjoy certain preferential advantages in the Philippine Islands and in Cuba. The remainder of the market for American textile exports is to be found in Latin America. Most of the latter countries maintain foreign exchange control, import quota restrictions and bilateral agreements which favour competitors of the United States, such as Germany, Italy and the United Kingdom. Furthermore, many of these countries, notably Brazil and Mexico, have been engaged on their own account in tariff protection with a view to establishing domestic textile industries.

India

India is also a country where textile mill capacity has been built up with a view almost entirely to the internal market. In recent years, at least, Indian textile mills, particularly cotton mills, have enjoyed tariff protection, not only against Japanese imports, but also against imports from the United Kingdom. Although the United Kingdom enjoys a preferential tariff, textile imports from Lancashire still have to pay fairly substantial duties before they can enter the Indian market. As for Japanese imports, they not only pay heavier duties, but their total volume is regulated in accordance with a trade agreement, whereby Japanese piecegoods are traded, so to speak, in exchange for Indian raw cotton. In terms of population, the Indian market is larger than any other except China. In terms of purchasing power, however, it suffers from serious limitations which cannot be overcome except by an increase in national wealth and income. Nevertheless, India is still to-day, as in the past, the world's largest single market for the cheaper varieties of cotton piecegoods. Exports do not bulk large in the total marketing of Indian fabrics, although the absolute volume of trade with Ceylon, Afghanistan and British colonies in Africa is substantial.

Russia and China

The U.S.S.R. is another country where a large plant and equipment for manufacturing textiles have been built up almost entirely on the basis of the home market which has very large potentialities.

China also possesses a large and growing textile industry, orientated towards the domestic market. Even more than in the case of India, the present possibilities of the Chinese market are limited by the extreme poverty of most of the population. For what the present market is worth, it is a tariff-sheltered market for Chinese mills (many of the most important mills, it must be remembered, are operated by Japanese companies; others by English). Export trade is of little significance, except in cotton yarn. In China,

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as in India, the expansion of domestic manufacturing capacity has precipitated a drastic curtailment of imports, to the detriment of the United Kingdom, Japan, and other former suppliers of yarn and cloth.

France, Germany and Italy

The textile mills of France enjoy access to a sheltered market of the first order of importance. To begin with, there is the home market of France, where high tariff duties and a restrictive quota system both apply. Then there are the French colonies where the commercial policies in force make it very difficult for any but French textiles to be marketed. On the other hand, the French textile industries are very definitely export industries, and have been very hard hit in recent years, particularly as regards wool and silk goods, as a result of the economic crisis and of commercial and monetary policies the world over. France has been able to save her export trade, particularly in cotton cloth, mainly by developing her colonial markets.

The domestic markets of Germany and Italy are sheltered for the benefit of home textile mills by means of an elaborate control of foreign exchange, combined with bilateral trade agreements. In many foreign markets, moreover, exports from Germany and Italy enjoy substantial advantages, thanks to the policies mentioned above. On the other hand, in some of the countries where Germany and Italy enjoy advantages—Latin America, the Balkans, the Near East—programmes aiming at the establishment of national textile industries are being vigorously pursued. At the same time, the textile industries of Germany and Italy have been seriously hampered by the difficulty, attributable mainly to foreign exchange restrictions, of obtaining adequate supplies of raw materials at reasonable cost. In both countries, imports of raw materials have been restricted and efforts made to develop synthetic textile fibres; while the very bilateral agreements which open up export markets for finished textiles often necessitate the purchase of raw materials, usually of inferior grades, at prices substantially above world market quotations.

Protective tariffs, quotas, and preferential arrangements have undeniably given individual countries special advantages in the international trade in textiles. On the other hand, the competitive advantages thus bestowed have been offset, in whole or in part, by other factors in international competition, such as comparative currency devaluation, commercial organisation capital charges, machine efficiency, and labour costs.

Currency depreciation, which was an extremely important influence between 1931 and 1933, has become less and less important since. Undoubtedly some countries, especially Japan, have benefited from

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efficient organisation, lower shipping charges, more strategically timed purchase of raw materials, more intensive use of available plant and equipment, more sensitive responses to shifts and changes in demand. But the most important factors in the international competition for textile markets have been currency devaluation and differential labour costs. Japan in particular owes its expansion in textile exports to these factors; they have enabled her not only to win and hold older markets but also to tap and exploit what might have otherwise remained a latent demand among low-income groups.

Labour Problem

While labour costs are important from the economic point of view as elements in total production costs, and thus as determining factors in the competitive position of individual countries, the labour aspects of the textile industry are even more important from the human and social point of view. From its very beginnings, the textile industry has presented special problems for the men, women and children whom it employs. The structural changes and competitive struggles described above have greatly aggravated the labour problems of the industry in all countries.

Composition of Labour Force

Owing to various technical and social-economic factors, the labour force attached to the textile industry is everywhere characterised by unusually high percentages of women, young persons and semi-skilled workers. For example, nearly one-fourth of the textile workers in the United Kingdom are under 21 years of age, while in Japan almost half are less than 20 years old.

The special composition of the labour force in the textile industry has an important bearing on wage rates and earnings. In general, despite some exceptions, average hourly wage rates are lower for the textile industry than the corresponding national averages for all industries. Both women and men generally receive less per hour as textile workers than as workers in manufacturing taken as a whole. The same is more or less true of weekly earnings, though they vary in the several branches of the industry.

Wage-rates

As compared with other industries in the same country, textile manufacturing is generally a low-wage industry, whether low wages be taken to signify relatively low wage-rates, relatively low weekly earnings, or both. As between different textile countries, differences in wage-rates are very large. When the wages paid in different countries are measured on a common gold basis, the textile

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countries fall into three main groups: (1) a "low wage" group including China, Japan and India; (2) a "medium" wage group including Central and Western Europe, and (3) a "high wage" group composed of the United States and Canada. Within each group there are important differences as between individual countries.

The international variations in wage-rates are the result in part of differences in the specific productivity of textile workers and of the general level of productivity in different countries. In part, they are attributable to differences in the composition of the labour force, in collective bargaining strength, in the degree of State protection, etc.

Hours of Work

Hours of work are closely related to wages, from the point of view of production costs as well as of total earnings and standards of living. The normal statutory hours of work in different countries vary considerably.

In general, the textile producing countries may be divided into three groups, according to whether the regulation normal hours of work are above, equal to, or lower than 48 in the week. The first group of countries in which the normal hours exceed 48 in the week includes China, India and Japan. The second group of countries in which normal hours are 48 in the week includes Austria, Belgium, Brazil, Canada, Czechoslovakia, Estonia, Germany, Great Britain, Mexico, the Netherlands, Poland, Rumania, Spain, Sweden and Switzerland. The third group includes countries in which the normal hours are less than 48 in the week, such as Australia with 44 hours, France with 40 hours, Italy 40 hours, New Zealand 40 hours, the United States 40 hours and the U. S. S. R. 7 hours a day.

There are also large differences between countries as to the interpretation of what normal hours are, as to the time allowed for cleaning spindles and looms, as to the right to compute hours over a period of several weeks or months in the year, as to the kind and extent of exceptions allowed for overtime purposes, as to the payment for overtime, etc. Of special importance are the differences in different countries with regard to work in shifts. Of considerable importance also as affecting the total number of working hours in the course of the year are the provisions in different countries with regard to the weekly rest, to the number of public holidays and to the annual holidays with pay which are legally provided for. In view of the fact that the textile industry employs a large number of women, of some importance also are the regulations in different countries with regard to maternity leave and other measures taken to protect the health and well-being of women, such as the regulations concerning night work.

In general in recent years, partly as a result of the depression, partly for other reasons, the tendency has been for the number of hours actually worked in the industry to decrease. Again, the countries for which data are available may be arranged in three groups according to hours actually worked. In the first group are China, Japan, and India, where the working day ranges between 8½ and 11½ hours. The second group includes Austria, Switzerland and the United Kingdom, with a working week of between 45 and 48 hours. The third group includes Germany, the United States, France, Italy, the U. S. S. R. and Poland where the working week is 40 hours or under.

Conditions of labour in the textile industry are characterised not only by relatively low wages but also by irregular employment, considerable short-time work and extensive total unemployment.

Employment Conditions

The available statistics, imperfect as they are, clearly show that there has been considerable unemployment in the textile industry in recent years. A large part of this unemployment has undoubtedly been due to the economic depression. In fact, the figures available do not give complete picture of the effects of the depression as reflected in unemployment in textile industry, for they do not show except in a few countries the existence of short-time work or partial unemployment which seems to have been more widespread in the textile industry than in industry as a whole. Cotton textiles, it would appear, suffered much more from unemployment than other branches of the industry.

Aside from cyclical unemployment, the textile industry has experienced a certain amount of technological unemployment in many countries. Mechanical improvements in the textile industry in recent years have been making rapid headway as in other industries. Automatic looms have been replacing non-automatic looms, high-speed spindles have supplanted low speed spindles, etc. Moreover, work loads have shown a tendency to increase and the pace of manufacturing operations a tendency to accelerate, with the result that textile workers everywhere have been complaining of the "speed-up" and the "stretch-out." Some of the unemployment in the cotton textile industry has been partially offset in particular countries by the

expansion of newer branches of the industry, such as rayon. The employment of textile workers has also been affected by the structural changes described previously.

Distressed Areas

As a result of the structural changes referred to there have come into being in a number of countries and regions—notably in Lancashire in the United Kingdom, and in New England in the United States—"distressed area" or "stranded communities" characterised by unemployment, irregular earnings, and declining standards of living. On the other hand, some of the countries and regions in which the spread of the textile industry is largely responsible for the above dislocations, show many of the features of a first rapid industrialisation; low wages, long hours, very high employment of women and young persons. In short, the struggle for textile markets has become accentuated to such an extent as to threaten labour standards the world over, and world economic relations in general.

Over Production or Under Consumption?

One proposed solution for the ills of the world textile industry consists in schemes for curtailing productive capacity. Aside, however, from "distressed areas" which may be regarded as regions of excess capacity, the major problem of the textile industry is hardly one of "over-production." The consumption of textile goods in many countries in all parts of the world is still much below what may be regarded as a reasonable minimum, and below what fairly well-paid workers in a few countries already are in the habit of consuming. All the available evidence shows that as incomes of the workers increase, their purchases of textile goods for personal and household use also increase. In short, the potential demand for textile goods is to-day, as in the past, considerable.

National action with regard to labour standards in the textile industry calls in large measure also for international action. From the economic as well as from the social point of view the problem is the same; international co-operation is required in a common programme which will promote the orderly development of the textile industry in different countries and secure decent living standards for the workers in the industry.

1937 Automotive Service Industries Show, Chicago

Biggest and best ever held is the verdict on the Automotive Service Industries Show held in the vast Navy Pier in Chicago from December 6 to 11 inclusive, sponsored and participated in by the National Standard Parts Association, the Motor and Equipment Manufacturers Association and the Motor and Equipment Wholesalers Association.

More than 1,000 booths covering 11,000 square feet were occupied by 372 exhibitors with an almost overwhelming array of thousands of attractively displayed automotive parts and accessories, shop equipment and supplies. The city of Chicago spent 120,000 dollars in conditioning extra space never before used and preparing the pier for the show.

Manufacturers and jobbers from all parts of North America and wholesalers from many overseas countries in larger numbers than ever before taxed the accommodations of the city's thirty hotels and set a record attendance at the show, which was open throughout the week to the members of sponsoring associations and during the last three days to jobbers and overseas visitors.

Conventions of the associations were held at the hotels where their headquarters were located. Annual elections of officers resulted in the election of V. C. Hossellman president of the National Standard Parts Association, F. G. Wacker president of the Motor & Equipment Manufacturers Association and G. F. Johnson president of the Motor & Equipment Wholesalers Association.

With merchandising emphasized at the convention and the show, enthusiasm and confidence ran high, sales were good and optimism regarding business prospects for 1938 was everywhere evident. In the following pages a survey of characteristic exhibits in the show is given.

The Van Norman Machine Tool Co. showed among its shop machine tools an entirely new heavy-duty boring bar that makes fast cuts and bores cylinder blocks of sizes from the Ford 60 to Mack 10-ton truck engines, finishing them in one cut. It is designated as No. 777 Per-Fect-O. Other machines exhibited were piston, valve and bench grinders, valve refacers, brake drum lathes, and electric drills and sanders. There was also a line of small engine-service tools.

New items in the complete line of vehicle lights and reflectors displayed by the K-D Lamp Co. were two new combination truck marker and clearance lights that reduce the number of bulbs needed from eight to four. One model is streamlined and has a

thick rubber gasket to fit snugly to curvature of the truck body. The other is of turtle-back design. A new fog light that has a 7-inch curved lens and powerful penetration, and an electric flare for emergency use are other new products.

A line of replacement parts for Ford, Chevrolet and Plymouth cars comprised the display in the booth of the Atlas Mfg. Co.

Cutaway batteries showing construction of its thread-rubber and dual-rubber insulated batteries were a feature of the Willard Storage Battery Co. exhibit. Another interesting item was a portable electric check unit designed for checking the entire electrical system of a car and finding the source of starting failures.

Several new fittings assortments were shown by the Imperial Brass Mfg. Co. One was assembled in two steel units of 21 drawers each and contained a total of 2,884 inverted flare Hi-Duty and brass pipe fittings and drain and shut-off cocks. Another assortment, arranged in a single similar unit, contained half the number of the same parts. Others were a glass-jar fittings assortment, a shut-off cock and tool merchandiser and a faucet counter merchandiser. New Imperial products are a choke control with bakelite knob and Imperial all-metal solder and flux.

Spark plugs of both one and two-piece construction and in all types and sizes for all internal combustion engines were shown by the Edison-Splitdorf Corp. A new plug named the Edison Albanite has a built-in leakproof gasket to prevent leakage and compression loss. The gasket is spun on to the shell and makes installation of the plug easier.

Models of its key-type and seal-type engine governors comprised the Hoof Products Co. exhibit. The 1938 series 10 to 50 are carefully calibrated for accuracy individually on an engine coupled to a dynamometer in the laboratory and a definite torque curve drawn for the governor. Thus the truck fleet superintendent is saved the trouble of regulating, setting and checking the governor after installation. A principal feature of the governors is a cantilever spring of leaf construction.

Main features of the Perfect Circle Co. display were a glass case filled with miniature cars emblematic of its standard equipment list, a large punch press punching out samples of its X-90 springs, a machine demonstrating wear of cast iron by raw hide rings on one side and Ferrox surface rings on the reverse, a halved cylinder block showing scuffing of the cylinder walls by five different makes of piston rings while the sixth cylinder showed none by Ferrox

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surface rings, and glass cases containing samples of the new "200" top rings and types of Perfect Circle rings and a piston expander. Another exhibit was a sectioned 1938 Cadillac V-16 engine equipped with the company's rings.

The full line of spark plugs now manufactured by the Champion Spark Plug Co. after 27 years of development and production was on exhibition. It includes all types—eight Utility plugs for passenger cars and twenty-one Extra Range plugs for all engines and operating conditions over temperature variations of 200 to 300 degrees. Also shown was the Champion spark plug tester and portable service stand and plug cleaner.

Silent and roller-type chains for cam-shaft drive to give accurate valve timing were displayed by the Link-Belt Co. An exclusive feature of the Silver-streak silent chains is that they are self-adjusting for wear and do not develop back-bend or whip. The reason lies in the use of spring segmental pin bushings that are straight when assembled in the chain but have enough spring to take up wear of the eye in the link.

New items in the K-D Mfg. Co.'s extensive line of service tools are valve tools for the Ford V-8 60 engine, the No. 875 piston ringer, the No. 5B tool kit, the No. 870 piston ring filer and No. 125 ignition point refacer. Also shown was the company's complete line of valve tools for nearly all makes of cars and trucks, including the No. 920 valve guide puller for the Ford V-8 85.

The Atlas Press Co. featured two new machine tools in its extensive display of service shop lathes, drill presses, shapers, arbor presses and hand tools. Each of these set-ups was demonstrated at work and the new small lathe and shaper elicited much comment. The No. 618 lathe was set up for generator armature reconditioning, while the shaper took all types of cuts on pieces of various shapes.

The Hydromatic bumper jack was introduced as a new addition to the Simmons Mfg. Co.'s line of Silver King jacks in regular and heavy-duty models. It is a simple jack built to raise cars up to 2 tons in weight by the bumper brackets and is easily operated. Other products shown were a full line of replacement mufflers and carburetors for popular cars.

Machines for mixing lacquers and enamels to produce any desired color to match the finish on all American cars produced in the last four or five years were the attraction provided by the Arco Co. They are known as the Arco Production Color Laboratory. With the lacquer machine and the use of gauges and formulas, 925 different colored lacquers can be produced from 16 single-pigment lacquers. The more recently perfected machine for

quick-drying synthetic enamels produces 400 different colored enamels from 15 single-pigment enamel colors.

A heavy-duty Hydrau-Kit and a hydraulic curb jack were new products shown by the American Grinder & Specialty Corp. The former has a 10,000 pound hydraulic unit and all necessary attachments and appliances for doing every kind of body, fender and light frame straightening. The curb jack has a detachable handle and fully enclosed pump unit. The company also showed its tool grinder and portable vises.

Raybestos woven and molded brake linings and Silver Edge lining sets for Ford, Chevrolet and Plymouth cars were prominent items in the booth of the Raybestos Division of Raybestos Manhattan, Inc. Other products in this long-established line are brake blocks, rivets, brake service equipment, clutch facings and packings.

A line of Blue Ribbon superspeed coils was introduced by the Manhattan Insulated Wire Co. The windings are much bigger than those in usual ignition coils and the primary and secondary windings are evenly balanced and well matched to assure snappy starting in very cold weather and good performance in present high-speed engines. Other items shown were Manhattan super coils, battery and ignition cables, cable sets, battery terminals and extension lights.

The Ramsey Accessories Mfg. Co. showed as new products its 10-Up compression ring and 10-Up oil ring. The former incorporates design principles of Ramco spring-type rings for reestablishing and maintaining compression in engine cylinders worn 10 inch and more. The new oil ring combines the multiple-tension principle of the inner expander ring, the inter-slot oil-control feature and the recessed oil-flushing inner ring. Other products shown were snap piston rings for reboring purposes, spring replacement rings for worn engines, aluminum-alloy piston skirt expanders and the Ramconizing machine for mechanically peening the inside of cast-iron and alloy pistons to remove collapse.

Four new Streamliner chassis and gear lubrication dispensing units, a cabinet wall battery housing lubricant drums and air-operated dispensing units, and a full range of cabinet-type units comprising chassis Lubrigun, gear lubricant dispensers, filler pump, spring repacker, oil train, etc., were exhibited by the Lincoln Engineering Co. Dispensing units in the two-unit and three-unit 100-pound Streamliners are air operated. In the two-unit and three-unit 25 pound models one unit is air operated and the others manually operated.

Better visibility devices shown by the Anderson Co. included Rain-Master wind shield wiper blades, Sleet-Master wiper arm attachments and chemical refills and Spot-Master outside mirrors. Also Ten-Edge hand glass cleaners having a rubber squeegee on one side and a copper-alloy cleaning element in a felt pad on the other side. This last device is used with plain water for cleaning all glass in a car and also chromium trimmings.

The central theme of the Automotive Specialty Corp. display was its new A Step Ahead trade mark symbolizing the advancement made in its twenty years of specializing in the manufacture of starting, lighting and ignition parts. The Tasco condenser is now made water proof so that no current leakage can occur. A change in the winding and magnetic circuit of the Tasco coil has increased the efficiency by 20 per cent.

Automobile and marine horns, fans and the new Aerotherm hot-water heater for cars comprised the exhibit in the booth of the E.A. Laboratories, Inc.

A comprehensive line of shop equipment and accessory replacement parts was shown by Shurhit Products, Inc. For test work there were stroboscopic analyzers, tune-up analyzers, compression testers, condenser testers and timing lamps. For reconditioning accessories the line includes ignition coils, a coil heater, voltage regulators, switches, distributor rotors and caps, starter bolts and washers, car heater brushes and horn relays.

For the electrical system of the car the P. Sorensen Mfg. Co. showed magneto parts, battery cables and wires, starter, switches, generator cut-outs, voltage regulators, ignition coils, condensers, distributor caps and rotors, contact points, ammeters, ignition, testing equipment and bronze bushings, horn relays and automotive wire.

Zecol Wax and Lubaid were featured products of Zecol, Inc. The wax is a polishing compound with which a car can be finished in an hour and that is guaranteed not to be affected by fresh or salt water, salt air or sunlight. Lubaid is a crankcase and top cylinder lubricant that is penetrating and extra oily, keeping piston rings and valves free and having extreme film strength.

Products of the Simoniz Co. displayed in an array of containers included Simoniz, Simoniz Kleener, Lacker Rubb, EZ-2 chromium cleaner, bug and tar removers, rubber dress, penetrating oil, brake fluid and Ivano Gaslox.

The varied line of parts made and exhibited by the Perfection Gear Co. is comprised of cylinder heads, transmission and differential gears and parts, fly-wheel gears, timing gears, silent timing chains, and clutch plates, facings and cover assembly parts.

Double heat-treated cap screws were featured by the Atlas Bolt & Screw Co. These are made from S. A. E. 1035 steel, double heat-treated to give them a tensile strength of 1,20,000 pounds per square inch. One result is a satin black finish instead of a bright finish. Consistently high quality and uniformity are obtained by careful heat treatment at the correct temperature in modern equipment designed for the purpose.

Five new automobile radios having a tuning range from 550 to 1,550 kcs were exhibited by the RCA Mfg. Co. They have magneto core transformers that assure maintenance of the exact factory alignment of the circuits for the life of the sets. Model 8M is the lowest price RCA Victor automobile receiver ever built and has a five-tube chassis and a single universal mounting bracket for installation in any car. The four larger models have six-tube superheterodyne chassis and a new watch-type dial that enables easy tuning while driving.

Safe-flex electric fans made with flexible rubber blades which can injure no one were shown by the Samson-United Corp. in models from 6 inch all-purpose fans that clamp on anywhere to a 24-inch air-cooler. They are made for automobile, home and commercial use, in stationary and oscillating types, with two-speed regulation and in 6 and 12-volt rating. The automobile fan cools the car in summer and prevents steaming or frosting of the windshield in wet or cold weather.

The Torquometer is a new type of pressure measuring wrench featured by the Snap-On Tools Corp. It is designed for tightening bolts and nuts on cylinder heads, main bearings and other parts where uniform pressure is needed. Pressure readings are taken from a gauge in which no springs are used and which has a floating-face dial and stationary pointer, with dial windows on the sides as well as the top. The tool head takes any ½ inch square drive socket or extension handle, and adapter plugs fit the tool to sockets or extensions of other sizes.

Among several models and sizes of precision lathes exhibited by the South Bend Lathe Works, special attention was called to the 9-inch workshop bench lathe. The tool was set up to do valve re-facing, piston refinishing, bushing jobs, screw-thread cutting, armature and commutator truing and other servicing jobs. Other lathes were shown in sizes of 11, 13, 15 and 16-inches swing, each in individual motor drives and countershaft drive types.

An educational feature in the Tuthill Spring Co. booth was a lighted panel showing the positions and shapes a suspension spring takes under different brake applications and conditions of vehicle load and operation. There was also a large picture of the recircu-

lating draw-fire furnace designed and built by the company and entirely new in the production of springs. On a panel board were displayed samples of motor governor springs, helper-spring frame bracs-

kets, washing-machine wringer springs, farm tractor seat standards, airplane tail skids, tire irons, etc.

—*Universal Commerce.*



Beauty & Utility in 1938 Refrigerators

Emulating the proven sales technique of automobile manufacturers and radio companies, the leading American makers of electric refrigerators have adopted the yearly model plan, and have just recently announced the new and improved units for 1938. This plan of incorporating new engineering developments and consumer conveniences in a new series of units once each year not only insures a larger market and enhanced sales appeal as a direct aid to the manufacturer and dealer, but it also gives the consumer the advantage of all the latest improvements at one time.

Many of the 1938 refrigerators, designed for both domestic and export markets, are shown in these pages. All of them have been built to new standards of operating efficiency, and they give the consumer the benefit of many conveniences and increased usefulness. Regardless of size, each individual model has been redesigned for more adequate use of food storage compartments. Quicker freezing, and easier release of ice cubes is a universal feature of these 1938 electric refrigerators, which are described more fully in the ensuing paragraphs.

Crosley Shelvador refrigerators for 1938 are distinguished from earlier models, by refinements in the refrigerating unit and other convenience features. One of these is the Speedcube release which permits quick and easy cube release by a simple lever action. Eighteen points of cold control permit the user to vary the freezing speed and food compartment temperature to suit every need. Extra shelves in the door of the box provide added food storage capacity, and a covered, porcelain enamel container keeps fruit and vegetables from drying out. The Electrosaver refrigerating unit is hermetically sealed, and is designed to provide extremely economical operation. An important model in the Crosley line is the Musical Shelvador which accomodates a specially designed Crosley radio.

An important feature of the new *Fairbanks-Morse* refrigerators is the Conservador, a hinged compartment which fits directly behind the door, giving added, quickly accessible storage space. These Conservador models have, at the bottom of the cabinet, a non-refrigerated storage compartment for beverages.

Refrigerating units in all F-M- models are extremely quiet and economical in operation and the motors are equipped with automatic overload protectors. The cabinets are of white Dulux exteriors, with porcelain enamel interiors, in the modern streamline style. Glass wool insulation is used throughout because of its complete moisture-proofness and heat-retarding value.

Stewart-Warner refrigerators have seven added features that greatly enhance their convenience. Among these are the Sav-a-Step swinging shelf, Slid-a-Tray, a cold storage chest for meats and other foods, and the instant cube tray that eliminates the need for the usual thawing out process. Sixteen points of cold control allow for selection of the correct freezing speed to suit various needs. In the bottom compartment of the cabinet is both the pneumatically controlled Slid-a-tray and the Econ-O-Lite which gives a visual check on the economical performance of the refrigerator. Stewart-Warner refrigerators are available in a wide variety of sizes to fit every household need.

Sears International, Inc. offers the new *Coldspot* refrigerators with the "Rotorite" Current Cutter unit for thrifty operation. This unit has only five moving parts, thus insuring many years of trouble-free service. Important among these new Coldspots are the Models 3816 and 3818, which have such conveniences as the Touch-A-Bar door opener, illuminated cold-control dial, instant cube release, Handi-Bin storage for vegetables, and Foodex divided storage space. Aluminum shelves are used throughout because of their resistance to rust and because dishes slide more easily on them. The cabinets are of all-steel, welded joint construction to eliminate temperature stresses.

Midwest Economy Export Refrigerators have many new and exclusive features to enhance beauty, economy, and efficiency. The cabinets are of all-steel construction and styled in keeping with the modern trend. Ice-cube capacity has been increased about 35% over that of previous models, and the freezing time has been reduced. Mechanical improvements include the Midwest Thermostatic expansion valve, wide-cycle cold control, and direct-drive compression. Midwest refrigerators are available in many different sizes to meet all requirements.

The 1938 line of *Montgomery Ward* refrigerators consists of ten different models ranging from 4 cu. ft. to 11 cu. ft. in capacity. All are equipped with twin-cylinder compressors and automatic overload control for greater operating efficiency. The porcelain-finished interiors are arranged for greater storage capacity, and the ten-point temperature control provides for correct cold control. Improved welding methods are used in building the one-piece cabinets, which are available with either baked enamel or Dulux exteriors. Automatic ice tray releases and other conveniences are included as standard equipment on many of these Montgomery Ward refrigerators.

Actual operating economy of the *Westinghouse* Kitchen proved refrigerators for 1938 was tested and checked in the kitchens of typical residences in 102 localities throughout the world to insure maximum efficiency. Included among the conveniences of these kitchen-tested units are a covered meat storage compartment to conserve moisture, and a Humi-drawer with a glass top for storing vegetables and fruits. Quick-releasing Eject-O-Cube trays are standard on the Emperor and Aristocrat series, as is the adjustable food storage space. These and other Westinghouse models are powered by the sealed Economizer unit with overload protection.



Fairs and Exhibitions

INTERNATIONAL IZMIR (SMYRNA) FAIR, 1938

An International Fair under the patronage of the Turkish Government will be held at Izmir from the 20th August to the 20th September, 1938. It is understood that all goods to be exhibited at the Fair will have the benefit of special licences as regards quota and exchange restrictions. Imported goods are introduced free of customs duty, which is only payable for goods sold. Unsold goods are stored in the transit stores for two months after the closing of the Fair. Free Turkish Consular visa is given to foreign visitors and exhibitors. Pavilions, empty sites and places in the Exhibition Palace are put at the disposal of exhibitors and entertainment concerns at the following prices: Ready Pavilions of 20 square metres, 50-75 T. Liras; Pavilions of 10 square metres, 40-50 T. Liras; sites 0-50 to 1-50 T. Liras per square metre and places in the Exhibition Palace 8 T. Liras, per square metre, the Exhibition Palace 8 T. Liras, per square metre, Those desirous of participating in the Fair may obtain further particulars from the Turkish

General Electric Triple-Thrift refrigerators are of one-piece, all-steel welded construction, and they are insulated with Thermocraft, a specially developed insulation of low heat conductivity which will not pack down or sag. The interior shelves are spaced to give the maximum usable shelf area, and the vegetable tray, freezing unit, and other accessories are arranged for maximum convenience. All G-E refrigerators are equipped with Thriftometers, and one-button cold control for instant temperature regulation, as well as with the triple-feature Quick Tray for speedy and convenient cube removal.

Fifteen models make up the 1938 *Frigidaire* line which was developed after exhaustive field and laboratory tests. The sealed-in Meter-Miser unit insures quiet, economical performance, and the new suspension for the freezing unit has permitted construction changes that add to overall efficiency. Interior shelves have been relocated to provide more storage space, and the Quickcube tray has been redesigned so that fewer parts are needed for the instant release of ice cubes. The freezer units have been reshaped to allow more space, and the nine-way adjustable interior has been retained, making nine complete shelf arrangements possible.—*Universal Commerce.*

Commercial Attache, Queen's Court, 107, Queen's Road, Fort, Bombay.

INTERNATIONAL EXHIBITION OF HANDICRAFTS, BERLIN, MAY-JUNE, 1938

The International Exhibition of Handicrafts will be held at Berlin from the 28th May to the 26th June 1938. The provisional arrangement consists of the following:—

- (1) Hall of Honour of International Handicrafts.
- (2) Cultural and historical show.
- (3) International show of the different nations with workshops.
- (4) Raw materials, auxiliary and tools in handicrafts.

It is understood that the exhibition grounds comprise 9 exhibition halls with a built-over area of approximately 60,000 square metres and an open ground area of about 100,000 square metres. For further particulars, individuals and organisations interested in Handicrafts may get into touch with the Consul-General for Germany, 26 Lee Road, Calcutta.

Quarterly Report of The Indian Government Trade Commissioner, Hamburg

October-December, 1937

Introductory.

In the last quarter of 1937, foreign trade recovered a little from the setback experienced in the third quarter. According to the calculations of the German Statistical Office during this quarter, the total turnover of the foreign trade of 53 countries—which among themselves account for roughly 90 to 95 per cent of the world's trade—increased by 5 per cent in value, and by 7 per cent in volume, as compared to the previous, the third quarter of 1937. The turnover for the year 1937, as a whole, is 16 per cent in value and 7 per cent in volume above the levels for 1936. It would appear, however, that the foreign trade of the European countries has increased more distinctly than that of the rest of the world. Compared to 1936, the foreign trade of the former has risen during 1937 by 7.3 per cent, whereas the turnover of the foreign trade of the remaining countries shows an increase of only 1.6 per cent. In so far as the trade of the latter countries is concerned, the imports of some of the more important countries declined substantially for reasons peculiar to each of them. For instance, the imports of the United States of America declined by 12.2 per cent, the decline being explained by improvement in the home supply of grains, and by reduced demand for raw materials consequent upon the setback in the internal economy early in 1937: the imports of Japan declined by 22.5 per cent and of China by 37.9 per cent, the decline being obviously a direct result of the 'war' between the two countries. The exports of the non-European countries during the fourth quarter have, however, risen, compared to their exports during the previous quarter. British India is an exception to this statement, for her exports during this quarter appear to have declined quite substantially.

The course of India's trade with practically every one of the North European countries under review during the last quarter of 1937 and during the past here year as a whole, confirms the general remarks in the preceding paragraph based upon a broad statistical survey of the foreign trade of the more important countries of the world. While, however, the figures for the fourth quarter are not as satisfactory as might have been wished from India's point of view, the net result of the trade for the whole year would seem to have been distinctly favourable to India.

Austria

The foreign trade of Austria increased appreciably in value during 1937. Compared to 1936 the total imports rose by 169 to 1,453.6 million schillings. While the total exports amounted to 1,216.5 million schillings, representing an increase of 27 per cent. While the total of the foreign trade has thus substantially increased, the balance of trade has improved slightly inasmuch as the import surplus has been reduced from 297.6 to 237.1 million schillings, or roughly by 21 per cent.

Imports from India have increased from 16.1 million schillings to 23.3 million schillings, while exports to India have risen even more strikingly from 9.8 million to 29.1 million schillings. India's share in the Austrian imports has now improved to 1.6 per cent as compared to 1.3 per cent in 1936, while her share in Austria's exports also amounts to 1.6 per cent, representing an increase of .6 per cent. The balance of trade with Austria is still in favour of India, to the extent of 3.2 million schillings, but is virtually half the amount in 1936.

Belgium

Belgium's imports increased from 21,708 million francs in 1936 to 27,662 million francs in 1937. Her exports show a slightly greater proportionate improvement, and amount 25,689 million francs, as against 19,745 million francs in 1936. The trading deficit has thus risen by 10 million to 1,973 million.

The value of India's trade with Belgium has increased considerably during 1937, the imports from India having risen from 637 million francs in 1936 to 966 million francs, and the exports to India from 391 in 1936 to 448 million francs in last year. The balance of trade has thus substantially improved in favour of India. In 1936, India's exports to Belgium exceeded her imports therefrom by 57 million francs only, while during the past year, the excess has increased to 329 million francs.

Czechoslovakia

The total balance of trade in 1937 was far more favourable than in 1936. The value of imports rose to 10.97 milliard kronen compared to 7.91 milliards in 1936, while the value of exports increased from 8 milliards to 11.97 milliards during the past year. The largest advance in exports was recorded in exports of finished goods which improved from 5.8 milliards

to 8.6 milliards. On the imports side, there was an increase in the imports of foodstuffs as well as finished goods, a fact indicative of improved buying capacity of inland consumers. The net surplus of commodity trade for 1937 thus just exceeded one milliard kronen as against a surplus of 91 millions only in 1936.

The distribution of Czechoslovakia's foreign trade according to countries reveals the interesting fact that trade with free countries, that is, countries without exchange restrictions, has increased, whereas that with countries which limit imports by quotas, exchange control and clearing arrangements, has diminished. The structure of Czechoslovakia's foreign trade is characterised by the fact that the imports of raw materials constitute almost 60 per cent of the total imports in volume, while finished goods represent more than 75 per cent of the total exports. The distribution of her foreign trade is naturally affected by this fact, for her commercial policy has to have as its objective the establishing of trade relations with countries which will take her finished articles and provide raw materials in return. The imports during 1937 from the countries with which Czechoslovakia has clearing agreements, accounted for 41 per cent of the total imports as against 47 per cent in 1936, while the exports to these countries has remained steadily at 50 per cent in both the years. Czechoslovakia would appear thus to be "tied down" with regard to roughly 40 per cent of her foreign trade, and her attempts during the year have aimed at increasing her trade with the "free countries" particularly those among them who are exporters of raw materials. How far these efforts have been successful can be gauged from the large number of trade agreements she has already effected. She has such agreements already with Ecuador, Mexico, Argentina, Brazil, Bolivia, Guatemala and Columbia, while she has entered into negotiations for payments agreements with Chile and Uruguay. There are other south and central American countries too with which talks are proceeding but have not yet been completed; instances of these are Paraguay, Venezuela, Honduras and Costa Rica. With Australia and South Africa also Czechoslovakia has trade agreements, while in Europe she appears to have various types of trading arrangements with most countries.

Czechoslovakia's trade with India has resulted in a slightly increased adverse balance for her. Both exports to India and imports therefrom have risen appreciably, the former from 78 to 162 million, the latter from 302 to 471 million.

France

For France, 1937 has been economically a very difficult year. The hopes raised by the second devaluation to which she had to accept, failed to

materialise, and the year ended with a heavy adverse balance, very far short of twice that at the end of 1936.

(In Million Francs)				
	Imports.		Exports.	
	1936.	1937.	1936.	1937.
Foodstuffs	7,997	10,726	2,478	3,373.
Raw materials for ...				
industry	13,787	25,132	4,463	8,427
Finished goods	3,830	6,457	8,551	1,135
				2—
Total.	25,614	42,315	15,492	23,935
Import surplus in 1936=			10,122	
Import surplus in 1937=			18,380	

The imports from India shared in this rise in the total imports and with 1,162 million francs exceeded the milliard mark for the first time. By comparison an increase of 52 million francs in the French exports to India was very small. The visible balance of trade, therefore, improved in favour of India by 330 million francs from 713 million francs to 1,043. In spite of the increase in her total value of trade with France, India has lost one place and for 1937 occupied only the sixth place among the principal exporters to France.

Germany

The characteristic feature of Germany's foreign trade during the past four years has been the conversion of an unfavourable balance into a favourable balance. This was the objective of the "New Plan" inaugurated in the autumn of 1934, and a survey of the development during the last three years shows that the Plan has had complete success in each one of its tasks—the external trade is now "active," exports have increased, making possible considerably increased imports, and a well-planned imports policy governs the imports of raw materials and foodstuffs.

An increase in exports is primarily dependent upon increases in the industrial exports, and these have steadily risen since 1934, and acquired a special impetus in the second half of 1937. The monthly average of industrial exports which stood in 1934 at approximately 330 million Reichsmarks, rose for 1937 to roughly 480 million Reichsmarks. Since the comparison is in terms of value, it should be noted that there has been since 1936 a tendency for the export prices of this class of goods to rise.

Although exports have increased during 1937 by 24 per cent, the export surplus has failed to reach the 1936 figure of 550 million. This was so because imports rose even more steeply than its exports. They reached the figure of 5,468 million Reichsmarks, and were thus more than 30 per cent above the level of

1936. Of this increase, a third may be said to be due to a rise in the import prices, and two-thirds to the greater volume of the article imported. As against this, four-fifths of the increase in the exports is accounted for by actual increase in the quantities exported. The greatest increase in the imports occurred in the foodstuffs group, which shows an increase of 36 per cent in value, and 27 per cent in volume; next comes the group of raw materials which show an increase of 27 per cent in value and 15 per cent in volume, and lastly to half-manufactured goods which have increased by 31 per cent in value and 13 per cent in volume. It is evident that the decline in the export surplus has been caused mainly by the increase in the imports of foodstuffs and raw materials.

In the following table are shown the variations in certain of the important groups of German imports:—

	Value in Million Rms.			Quantity in Million Dzs.		
	1935	1936	1937	1935	1936	1937
Textile raw materials	698	590	712	8.64	6.85	8.14
Hides and skins	118	140	192	1.44	1.33	1.55
Coffee, cocoa, tea	156	166	209	2.27	2.39	2.60
(Fodder) oil cakes	24	5	11	2.98	0.63	1.09

Compared to the third quarter, Germany's imports from India fell heavily during the last quarter of 1937; so also did her exports to India. For the year as a whole, however, and as compared to 1936, the foreign trade between the two countries has recorded a substantial increase. The imports from India have increased by 26,500,000 Reichsmarks to 168,600,000 Reichsmarks, whereas the exports have risen by the almost identical amount of 26 million marks to 147,600,000 Reichsmarks.

Sweden

1937 as a whole may be said to have been a very good year economically for Sweden. Her foreign trade increased greatly in volume, there was better industrial employment, and satisfactory activity in building and construction, while shipping returns were remarkably good. But it is with regard to prospects for 1938 that Sweden, like the rest of the world, is uneasy. The development in the United States, and the sharp slump in the prices of raw materials in the international markets, are grounds enough for the exercise of caution by Swedish manufacturing concerns. So far, however, there is no contraction in the industrial activity, and if one agrees with Professor Bertil Ohlin "the risk of any intrinsic lowering of the production during the next six to nine months seems rather unlikely, though it is impossible to have any decided opinion about what will follow after that

time.'

As will be seen from Appendix A, India's trade with Sweden during the first eleven months has resulted in an improvement in the balance of trade in favour of India. India's exports to Sweden appear to have increased during 1937, compared to 1936, though it is difficult to say to what exact extent, as Swedish trade figures group India with Ceylon and Burma.

Norway

Norway's total imports increased from 926.9 million kroner in 1936 to 1,285.8 million in 1937, while her exports too increased in about the same proportion from 685.1 to 823.3 million kroner. For the entire year 1937, thus, the import surplus amounts to 462.5 million kroner, which is almost twice the surplus for 1936.

There has been, on the whole, economically a good year for Norway. Freight revenues of shipping increased substantially, resulting in a net income to the country of 400 million as against 240 million in 1936. The entire fleet is believed to have been in use practically throughout the year.

India's trade with Norway for the first ten months of 1937 appears to have resulted in a small improvement in favour of India. Her exports to Norway have risen quite strikingly from 7,191 thousand kroner during January-October, 1936, to 10,361 thousand kroner during the corresponding period in 1937.

Denmark

For Denmark, too, 1937 was, on the whole, a favourable year. Her exports amounted to 1,606 million kroner as compared to 1,380 million in 1936, while her imports rose from 1,486 to 1,697 million. Thus for the entire year there was an import surplus of 91.2 million kroner as against 106.4 million in 1936. This visible adverse balance of trade is more than remedied by the income from shipping alone. Denmark's gross shipping income during 1937 amounted to 285 million, about 70 million above the 1936 income.

As in 1936, this year, too, India's trade with Denmark has resulted in an excess of imports from Denmark. The balance against India has, however, considerably increased, for while Denmark's imports from India at 1,903 thousand kroner show an increase of only 86 thousand kroner, her exports to India have risen by 595 thousand kroner to 4,142 thousand kroner. The visible balance of trade between India and Denmark is thus 2,239 thousand kroner against India and in favour of Denmark.

Switzerland

The Swiss foreign trade for 1937 is in value considerably above the level of 1936. But in view of

the currency devaluation, a comparison in value must be made with reservations. As it happens, however, quantitatively, too, the foreign trade appears to have increased. The imports for 1937 are 10 per cent above those for 1936 in volume, while the exports show the very high increase of 34.4 per cent in weight. In value, the increase as compared to 1936, in imports and in exports, amounts to 42.7 and 45.9 per cent respectively.

(In Million Francs)

	1936	1937
Imports	1,266.3	1,807.2
Exports	881.6	1,286.1
Import surplus	384.7	521.1

The trade between India and Switzerland appears to have followed a course diametrically opposed to that of 1936. The exports to India increased by over 9 million francs, while the imports from India increased by a little less than 7 million with the result that a trade balance of 1,370 thousand in favour of India is turned in 1937 into an adverse balance equal to 1,165 thousand francs, worsening of 2,535 thousand francs in all.

Poland

The expansion of Poland's trade continued unabated throughout 1937. The imports totalled 3,685,506 tons of goods (increase as against 1936 of 616,383 tons), valued at 1,254,341,000 zlotys (that is, an increase of 220,906,000 zlotys over 1936.) The exports also increased in volume by 2,029,528 tons to 14,987,682 tons, and in value, by 166,372,000 zlotys to 1,192,580,003 zlotys. The year's trade has therefore resulted in an adverse balance of 61,761,000 zlotys, whereas in 1936 the balance of trade had been in favour of Poland to the extent of 7,227,070 zlotys. The increase in the value of imports, it will be seen, is greater than the increase in its volume. Thus is so because the bulk of the imports comprised raw materials of which the prices had increased substantially at certain times of the year. On the other hand, as the price of Polish export articles remained practically stationary, the increase in value of the exports is not noticeably disproportionate.

The trade with India continued to be greatly in favour of India, Poland's imports from India during the first eleven months of 1937 amounting to 42,298,000 zlotys as compared to 33,576,000 during the same period in 1936. Poland's exports to India, too, increased slightly from 6,334,000 to 8,188,000 zlotys for the first eleven months in the last year. The balance of trade has thus improved appreciably in favour of India.

Prices

Under the influence of the policy pursued by the Price Commissioner, the wholesale prices in Germany have maintained a rather steady course, which is particularly remarkable in view of the fact that world markets elsewhere have passed through marked fluctuations of prices. The index of German wholesale prices in December stood at 105.5 (basis 1913=100), that is only .5 higher than at the same period during the previous year.

From Appendix C to this report, it will be seen that cotton prices continued to fall during October and November, but recovered very slightly in December. Jute prices were not as fortunate, and the decline in jute prices was not checked but continued even in December. This was also the case in a more or less degree with all the other commodities included in the statement. Groundnuts suffered perhaps the most serious decline in prices of all, for its highest price, which was £ 14 per ton in October, stood at £ 11 16s. 3d. in December, less than 3 shillings more than the highest December price. The fall in the price of linseed oil was also considerable, but appears to have been checked in December. The price of linseed, too, ceased to fall in December, its lowest price in December being a few shillings above the lowest November price.

In Appendix B are set out Germany's imports of a few of the more important commodities exported by India during the years 1935, 1936 and 1937. A cursory examination of that statement shows that, broadly speaking, the quantities of the bulk of the various articles imported by Germany from India have increased, as compared to the corresponding figures for 1936. There are, however, very important exceptions, and were it not for the simultaneous increase in prices of these commodities during the past year, so small is the all round increase in the quantities imported, that it would not have been surprising if the value of the imports from India had shown a fall.

Cotton imports from India during 1937 fell by 19,656 bales to 44,776 bales; with an importation of 8,250 dzs. of Indian and New Zealand hemp from India, a decline of almost 5,000 dzs. is recorded; the imports of decorticated groundnuts, too, at 1,982,419 dzs. have fallen by a little less than 200,000 dzs. although the figure is still well above the 1935 one of 1,263,027 dzs. Other commodities, of which the imports are below the level reached in 1936 are coffee (3,621 dzs. in 1936 and 1,279 dzs. in 1937) raw goat skins (931,489 pieces; 863,884 pieces), prepared goat skins (1,432,214 pieces and 1,149,821 pieces), prepared sheep and lambskins (572,799 pieces and 497,040 pieces), and linseed 200,296 dzs. and 86,823 dzs., respectively).

On the other hand, Germany's imports from India of jute have gone up from 970,097 dzs. in 1936 to 1,090,251 dzs. in 1937, while those of coir yarn have increased by 10,645 dzs. to 95,578 dzs. Tea is another commodity of which Germany has increased her imports from India since 1935, when they amounted to only 9,995 dzs. to 23,548 dzs. in 1937. Imports of a few varieties of hides and skins, too, have improved. Dry cow hides have been imported only in slightly large quantity, but a very marked increase is shown by raw reptile skins of which Germany imported in 1936 only 127,915 pieces, but of which she imported in the past year 405,434 pieces. Another commodity of which the German imports have increased strikingly is manganese ore; from 511,188 dzs. in 1936, its imports have now reached the comparatively high level of 1,213,185 dzs. Another group of articles, under the heading bone manure, shows also a large increase, for their imports which were only 2,663 dzs. in 1936, now amount to very nearly 31,000 dzs. Gumlac, pepper, myrobolams, shellac, niger seed wolfram and mica, are some of the other commodities of which Germany has increased her imports from India.

Other Countries

Other North European countries, too have increased their imports from India both in quantity as well as in value. The imports in particular of certain of the more important Indian products of export, such as cotton and jute have gone up appreciably during 1937. Belgium for instance, has increased her imports of cotton from 392,415 quintals to 491,980 quintals, and of jute from 560,467 quintals to 660,373 quintals. Similarly, Holland's imports of cotton and jute in 1937 amounted to 110,350 quintals and 149,160 quintals, respectively, as against 89,200 and 94,400 respectively, in 1936. Groundnuts too have been imported in substantially large quantity by Holland, the 1937 imports standing at 971,930 quintals as against 442,050 quintals in 1936. Belgian imports of groundnuts, however, show a slight fall of 44,863 quintals, amounting to 255,012 for 1937. Belgium makes up for this as it were by almost doubling her imports of manganese from India; her imports of this are in 1937 aggregating to 166,063 quintals as compared to 87,400 in 1936.

Trade Enquiries

Enquiries from Indian exporters related to all the North European countries, and embraced a variety of Indian commodities. This office was able to put them in touch with the continental importers. The commodities in which interest was shown included steatite, mica, ilmenite, shellac, seedlac, sticklac, pepper, ginger, coir mats and matings and kapok. Enquires from continental importers of Indian commodities showed no signs of diminishing and a few of these received are mentioned here. A Chamber of Commerce in Belgium asked for names and addresses of exporters of gum arabic in India. A firm in Brussels was put in touch with exporters in India of chalmugroo oil. Another firm in Belgium was furnished with the names and addresses of exporters in India of coir fibre. A firm in Danzing was given the names and addresses of exporters of coffee. A Paris firm required the names, addresses of exporters of jute and while a firm in The Hague expressed interest in jute manufactures. A firm in Amsterdam asked for information on material for making carpets and rugs. Enquiries of a similar nature regarding all kinds of other Indian commodities of export came also from Germany, Poland, Switzerland, Czechoslovakia, Denmark, Norway and Sweden.

Enquiries from Indian importers related in the main to machinery of all kinds, but concerned also a number of other articles manufactured in Europe and not competing with Indian goods. In every case, every effort was made to furnish up-to-date information with promptitude.

Besides the trade enquiries, this office received a great number of miscellaneous enquires regarding statistics, customs duties, foreign exchange, import quotas, advertisements, etc.

Several business men called at this office during the quarter under review, bulk of them seemed desirous of purchasing machinery in Europe and were given both the names and addresses of the manufacturers of the machinery required and also suitable trade introductions. It may also be mentioned that apart from enquires confined to business, this office is also sometimes—as happened during this quarter—asked for assistance in matters of quite individual interest; whenever possible, help and advice is given in such cases too.

Foreign Sea-Borne Trade of British India in the Calendar Year 1937

As a result of the separation of Burma, statistics of the foreign sea-borne trade of British India include, with effect from 1st April, 1937, the trade of British India with Burma and exclude the direct trade of Burma with other foreign countries. The figures for 1937 in this compilation, which have been arrived at by adding three months' figures for January to March, 1937, on the pre-separation basis with 9 months' figures for April to December, 1937, on the post-separation basis, are not strictly comparable with those of the preceding years. The figures given in the following paragraphs should, therefore, be studied with reference to the limitations explained above.

The grand total of the imports, exports and re-exports of private merchandise during the calendar year 1937 amounted to Rs. 375 crores. In 1936 it amounted to Rs. 310 crores as compared with Rs. 297 crores in the preceding year 1935. The value of the imports of private merchandise amounted to Rs. 165 crores, exports of Indian merchandise Rs. 202 crores and re-exports of foreign merchandise Rs. 8 crores during the calendar year 1937.

Imports of treasure on private and Government account amounted to Rs. 9 crores while exports thereof reached Rs. 20 crores. The value of the imports of gold in 1937 amounted to Rs. 1,92 lakhs, that of silver Rs. 6,90 lakhs and currency notes Rs. 2 lakhs. Exports of gold were valued at Rs. 18,28 lakhs, those of silver Rs. 1,10 lakhs and currency notes Rs. 27 lakhs, during the same period.

The values of the total trade in merchandise and treasure on private account for each year from 1913 to 1937 are shown in the table below :—

	Merchandise.	*Treasure.	Total.		Merchandise.	*Treasure.	Total.
	Rs. (crores).	Rs. (crores).	Rs. (crores).		Rs. (crores).	Rs. (crores).	Rs. (crores.)
1913	426	48	474	1925	633	86	719
1914	369	31	400	1926	563	48	611
1915	307	23	330	1927	573	38	611
1916	378	17	395	1928	586	42	628
1917	388	35	423	1929	578	31	609
1918	418	4	422	1930	442	31	473
1919	492	12	504	1931	306	52	358
1920	615	34	649	1932	272	80	352
1921	505	61	566	1933	263	54	317
1922	536	52	588	1934	278	68	346
1923	568	68	636	1935	297	52	349
1924	626	74	700	1936	310	49	359
				1937	375	28	403

* Includes currency notes from April, 1922.

Trade by Provinces.—The total imports and exports, including re-exports of private merchandise, of each maritime province during the year 1936 and 1937, are shown in the following table :—

	Imports		Exports Including re-exports	
	1936.	1937.	1936.	1937.
	Rs. (lakhs).	Rs. (lakhs).	Rs. (lakhs).	Rs. (lakhs).
Bengal	36.67	47.51	71.95	88.52
Orissa	1	1	..	..
Bombay	47.88	69.23	39.58	45.18
Sind	13.98	19.57	21.76	29.60
Madras	15.22	25.48	32.64	39.65
Burma	10.82	2.96*	19.32	7.32*
TOTAL	124.58	164.76	185.25	210.27

* Figures for three months. January to March, 1937.

EXPORTER & IMPORTER

April 1938

Imports during each month.—The imports of private merchandise during each month of the years, 1936 and 1937, are shown below :—

	1936	1937
	Rs. (000).	Rs. (000).
January	13,06,39	12,58,74
February	10,49,44	9,35,75
March	10,85,10	13,12,37
April	10,11,88	15,70,72
May	10,05,11	14,36,61
June	9,79,62	13,88,08
July	10,08,72	14,11,96
August	9,29,20	13,29,99
September	9,55,41	13,60,76
October	10,67,49	14,51,93
November	10,61,63	15,79,78
December	9,98,08	14,33,46
Total	124,58,07	164,76,15

Imports by classes.—Imports of food, drink and tobacco amounted to Rs. 19,54 lakhs, raw materials to Rs. 35,21 lakhs and manufactured articles to Rs. 107,53 lakhs. Imports of living animals amounted to Rs. 33 lakhs and postal articles and baggages, not specified, to Rs. 2,15 lakhs.

The following table shows the comparative importance of the principal commodities imported into British India during the calendar years 1936 and 1937 :—

	1936	1937
	Rs.	Rs.
Cotton, raw	47172699	100842227
Cotton, twist and yarn	30544246	24292562
Cotton, piecegoods, grey	37058634	20023122
" " white	45457364	44533116
" " coloured, etc.	58757319	54620841
Wool manufactures	23082456	32335529
Artificial silk	34859536	52704671
Iron or steel manufactures	55235208	68970707
Coal tar dyes	25866254	36629317
Textile machinery	30241016	36103866
Electrical instruments	30258458	38961779
Chemicals	26376664	33955593
Hardware	30374683	34001328
Paper	24887363	35009408
Motor cars	28013920	30046105



April 1938

EXPORTER & IMPORTER

Exports during each month :—The exports and re-exports of private merchandise, month by month, are shown in the following table :—

	Exports of Indian Merchandise		Exports of Foreign Merchandise (Re-exports).	
	1936	1937	1936	1937
	Rs. (000)	Rs. (000)	Rs. (000)	Rs. (000)
January	139646	206522	3717	14166
February	151182	185302	2959	5190
March	159989	215323	3623	5781
April	149929	167560	3405	8054
May	142105	161031	2925	5371
June	132257	170537	2591	8110
July	141428	168885	3162	4945
August	139069	148150	3162	4531
September	146415	165166	5457	5887
October	161157	162967	4967	9338
November	168299	146944	6209	3970
December	173440	132653	5392	6362
Total	1804916	2021040	47569	81705

Exports by classes.—Exports of food, drink and tobacco amounted to Rs. 43,36 lakhs, raw materials to Rs. 98,92 lakhs and manufactured articles to Rs. 56,25 lakhs. Exports of living animals amounted to Rs. 8 lakhs and postal articles to Rs. 3,48 lakhs.

The following table shows the comparative importance of the principal commodities exported from British India during the calendar years 1936 and 1937 :—

	1936	1937
	Rs.	Rs.
Cotton, raw	405965371	395620050
Cotton piecegoods	22589479	57099312
Jute, raw	137860216	162331449
Jute gunny bags	116882332	129964251
Jute gunny cloth	144050809	161085770
Wool, raw	23005070	32943019
Tea	204228315	238457836
Groundnuts	95439886	107946494
Linseed	44697311	35277628
Wheat	17380605	45824163
Goat skins, raw	25661381	35539777
Cow hides, tanned	23554866	28458122
Oilcakes	19910824	23777558
Lac	19398307	21020956

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Balance of Trade.—India's visible balance of trade in merchandise and treasure during the calendar year 1937 and the preceding two years is shown in the following table. The figures are arrived at by combining the balances of transactions in (i) private merchandise and (ii) treasure (private account). The balance of remittances of funds is also shown with details at the end of this table. In these balances the sign *plus* (+) indicates net export and *minus* (—) net import.

	1935	1936	1937
	Rs. (lakhs)	Rs. (lakhs)	Rs. (lakhs)
Exports of Indian merchandise (private)	+156.91	+180.49	+202.10
Re-exports of foreign merchandise (private)	+3.81	+47.6	+81.7
Imports of foreign merchandise (private)	-135.27(a)	-123.89(a)	-164.38(a)
BALANCE OF TRADE IN MERCHANDISE (private)	+25.45	+104.20	+119.42
Gold (private)*	+43.23	31.96	+16.36
Silver (private)*	+3.03	-13.20	-6.31
Currency notes (private)	+35	+24	+24
BALANCE OF TRANSACTIONS IN TREASURE (private)	+46.61	+19.00	+10.29
TOTAL VISIBLE BALANCE OF TRADE	+7206	+80.36	+56.18
Purchases of sterling by the Reserve Bank of India	-48.88	-56.53	-43.11
Sales of sterling by the Reserve Bank of India	..	-	-
Transfers of Government securities	-65	-8	-15
Interest drafts on India in respect of Government of India securities	-31	-29	-29
BALANCE OF REMITTANCES OF FUNDS	-49.84	-56.90	-43.55

* These exclude transactions which do not enter into the balance of trade.
(a) Exclusive of the value of railway materials (Rs. 66 lakhs and Rs. 69 lakhs, and Rs. 38 lakhs, in 1935, 1936 and 1937, respectively) imported direct by State Railways working under Company management which was not paid for in the ordinary way and not, therefore, taken into account in arriving at the balance of trade.

India's Foreign Trade in January 1938

India's trade for the month reveals a further setback in so far as the exports are concerned, resulting again in an adverse trade balance. The value of exports in January was only Rs. 13.65 crores as against Rs. 20.65 crores for the corresponding period last year; in other words a fall of over 30%. This drop is mainly due to the decrease in offtake by the following countries:—

Japan	...	-3.6 crores
United Kingdom	...	-1.9 "
Germany	...	-0.8 "

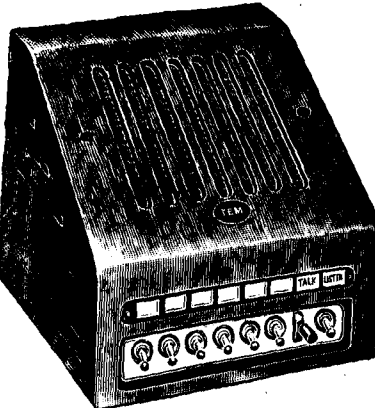
India's trade balance with some principal foreign countries for the ten months from 1st April last is given below:—

	Exports from India Crores	Imports to India Crores	Trade Balance Crores		Exports from India Crores	Imports to India Crores	Trade Balance Crores
	Rs.	Rs.	Rs.		Rs.	Rs.	Rs.
United Kingdom	... 51.9	43.4	+ 8.5	Germany	... 6.8	13.0	- 6.2
Burma	... 8.4	21.3	-12.9	Belgium	... 4.5	2.8	+ 1.7
Japan	... 15.3	19.6	- 4.3	Italy	... 4.2	2.3	+ 1.9
U.S.A.	... 16.6	10.3	+ 6.3				

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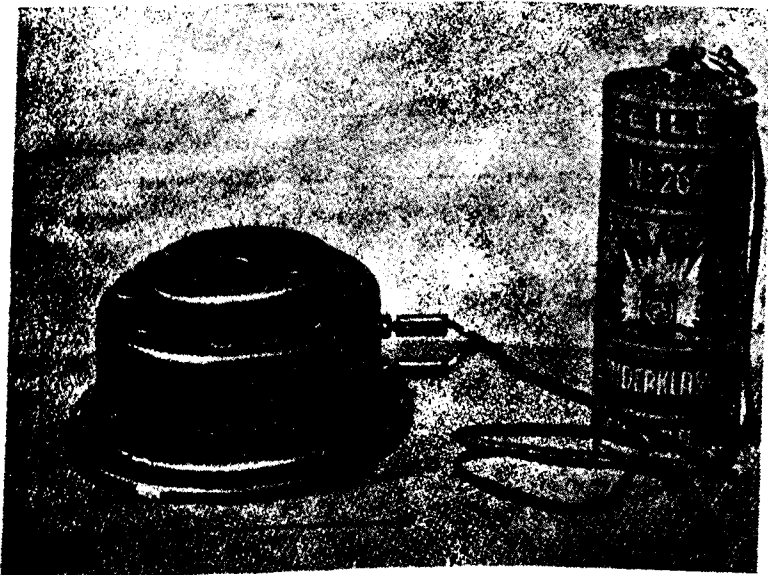


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The equipment is complete in performance yet economical in cost so that firms both large and small can afford to buy it. Installation is extremely simple and can be easily made by any competent electrician or wiring man. TEM equipment is designed and built to the requirements of particular markets and is backed by extensive technical and merchandising co-operation.

A Novel Rotating Table for Shop Windows and Exhibition Rooms



Something that attracts the public's attention is always welcome for shop windows and show rooms. The goods will be particularly noticeable when they are shown moving, and can thus be seen from all sides. Among the various movement mechanisms on the market for advertising in the show window and show room, the new low-tension-current rotating table deserves special attention. It can easily be erected everywhere without any assembling. A cell serves as a source of power. By inserting the battery terminals the other way round, the apparatus turns to the right or left. This table also rotates when suspended on the wall or from the ceiling. It is arranged

for loads with adjusted position up to 220 lb. The table is manufactured



and sold under the name of "Dreti" by the Motorenge. Friedrich & Co., Berlin.



The following trade enquiries have been received by the Director-General of Commercial Intelligence and Statistics, 1, Council House Street, Calcutta, who will welcome replies to be addressed to him direct by any individual or firm interested. Firms replying to these inquiries should furnish their bank references with their replies. Replies to enquiries for more than one commodity should specify in which of them the respondent is interested.

Babul Bark

(AA-138) A firm in Anand (Bombay) enquires for purchasers of Babul Bark in India.

Cotton Yarn Waste

(AA-139) A correspondent in Dacca (Bengal) enquires for purchasers of Cotton Yarn Waste in India.

Imitation Jewellery

(AA-140) A correspondent in West Godavery District (South India) desires to get into touch with manufacturers of Imitation Jewellery in India with a view to taking up an agency.

Horn Dust

(AA-144) A firm in Dacca (Bengal) enquires for purchasers in India of Horn Dust, i.e., rejections of horns from the button factories.

Tin Foils

(AA-145) A correspondent in Calcutta desires to be put in touch with suppliers in India of Tin Foils.

Coarse Wool, Lambs Wool, Goat Hair and Cow-tail Hair

(AA-146) A local firm enquires for suppliers of Coarse Wool, Lambs Wool, Goat Hair and Cow-tail Hair in India.

FOREIGN—

Bamboo Roots for Polo Balls

(AA-147) A firm in London (United Kingdom) desires to be put in touch with exporters in India of Bamboo Roots required for the manufacture of Polo Balls.

Raw Uncured and Cured Head Mounted leopard, Tiger and Lion Skins

(AA-148) A firm in Madras desires to be put in touch with buyers of Raw Uncured and Cured Head Mounted Leopard, Tiger and Lion Skins in India.

Woollen Yarns

(AA-149) A firm in Lahore (Punjab) enquires for purchasers in India of handspun Woollen Yarns used for carpet making.

The following trade enquiries have been received by the Secretary of the Indian Merchants' Chamber, Bombay. When asking for further particulars Correspondents are requested to quote reference numbers. They should clearly understand that the Chamber can take no responsibility whatever as to the financial standing or bona fides of the firm making these enquiries.

Reference No.	Subject of Enquiry.	Place.
13	Printing Works undertaking printing of cloth	Bombay
14	Wool Merchants	Beawar
15	Importers of Charcoal	Tuticorin
16	Importers of Corks	France
17	Importers of dry fruits and Conserves from Syria	Bombay
18	Representatives for the sale of relaying rails and rails for building purposes	Netherlands
19	Dealers in (1) Halwas and (2) dried salted fish	Madras
20	Exporters of Coffee	Oslo (Norway).
21	Importers of Rubber, Tin, Copra etc. and exporters of Piecegoods	Penang

The following trade enquiries have been published in the "Indo-Czechoslovak Trade Journal." When applying for agencies, kindly state lines in which you are interested, the territory for which the agency is wanted and bank references.

1—Wooden Goods

1. Wooden toys
2. Embroidery hoops and frames

II—Textile Goods

3. Neck Ties
4. Cotton handkerchiefs
5. Cotton ready-made shirts and collars
6. Sewing threads for shoe manufacturing
7. Typewriter ribbon cloth

III—Footwear, hats, etc

8. Felt, hoods, hats
9. Stockings

IV—Wares of stone, glass and ceramic products

10. Crystal glass and presentation articles
11. Glass pearls
12. Glass buttons
13. Imitation horn buttons
14. Wood and leather fancy buttons
15. Porcelain articles for high and low tension fixtures
16. Porcelain for ceiling and wall-lighting fixtures
17. Porcelain bath room fittings
18. Porcelain textile accessories

V—Machinery and Electrical goods

19. Diesel engines
20. Textile accessories
21. Agricultural machines, ploughs, etc.
22. All kinds of water pumps
23. Bolt threading machines
24. Textile cutting machines, Eccentric presses
25. Electric motors for looms
26. Flour mills machinery
27. Machinery for making mats

VI—Ammunition, etc.

28. Safety fuses

VII—Miscellaneous

29. Fibre suitcases
30. Imitation flowers

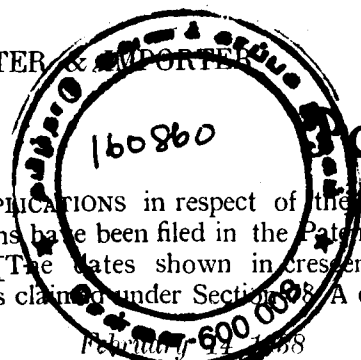
31. Cigarette paper
32. Syringes
33. Printing paper
34. Airmail paper
35. Rubber gloves (surgical)
36. Illuminating radio colours
37. Rubber hygienic articles
38. Shaving blades
39. Spectacle frames and sunshade glass for spectacles
40. Advertising tapes and packing threads
41. Spectacle lenses
42. Advertising novelties

The following trade enquiries have been received by the Southern India Chamber of Commerce, Madras.

Ref. No.	Enquirer from	Desires to buy	Desires to sell
24	Singapore	Cotton Drills, Poplins and Aluminium wares.	
25	Osaka	...	Carborundum grains (Silicon Carbide) for Abrasive purposes.
26	Nagoya	...	Porcelains.
27	London	...	Office Appliances.
28	Aden	...	Dried Fish.

ANNOUNCEMENT

Due to misunderstanding of our instructions by the printers, pages 5 to 16 of this issue have been printed on Mechanical Glaze paper instead of on Art paper that we have been using so far. We regret the error.



Patent Office Notices

APPLICATIONS in respect of the following new inventions have been filed in the Patent Office, Calcutta. [The dates shown in crescent brackets are the dates claimed under Section 13A of the Act.]

24928. C. F. K. Watson.—The separation of settleable matter from a stream of fluid.
24929. L. Motley.—Improvements in or relating to gun mountings particularly for machine guns and automatic rifles. (February 26, 1937.)
24930. May & Baker Ltd.—Process for the preparation of new compounds of therapeutic value. (March 19, 1937.) [Addition to No 23216.]
24931. S. E. Lofts.—Improvements in or relating to closures for cans, jars or like containers.
24932. Fomento Agricola, Mercantil E. Industrial, Limitada.—Method of manufacturing a material for coating, wrapping, and the like.
24933. A. Boenecke.—Improvements relating to the manufacture of the lids or covers of boxes, bottles or other containers.
24934. The British Tabulating Machine Co. Ltd.—Improvements in or relating to machines for manufacturing record cards.
24935. Marconi's Wireless Telegraph Co. Ltd.—Improvements in or relating to operating circuits for voltage responsive visual indicator electron discharge tubes.
24936. Marconi's Wireless Telegraph Co. Ltd.—Improvements in or relating to phase and frequency modulating circuit arrangements.
24937. B. Kalinowski.—Improvements in or relating to floaton processes.
24938. J. Baldasar.—Improvements in the manufacture of carpet and like pile fabrics.
24939. K. Singh.—Wooden-cart of a new kind.
24940. Bulaki Das.—An improved refuse collecting bin.
24941. M. T. Ahmad.—Improvements in or relating to tube well strainers. (Divisional Date July 19, 1937.)
24942. C. S. Sarver.—Improvements in or relating to means for converting reciprocating into rotary motion.
- February 15, 1938
24943. A. P. Roy and E. E. Marklew.—Improved rail joint. [Addition to No. 19449.]
24944. Aktiebolaget Svenska Flaktfabriken.—Reversible screw propeller for fans.
24945. R. Pintus.—Improvements in or relating to waistbands for trousers.

24946. S. Colla, and M. Herlitzka.—Process for stimulating the formation roots and acting upon secondary meristems.
24947. The General Electric Co. Ltd.—Improvements in electric discharge lamps (February 16, 1937.)
24948. Stewarts and Lloyds Ltd.—Improvements relating to the rolls of reducing mills and like apparatus. (February 16, 1937.)
24949. R. Marcus, and R. N. Scott.—Improvements in and relating to apparatus for use in well boring or drilling operations.
24950. D. J. Dalgarno.—Improvements in and relating to receptacles for cigar and cigarette ends and ash.
24951. Fichtel & Sachs Aktiengesellschaft.—Free-wheel hub with a back-peddalling brake driven by a motor mounted in the driving wheel.
- February 16.
24252. H. Brammer.—Improvements in or relating to driving belts. (February 17, 1937.)
24953. R. N. Scott and R. Marcus.—Improvements in and relating to the tripping and setting of tools in well bore casings or analogous localities.
24954. A. L. Mc. William, E. L. Goodman and McLeod & Co. Ltd.—Improvements in or relating to the driving mechanism of tea leaf rolling machines.
24955. B. V. Advani.—Improvements in or relating to bricks, blocks, tiles or the like and to roofs or floors formed therewith.
24956. Lampen-Und Metallwarenfabriken R. Ditmar Gebruder Brunner A. G.—Incandescent lamp.
24957. Do.
- February 17
24958. H. H. Bakhsh.—Improved band saw machine.
24959. Howard and Bullough, Ltd., and A. G. Pilling.—Improvements relating to under-clearers and their mounting in textile spinning, doubling, twisting and like machines. (February 18, 1937.)
24960. C. Jajodia.—Improvements in or relating to bobbins for spinning, roving and the like machines.
20961. Schering. Aktiengesellschaft.—Process for the manufacture of isomer dihydrofolic hormones, analogues of the same containing less hydrogen, and their derivatives.

CABLE "TRUMP"

P. B. No. 1204

MINE OWNERS' SYNDICATE

SECOND LINE BEACH, MADRAS
EXPORT DEPARTMENT
FOR
INDIAN MINE OWNERS

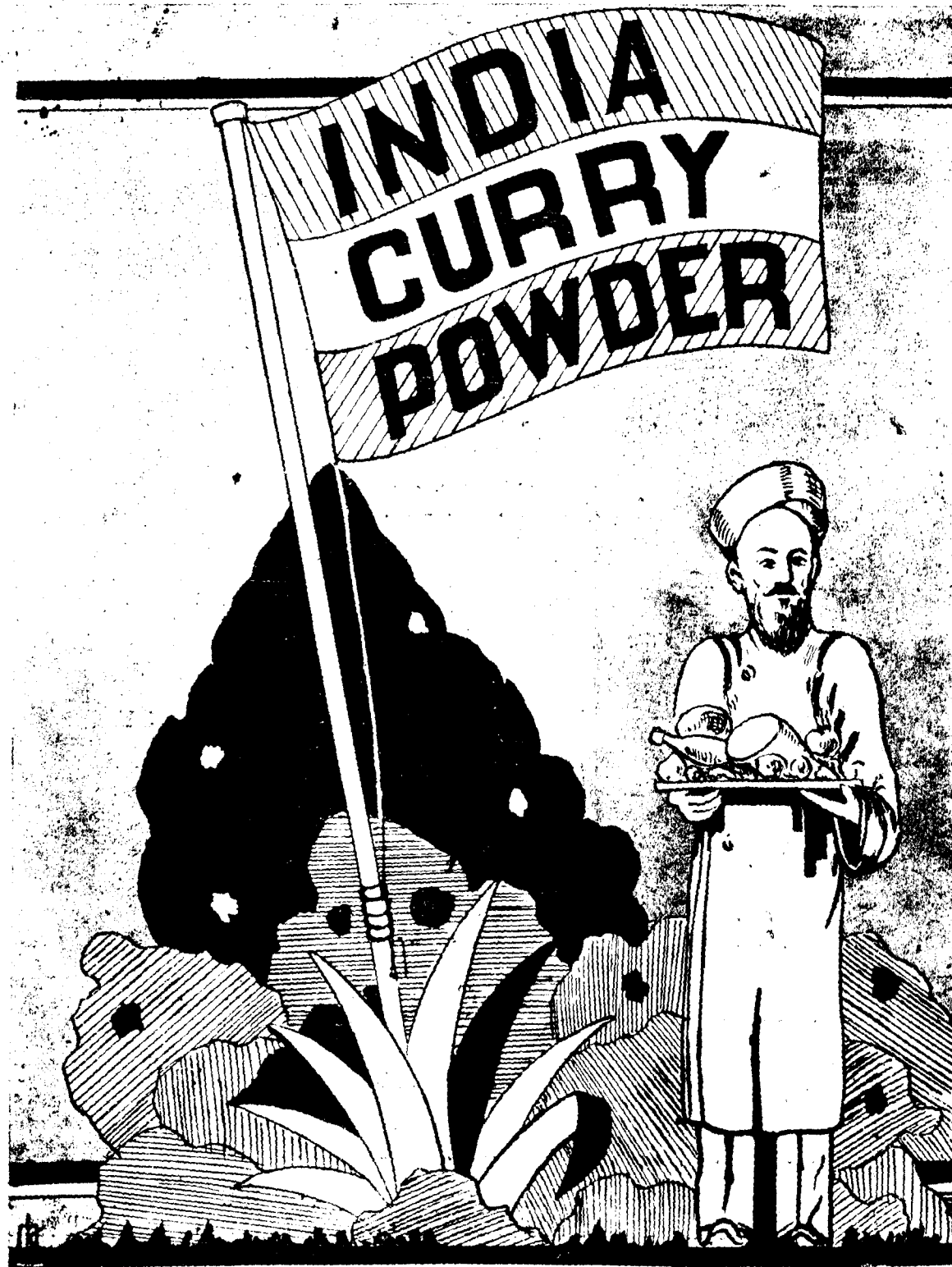
WE EXPORT:—

- | | |
|---------------|--------------------|
| 1. Manganese | 10. Graphite |
| 2. Asbestos | 11. Gypsum |
| 3. Mica | 12. Ribband Jasper |
| 4. Beryl | 13. Flint |
| 5. Kyanite | 14. Agate |
| 6. Haemetite | 15. Fluor Spar |
| 7. Samarskite | 16. Soap stones |
| 8. Talc | 17. Monosite sands |
| 9. Corundum | 18. Ilminite |

Cable Enquiries From All Parts of the World Invited

On payment of small charges we undertake to supervise mineral shipment from any part of India. We have our representatives and offices at all harbour points.

Regd. No. M. 3790.



Write for prices, samples and agencies to:

Cables "TRUMP."

INDIA CONDIMENTS COMPANY

Sole Exporters: CHETTIAR & CO.

20, Second Line Beach, Madras

[illegible]