

REPORT

ON THE

MARITIME TRADE AND CUSTOMS ADMINISTRATION OF BURMA

FOR THE OFFICIAL YEAR

1912-13

BY

A. S. JUDGE

CHIEF COLLECTOR OF CUSTOMS, BURMA



RANGOON

OFFICE OF THE SUPERINTENDENT, GOVERNMENT PRINTING, BURMA
1913

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SECTION B-ADMINISTRATION.

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MARITIME TRADE AND CUSTOMS ADMINISTRATION OF BURMA

April 1st 1912 to March 31st 1913.

I. General Summary.—The following statement shows the aggregate sea-borne trade of the whole province of Burma with foreign ports, with Indian ports and between Provincial Ports :—

		Average for the five years ending 1908-09.	1909-10.	1910-11.	1911-12.	1912-13.	Increase or decrease in 1912-13 as compared with 1911-12.	
							More.	Less.
		Rs.	Rs.	Rs.	Rs.	Rs.	Rs.	Rs.
I.—Trade with Foreign Ports.								
IMPORTS, PRIVATE—Merchandise	...	10,14,80,448	10,87,92,303	10,75,18,143	11,68,29,885	13,87,10,832	2,18,80,487	...
EXPORTS, PRIVATE	{ Foreign merchandise	5,13,137	5,54,561	6,80,471	6,04,483	8,26,875	2,22,392	...
	{ Indian merchandise	15,49,90,706	16,01,00,001	20,77,54,416	25,34,25,136	28,64,63,079	3,30,12,943	...
	Total, Exports	15,55,93,843	16,06,54,565	20,84,04,887	31,40,19,619	28,72,94,951	3,32,65,335	...
	Total Trade, Private Merchandise	25,63,86,291	26,94,46,868	31,59,38,030	37,08,59,504	42,60,05,782	5,61,45,772	...
GOVERNMENT STORES.	{ Imports	16,08,682	10,81,901	4,78,773	9,87,934	11,28,156	1,35,202	...
	{ Exports	8,514	1,379	1,492	5,670	16,235	9,665	...
TREASURE *	{ Imports	14,98,187	14,48,975	17,85,411	55,78,840	65,98,303	10,19,472	...
	{ Exports	2,72,731	1,32,800	2,87,837	2,79,930	33,475	...	2,46,505
	Total Trade with Foreign Ports	26,03,72,905	27,31,19,013	31,81,66,548	37,77,11,998	43,87,75,504	5,60,63,506	...
II.—Trade with Indian Ports (outside Burma).								
IMPORTS, PRIVATE	{ Indian merchandise	6,64,07,185	6,62,40,235	7,38,07,965	7,52,20,838	9,05,18,027	1,52,97,189	...
	{ Foreign merchandise	51,38,276	52,26,171	68,61,362	51,95,130	60,80,256	8,85,126	...
	Total, Imports	7,16,65,411	7,14,66,406	7,89,69,347	8,04,15,968	9,65,98,283	1,61,82,315	...
EXPORTS, PRIVATE	{ Indian merchandise	11,16,03,176	15,34,68,002	11,68,75,316	8,21,14,303	9,61,81,240	1,40,16,927	...
	{ Foreign merchandise	17,41,047	17,62,553	19,32,281	19,21,226	17,77,414	...	1,43,822
	Total, Exports	11,32,47,723	15,52,10,555	11,78,08,597	8,40,35,529	9,79,08,654	1,38,73,105	...
	Total Trade, Private merchandise	18,48,58,181	22,66,76,961	19,67,77,944	16,44,51,507	19,45,06,927	3,00,55,420	...
GOVERNMENT STORES.	{ Imports	...	80,69,175	27,63,134	27,30,023	40,19,297	12,58,374	...
	{ Exports	...	5,74,032	6,10,206	7,71,991	7,21,712	...	50,279
TREASURE *	{ Imports	8,80,53,415	1,19,56,156	6,83,73,156	4,01,92,561	4,96,05,600	91,12,939	...
	{ Exports	99,91,151	11,97,530	9,44,307	1,90,40,027	1,90,40,277	1,27,39,220	...
	Total Trade with Indian Ports	...	24,34,53,894	20,76,24,296	21,47,38,139	26,78,98,713	5,31,65,674	...
III.—Trade between Provincial Ports.								
PRIVATE	{ Indian merchandise	1,54,33,805	1,55,49,670	1,72,82,794	2,38,20,956	2,39,29,757	11,08,801	...
	{ Foreign merchandise	1,56,74,507	1,56,67,221	1,62,14,293	1,75,21,525	2,01,08,879	25,86,864	...
	Total Trade, Private Merchandise	3,11,07,812	3,12,06,891	3,34,97,087	4,03,42,481	4,40,38,136	36,95,655	...
GOVERNMENT STORES	...	...	10,22,031	9,62,619	8,03,894	8,88,068	94,199	...
TREASURE *	...	1,30,47,141	31,05,489	1,63,98,291	1,03,13,426	1,26,62,404	23,44,098	...
	Total Trade between Provincial Ports	...	3,58,34,411	5,13,58,027	5,14,04,801	5,75,98,693	61,33,892	...
	GRAND TOTAL, PRIVATE MERCHANDISE	47,29,47,237	52,73,30,720	54,82,08,051	57,56,53,492	66,45,53,339	8,88,96,847	...
	AGGREGATE, INCLUDING TREASURE AND GOVERNMENT STORES.	54,12,97,587	55,09,08,258	57,71,68,871	64,39,14,838	75,92,67,910	11,53,53,072	...

† The actual value of goods carried between Provincial ports is about half that shown here since these figures cover both export and import of the same goods.
‡ Corrected total since issue of last report.

The year under review has broken records in every direction. The total value of the sea-borne trade of the Province exceeded that of the preceding year, which itself established a record, by 11½ crores or nearly 18 per cent. Leaving treasure and Government stores out of account, the value of private merchandise imported and exported exceeded that of the year before, the previous best, by 8,88·9 lakhs or 15·4 per cent.

The advance was equally marked in exports and in imports. Rice accounts for more than half of Burma's export trade, and since it is largely a matter of accident in what proportions the supplies of this commodity are divided between Indian and Foreign ports, it is sounder to consider the external trade of Burma as a whole, omitting only the purely coasting trade between ports within the province. On this basis, the total exports of merchandise from Burma amounted to 38·5 crores in value, which is the highest figure yet reached, showing an improvement of 14 per cent. on the figures of the previous year, 1911-12, and on the figures of 1907-08 of 21 per cent. A part of this improvement in total value is accounted for by the high prices prevailing

during the year, since the average value of milled rice exported was higher than in the previous year by 5 per cent. and than in 1907-08 by 11 per cent. ; and this must be taken into consideration in making the comparison a quantitative one. It is interesting to notice that though in ten years since 1902-03 the value of milled rice exported had advanced by $9\frac{1}{2}$ crores, yet in the year just closed this item only accounted for about 62 per cent. of the total exports as against 72 per cent. in the earlier year. This extension of trade in other articles than the staple is an earnest of the general development that may be hoped for if success attends the proposals lately discussed for improving the communications of the province ; yet to say that the rice trade will be the first to benefit from improved communications is as true today as it was forty years ago, when the Chief Commissioner of British Burma said in his Annual Report on Trade and Customs : " It is impossible to resist the observation that if the rice trade has increased, as it has done, with so little expenditure on the improvement of the country, it is easy to imagine what might not have been its progress under a larger expenditure. It is difficult in the face of the figures contained in this report to understand how there can be a moment's hesitation as to the construction of a railway through the province."

Apart from rice and bran, there have been very striking increases in the exports of petroleum products, timber, groundnuts, raw cotton and tobacco leaf : while there has been a set-back in the exports of lead, of beans and of cutch. These and other minor variations will be discussed later in this report.

Turning to imports, we find that there has been an advance of over 19 per cent. in the combined external trade (19 per cent. in foreign imports and 20 per cent. in imports from India). Here again, however, we must begin by making allowance for the general rise in prices throughout the world. The British Board of Trade index number of wholesale prices was 5·2 per cent. higher in 1912 than in 1911, while M. Sauerbeck's analysis of the prices of 45 commodities gave an average index number higher by $6\frac{1}{4}$ per cent. in 1912 than in 1911. More light will be thrown on this by a reference to the table of Price Levels in paragraph 5. But the elimination of this factor still leaves a very important increase in imports to be accounted for. Improved purchasing power resulted of course from the realisation of high prices for goods exported ; but though consumption probably kept pace with importation in some lines (as, for example, provisions, hardware and building materials), there was a serious overstocking of cotton and silk piece-goods. At the close of the financial year stocks were heavy and demand poor, and there was considerable ground for anxiety lest a further depression of paddy prices or a lowering of rates in Manchester should precipitate a crisis. Even if the bad time is tided over without disaster imports of piece-goods in the current year (1913-14) will almost certainly be restricted ; and we may anticipate a check to the recent growth in the number of bazaar dealers who indent direct on Europe instead of dealing with the large importing houses here. That this tendency has been becoming marked of late is shown by the fact that in a period taken at random in 1912 two and a half times as many Indian names occur among importers of European and Japanese goods as in the corresponding period of 1907.

The largest increases over the figures of the previous year occurred in the imports of cotton and silk manufactures, of liquors, sugar, biscuits and milk, of hardware, paper, soap and matches. The construction of new railway lines accounts for an increase in the imports of railway plant. There have been noticeable declines in the imports of machinery and of salt. Imports of cotton twist and yarn from India show a remarkable advance, while Burma's own excellent crops resulted in a conspicuous decline in importations of tobacco, groundnuts and sesamum from other parts of India.

Direct communication with Japan, which became available towards the end of 1911, has been maintained throughout the year by the Nippon Yusen Kaisha, and the opposition of British owners has led to something in the nature of a freight war. It might have been expected that these circumstances would lead to a considerable increase in imports of Japanese goods into Burma ; but if we set aside silk goods and matches, which have long been Japan's specialities, and coal, we find that the trade has remained stationary. It is satisfactory to note that no growing demand has arisen for the cheap and inferior reproductions of Western lines in small wares and perfumery which Japan offers to the world. Exports to Japan on the other hand increased by 65 per cent. mainly owing to the heavy business done in rice, and their value was more than three times that of the imports from that country.

2. Balance of Trade : Movements of Treasure.—The balance of trade in the combined external trade of Burma, that is to say, the excess in value of exports over imports, amounted in the year under review to 15 crores. (It should be remembered that import values include freight, etc., but export values do not include this, and hence, from one point of view the excess is even greater. This is the highest difference yet recorded, though Burma has for many years had a balance the same side. A fairer figure is obtained by subtracting from the total excess the amount which imports of treasure exceeded exports of treasure. This leaves, for 1912-13, a net balance of over 11 crores. The net balance has been higher in two years during the last decade but in most other years considerably less. Probably more than a crore of this amount is accounted for by the removal of actual silver coin by harvest labourers returning to Madras or Bengal and taking their savings with them : the numbers of deck passengers from and to places in these presidencies during the year were 211,383 and 191,399, respectively. Part of the remaining eleven crores went no doubt to the formation of temporary credits abroad : and the rest is divided

between the provincial contribution to Imperial expenses and the profits due to foreign and Indian capital that has exploited the trade of Burma.

The preceding year's phenomenal imports of *gold* (Rs. 268·11 lakhs net, after deducting re-exports) have not been repeated, and net imports were again near the level which, with the exception of the previous year, has been normal during the past decade ; the actual figure being 66·16 lakhs. In the year 1911-12, the imports of gold included 1,663,790 sovereigns (Rs. 250 lakhs) : and from the relapse in 1912-13 it would seem that this amount had not been absorbed into general currency, though efforts are steadily being made to popularise gold and currency notes as a substitute for silver. The imports of sovereigns in 1912-13 came to £275,856, mostly imported by bankers from foreign countries. While imports of gold declined, imports of silver were very high, the excess of imports over exports being Rs. 305·13 lakhs, a figure which was surpassed in 1907-08 but which has not been approached within a crore in any other year. The following table gives the imports and exports of gold and silver, whether consigned privately or by Government in the periods shown :—

		Average for the five years ending 1908-09.	1909-10.	1910-11.	1911-12.	1912-13.
TREASURE.		Rs.	Rs.	Rs.	Rs.	Rs.
I.—To or from Foreign Ports.						
Gold—Imports, Private	...	14,84,347	11,33,696	17,83,785	55,40,731	65,97,503
Silver—Imports, Private	...	69,340	13,279	1,688	38,159	860
Gold—Exports, Private	...	1,92,458	55,800	51,000	1,35,630	3,600
Silver—Exports, Private	...	80,273	77,000	2,36,837	1,14,350	29,875
Gold and Silver (Government)—nil.		...	...	...	...	...
II.—To or from Indian Ports (outside Burma).						
GOLD—IMPORTS	{ Private ... Government ...	21,701 66,30,000	NIL. 10,00,000	88,800 30,00,000	1,13,541 2,13,40,000	37,500 NIL.
Total		68,51,701	60,00,000	30,88,800	2,14,53,541	37,500
SILVER—IMPORTS	{ Private ... Government ...	69,83,701 2,41,13,600	51,86,136 7,50,000	24,44,825 1,50,000	13,94,020 1,76,85,000	16,53,000 4,79,16,000
Total		3,14,01,701	59,36,136	34,41,825	1,90,79,520	4,95,68,000
GOLD—EXPORTS	{ Private ... Government ...	9 NIL.	NIL. NIL.	33,750 7,515	NIL. 7,500	NIL. 15,000
Total		9	NIL.	41,265	7,500	15,000
SILVER—EXPORTS	{ Private ... Government ...	78,198 99,02,911	1,06,000 10,11,530	1,06,856 7,97,186	89,646 62,64,911	7,63,500 1,82,61,777
Total		99,81,142	11,97,530	9,03,042	62,93,557	1,90,26,277
III.—Between Provincial Ports.						
GOLD	{ Private ... Government ...	89,300 4,63,235	500 12,000	500 8,58,450	1,050 6,02,820	6,000 21,00,900
Total		5,02,535	12,500	8,58,950	6,03,870	21,06,900
SILVER	{ Private ... Government ...	53,33,032 67,06,547	21,95,145 8,97,844	17,85,221 1,42,54,120	7,81,460 89,83,096	28,51,560 77,04,004
Total		1,15,41,609	30,92,989	1,60,39,341	97,14,556	1,05,55,564

NOTE.—Imports of Silver overland from Western China exceeded exports to that region by nearly 31 lakhs against 9 lakhs in 1911-12. This is attributed to revival of trade after the Revolution.

3. Division of Trade between the Ports.—The following table shows in what percentages the total trade in *private merchandise* was shared between the different ports in the Province.

	Foreign Trade.	Coasting Trade.		Foreign and Coasting Trade.	
		1912-13.		1912-13.	1911-12.
	1912-13.	Indian.	Provincial.	Per cent.	Per cent.
	Per cent.	Per cent.	Per cent.	Per cent.	Per cent.
Moulmein	4·95	6·39	21·46	6·51	5·61
Bassein	8·35	·89	·11	5·61	4·16
Akyab	3·42	7·74	11·38	5·23	5·70
Tavoy	·65	·01	10·82	1·12	1·14
Mergui	·31	·03	10·33	·92	·88
Kyaukpau		·05	1·19	·10	·10
Victoria Point	·10		·35	·09	·05
Sandoway		·03	·60	·05	·05
Total Subordinate ports	17·78	15·14	55·61	19·63	17·66
Rangoon	82·22	84·86	44·36	80·37	82·34
GRAND TOTAL	100·00	100·00	100·00	100·00	100·00

Rangoon's share of the foreign trade declined from 85·92 in 1911-12 and 86·27 in 1910-11 ; this is due to the diversion of part of its rice export trade to Bassein, and there seems to be little doubt that the explanation is to be found in the increasing port charges and the difficulties of shipment at Rangoon ; for in the year under review the condition of the river was such that 231 vessels had to go below the Hastings shoal to finish their loading.

Moulmein.—In the year 1863-64, the first complete financial year after the three provinces of Pegu, Arakan and Tenasserim had been united, Moulmein enjoyed nearly a third of the total trade of the new province of British Burma, by far its leading export being that of teak wood. For twenty years, Moulmein shipped three-quarters of the province's exports of teak, the rest being sent from Rangoon. The latter port then began to increase its share, and though the third war checked this development for a time, Rangoon took leading place soon after the restoration of peace. This was due rather to the new opportunities given to timber traders in those forests of Upper Burma which are served by the Irrawaddy, than to a decline in the shipments from Moulmein: but since that time there has been a slight tendency for Rangoon's exports to increase, while Moulmein has steadily retrogressed, till the average annual exports are now less than half what they were fifty years ago. In the year under review, Moulmein's shipments though considerably better than in the year 1911-12 were only a quarter of the total from the Province, the other three-quarters going from Rangoon. It has been the complaint repeated at intervals for forty years that supplies in the forests which give their timber to the Salween river are becoming exhausted.

Moulmein has always held fourth place among the ports of Burma as an exporter of rice. In the year 1863-64 it accounted for 16,000 tons out of 380,000 tons from the whole province: and though Moulmein took its part in the general growth of this trade, its share was never as much as ten per cent. even at a period when Rangoon's share was little more than half of the whole; while the later progress of the Chief Port has thrown Moulmein into yet more pronounced eclipse in this trade. The opening of the railway to Martaban has had no stimulating effect on the rice trade, which in fact declined between 1909 and 1912; while the development of Tenasserim will, by increasing the population, cause a greater local demand, which will still further restrict the supplies available for export. The year 1912-13 showed a considerable increase in exports of rice from Moulmein, but this may be only a temporary spurt due to abnormal prices offered.

The year under review was marked by an improvement also in imports, both foreign and coasting, the value of foreign imports being the highest yet recorded. The importation of large quantities of *sugar* direct from foreign ports was the chief feature in this rise. It does not, however, seem likely that Moulmein will go much further in improving its importance as a centre of commerce, especially in view of the difficulties of navigation in the river.

Akyab differs from Moulmein in that it has a considerable trade with India proper; but its chief importance is as an exporter of *rice*, the 'necranzie' and 'larong' varieties being shipped hence. Fifty years ago it exported little less rice than Rangoon itself, but geographical limitations account for the fact that its supplies have not advanced very much in the latter part of the interval, and it may be assumed that it will maintain a steady business on the present lines without any considerable expansion. A decline is actually recorded in the year 1912-13 as against the previous year, though the total rice exports of Burma increased considerably.

Bassein is in the peculiar position of having practically no seaborne trade except exports of rice, other traffic being carried by rail or inland waterways. Its rice trade developed considerably about thirty-five years ago, and since then it has generally surpassed Akyab, though its advance seems small beside that of Rangoon. For the last few years Bassein has been improving its relative position and in 1912-13 its share of the rice exports of the province amounted to 14 per cent. as against 11 per cent. in the previous year. This may be partially explained by the supposition that increasing advantage is being taken of the railway, which was opened in 1902, but there is also the fact that part of the trade is actually being diverted from Rangoon to Bassein for reasons stated earlier in this paragraph. Such a diversion from Rangoon to Bassein might not have been easy some years ago, but big millers have recently adapted their mills at Bassein to the production of finer qualities of rice. Bassein's exports will continue to expand, but the trade is of so seasonal a character that it is not likely to attract a regular line of steamers, without which it will not develop an import trade. If the elevator project were applied here in order to spread the shipments of rice out over the year, the port might have a great future before it.

Tavoy, Mergui, and Victoria Point.—The trade of these Tenasserim coast ports forms still as it has always done, a very small proportion of the whole trade of Burma; but of recent years it has begun to develop in an interesting way owing to the gradual opening up of the country, most of which had for years consisted of unexplored jungle. Shipments of *wolfram*, *tin* and *rubber* have caused the export trade of this region almost to double itself in five years; and the import trade has kept pace with this. The ports are in direct communication with the Straits Settlements, and it behoves Rangoon merchants not to allow their trade to slip into the hands of Penang; steamer communications with Rangoon have been recently improved and Rangoon still retains the bulk of the trade. It is, however, significant that while the coasting imports in the year under review advanced by only 14 per cent. (6½ lakhs), the advance in foreign imports (2¼ lakhs) was 50 per cent. of the previous year's figures. There are a number of small ports and settlements up and down the coast and among the islands of the Archipelago and no adequate steps have yet been taken to prevent smuggling from the adjacent non-British waters; with the growth of these settlements in number and importance, the matter is becoming a serious one and some form of coastguard service is required.

4. Total Revenue.—The following statement shows the gross and net *Customs duty*, inclusive of the duty on *imported salt*, realized in the Province of Burma in the periods shown:—

	Average for the five years ending 1908-09.	1909-10.	1910-11.	1911-12.	1912-13.	Increase or decrease in 1912-13 as compared with 1911-12.	
						More.	Less.
	Rs.	Rs.	Rs.	Rs.	Rs.	Rs.	Rs.
Import duty (excluding duty on salt) ...	53,04,275	57,10,067	66,45,647	69,92,003	81,62,604	11,70,601	...
Import duty on salt ...	14,44,271	17,65,649	17,63,918	18,21,572	16,79,206	...	1,42,667
Export duty ...	77,95,116	77,10,120	93,43,057	98,66,185	1,08,21,336	9,55,151	...
Total, Gross duty ...	1,45,43,662	1,52,15,836	1,82,42,622	1,86,80,060	2,06,63,145	19,83,085	...
Refunds and Drawbacks—							
Imports ...	65,183	76,891	74,461	68,492	93,615	25,123	...
Exports ...	1,28,865	1,15,043	1,83,641	2,06,278	1,64,250	...	42,028
Total ...	1,94,048	1,94,934	2,58,102	2,74,770	2,57,865	...	16,905
Total, Net duty ...	1,47,37,710	1,50,20,902	1,79,84,520	1,84,05,290	2,04,05,280	19,99,990	...

There was an improvement of 10·6 per cent. in the gross collections. Imports and Exports were 16·7 and 9·7 per cent. better, but under Salt there was a shrinkage of 7·8 per cent. Under import duty "Liquors" contributed Rs. 23·66 lakhs, "Cotton piece-goods," Rs. 13·18 lakhs, "Tobacco" Rs. 7·99 lakhs, Sugar, Rs. 3·55 lakhs, "Silk piece-goods," Rs. 3·40 lakhs, "Petroleum" Rs. 1·65 lakhs and "All other articles" Rs. 28·10 lakhs.

Rangoon's share of the total gross revenue was Rs. 171·82 lakhs and in addition a sum of Rs. 24·35 lakhs was collected on account of exports of rice from outports. The total revenue of the outports amounted to Rs. 34·81 lakhs, of which Rs. 32·81 lakhs represented export duty on rice.

The collections at the various outports were Bassein Rs. 17·93 lakhs, Moulmein Rs. 8·85 lakhs, Akyab Rs. 7·21 lakhs, Tavoy Rs. 57 lakh, Mergui Rs. 20 lakh and Victoria Point Rs. 05 lakh.

Subordinate Ports.—The following table shows the *Customs receipts and disbursements* of the year under review as compared with the previous year:—

Receipts (Budget heads III and VII).	1911-12.	1912-13.	Disbursements (Budget heads I and IX).	1911-12.	1912-13.
	Rs.	Rs.		Rs.	Rs.
Import duty on Salt ...	12,250	7,415	Salaries, etc. ...	91,653	90,198
Import duty (excluding duty on Salt) ...	1,63,432	1,92,408	Refunds ...	89,533	37,773
Export duty ...	25,60,105	32,81,047			
Miscellaneous collections ...	8,905	9,269			
Total Receipts ...	27,34,692	34,90,187			
Total Disbursements ...	1,31,191	1,27,971			
Net Revenue ...	26,03,501	33,62,166	Total Disbursements ...	1,31,191	1,27,971

The *net revenue* collected advanced by Rs. 7·59 lakhs or 29 per cent. Akyab's collection of *salt duty* was Rs. 07 lakh as against Rs. 11 lakh. Towards *import duty (excluding salt)* Moulmein's contribution was Rs. 88 lakh as against Rs. 77 lakh. Akyab was responsible for Rs. 69 lakh as against Rs. 57 lakh. Bassein's share of the *export duty* was Rs. 17·93 lakhs as against Rs. 13·04 lakhs. Moulmein contributed Rs. 7·98 lakhs as against Rs. 5·30 lakhs in the previous year while Akyab's share fell from Rs. 6·81 lakhs to Rs. 6·45 lakhs.

5. Price levels.—The following table shows the variations in the *average prices* of certain representative articles in the *foreign* trade of *Rangoon*, the mean of the average prices of the three years ending 1900-01 being taken as the basis for comparison and entered as 100:—

	1898-01.	1908-09.	1909-10.	1910-11.	1911-12.	1912-13.
Imports.						
Iron and Steel ... Cwts.	100	113·1	113·1	112·6	115·7	118·3
Mineral Oils (excluding paraffin wax). Galls.	100	98·5	93·9	44·1	38·6	31·6
Salt ... Tons.	100	82·0	67·5	85·8	90·7	97·9
Sugar, refined ... Cwt.	100	83·1	88·9	87·4	97·9	95·2
Cotton—Twist and Yarn ... lbs.	100	150·8	141·7	167·0	157·6	151·9
" Piece-goods—grey ... Yds.	100	153·5	165·1	183·9	183·2	190·6
" " white ... "	100	148·6	115·9	163·8	158·9	160·1
" " coloured, etc. ... "	100	142·1	133·9	158·2	150·5	143·9
Silk—piece-goods (pure) ... "	100	103·9	95·3	94·2	94·1	98·6
Woollen piece-goods ... "	100	136·7	129·4	150·5	161·4	126·1
Exports.						
Rice not in the husk ... Cwts.	100	124·1	111·6	120·8	142·6	160·2
Rice bran ... Tons.	100	170·5	155·9	161·7	171·0	168·2
Wood, Teak ... C. Tons.	100	130·9	120·6	139·7	122·7	122·6
Hides, raw ... Cwts.	100	118·8	121·2	141·6	138·1	154·0
Cotton, raw ... "	100	121·9	142·5	177·4	166·8	156·9
Cutch and gambier ... "	100	75·1	146·5	92·9	81·1	78·9
Rubber, raw ... "	100	108·3	119·3	177·9	165·6	170·9
Lead ... "	100	109·9	108·4	127·9	167·6	152·1
Paraffin wax ... "	100	109·9	108·4	108·8	107·2	107·8
Candles ... lbs.	100	84·3	84·3	84·7	84·7	84·4

demand and represented 52 per cent. of the total imports, *white* representing 33 per cent. The United Kingdom's share of the total trade was 83 per cent. followed by Holland with 11 per cent., consisting principally of *coloured sarongs*. The increase is attributed to the prosperity of the people and there was a good demand during the year; it must however be remembered that heavy imports were made towards the end of the year and considerable stocks were carried over.

Piece-goods (Coasting trade).—Imports advanced by over 3 million yards and Rs. 5 lakhs. *Coloured, printed and dyed goods* comprised more than one-half of the total imports. The direct imports from Bombay were valued at Rs. 27.16 lakhs, from Calcutta goods valued at Rs. 25.59 lakhs were consigned, a large proportion of which was probably manufactured in Bombay. From Madras and Pondicherry goods worth Rs. 12 lakhs and Rs. 3.93 lakhs respectively were received.

Other cotton manufactures (Foreign trade).—Blankets represented Rs. 19.22 lakhs of which Germany supplied Rs. 8.91 lakhs, Holland Rs. 6.23 lakhs and Belgium Rs. 3.58 lakhs. *Handkerchiefs and shawls in the piece* advanced from Rs. 2.49 lakhs to Rs. 5.73 lakhs, chiefly from the United Kingdom. *Hosiery* fell from Rs. 18.17 lakhs to Rs. 16.73 lakhs; Japan dropped from Rs. 9.69 lakhs to Rs. 6.14 lakhs, while Germany increased her contributions from Rs. 5.65 lakhs to Rs. 8.31 lakhs. *Sewing thread*, mostly from the United Kingdom, advanced from Rs. 7.30 lakhs to Rs. 9.15 lakhs.

8. Textiles—Silk.

	1908-09.		1909-10.		1910-11.		1911-12.		1912-13.	
	Lbs.	Rs. Lakhs.	Lbs.	Rs. Lakhs.	Lbs.	Rs. Lakhs.	Lbs.	Rs. Lakhs.	Lbs.	Rs. Lakhs.
RAW SILK—										
From Straits Settlements ..	167,238	9.74	103,073	5.32	117,588	6.90	136,118	6.43	96,930	4.68
" Hongkong ..	41,702	3.16	81,856	1.91	81,121	4.44	100,975	6.55	118,703	8.30
" China ..	504,583	15.77	204,269	9.99	60,083	3.19	163,190	9.44	312,458	17.16
" Other countries ..	2,806	.07	5,489	.29	13,040	.65	8,808	.15	31,559	1.30
Total ..	479,279	23.71	394,687	17.51	271,832	14.18	393,088	22.57	549,750	31.44
MANUFACTURES—										
Piece-goods, mixed—										
From United Kingdom ..	90,526	.91	107,915	1.11	172,235	1.71	188,463	1.95	493,514	4.33
" Other countries ..	211,402	1.79	163,871	1.19	287,980	1.81	99,225	.70	118,405	.81
Total ..	301,928	2.70	263,786	2.30	460,215	3.52	287,688	2.65	611,919	5.14
Piece-goods, pure—										
From United Kingdom ..	225,633	2.26	26,174	.27	15,900	.28	85,848	.47	43,074	.35
" Japan ..	9,382,213	53.07	8,814,698	46.39	8,181,482	42.33	9,716,526	50.41	11,345,421	61.86
" Straits Settlements ..	50,581	.64	43,277	.34	55,775	.55	28,933	.34	34,668	.41
" Other countries ..	96,454	1.21	70,616	.86	61,145	.78	82,876	1.10	121,900	1.46
Total ..	9,564,863	57.08	8,954,655	47.60	8,294,303	43.94	9,594,188	52.36	11,515,133	64.08
TOTAL VALUE OF SILK ..		85.62		67.81		61.61		77.58		101.65

Raw silk.—The imports of *raw silk* both in quantity and value were the highest on record and indicate the healthy condition of the local silk weaving industry; there were however considerable stocks in dealers' hands at the close of the year. The supplies were obtained from China and Indo-China and a small quantity from Siam. The overland arrivals from Western China were approximately 161,280 lbs. worth Rs. 9.11 lakhs as against 102,612 lbs. valued at Rs. 5.71 lakhs.

Piece-goods (pure).—Japan has a monopoly of this trade and supplied 97 per cent. of the total imports. The imports were the highest on record and there was also a rise in prices.

Goods of silk mixed with other materials increased by 94 per cent. in value, the bulk arriving from the United Kingdom. Under this head are included piece-goods of *cotton mixed with artificial silk* for which a good demand has lately sprung up and promises to increase.

The arrivals overland of *silk piece-goods* from Siam were valued approximately at Rs. 6.41 lakhs as against a value of Rs. 5.48 lakhs in 1911-12.

9. Textiles—Wool.

	1908-09.		1909-10.		1910-11.		1911-12.		1912-13.	
	Lbs.	Rs. Lakhs.	Lbs.	Rs. Lakhs.	Lbs.	Rs. Lakhs.	Lbs.	Rs. Lakhs.	Lbs.	Rs. Lakhs.
Yarn and knitting wool ..	52,022	1.05	49,858	1.08	49,823	1.11	54,266	1.15	61,710	1.38
Carpets and rugs ..	995,069	10.50	657,802	7.05	350,416	4.09	268,097	3.11	570,803	6.04
Hosiery ..	114,906	3.03	49,068	1.28	51,179	1.88	81,862	2.58	113,764	2.95
Piece-goods ..	4,043,777	42.58	1,251,366	12.60	1,610,963	18.00	1,985,153	23.34	1,621,787	17.96
Shawls ..	518,467	7.40	181,133	2.71	200,735	2.73	415,621	6.53	729,397	9.08
Other goods ..	150,299	1.09	126,448	.95	126,560	.84	117,004	1.02	144,836	1.27
Total ..		65.88		25.77		28.29		36.17		38.69

There has been a steady improvement since 1909-10 and the trade has now settled down to normal conditions. The fall in *piece-goods* is attributed to the competition of well imitated cotton tweeds and coatings. There was a good demand for *shawls* and *carpets and rugs*. The share of the United Kingdom in the total trade fell from Rs. 22.93 lakhs to Rs. 19.61 lakhs,

whereas that of Germany advanced from Rs. 11.57 lakhs to Rs. 13.51 lakhs. Italy recovered her trade in *rugs* which was interfered with last year owing to the boycott.

10. Apparel, etc.—From this head, *Haberdashery and millinery* and *Boots and shoes* have now been excluded as well as *Hosiery*. *Apparel (including drapery, etc.)* showed a decline which is only partially accounted for by the exclusion this year of *second-hand clothing* and the important item of *waterproofed clothing*; on the other hand, *hats, caps and bonnets* advanced by Rs. .63 lakh to Rs. 3.55 lakhs. The *hat* trade is principally in the hands of United Kingdom manufacturers, but Italy has considerably strengthened her position.

Of the total value under this head the United Kingdom contributed 69 per cent. as against 73 per cent. in the previous year. Germany is getting a better share of the trade in *gold and silver thread* which is hardly touched by the United Kingdom.

Part of the decline under *apparel* is due to a decrease in importations of *cotton pocket handkerchiefs* from Rs. 2.25 lakhs to Rs. 1.61 lakhs. Another important item, however, *viz., belts*, remained stationary at Rs. 1.49 lakhs.

11. Haberdashery and Millinery—There was a further improvement under this head, the total value recorded being Rs. 22.57 lakhs as against Rs. 17.91 lakhs, showing an increase of 26 per cent. The share of the United Kingdom remained unchanged at 47 per cent. of the total; Japan's share fell from 32 to 37 per cent. *Cotton towels*, which form the bulk of her contribution under this head, advanced by nearly Rs. 1 lakh, but the United Kingdom took most of this increase. Japan however still retains leading place in this trade.

12. Boots and Shoes.—Imports increased by 22,782 pairs and Rs. 1.59 lakhs to 670,636 pairs valued at Rs. 15.19 lakhs. Ninety-one per cent. came from the United Kingdom, where the *boot* trade was in a flourishing condition in spite of the increased cost of raw material and labour. *Boots and shoes of leather* were valued at Rs. 11.89 lakhs and of *other materials* at Rs. 3.30 lakhs.

13. Metals and Ores.

	1908-09.		1909-10.		1910-11.		1911-12.		1912-13.	
	Cwt.	Rs. Lakhs.	Cwt.	Rs. Lakhs.	Cwt.	Rs. Lakhs.	Cwt.	Rs. Lakhs.	Cwt.	Rs. Lakhs.
BRASS ..	3,212	2.37	2,427	1.98	2,917	1.90	1,954	1.47	1,599	1.42
COPPER ..	8,008	3.50	4,913	2.64	4,450	2.36	2,644	1.54	2,555	1.56
IRON—										
Pig ..	1,117	.77	2,117	1.41	1,305	.97	612	.42	208	.15
Manufactures of Iron or Steel—										
Beams, pillars, girders, etc., ..	5,785	6.93	3,755	5.90	2,533	3.56	3,227	4.91	1,279	1.88
Nails, rivets and washers ..	4,325	6.95	3,013	5.30	4,131	7.23	3,473	5.92	4,439	7.87
Pipes and tubes and fittings ..	8,855	22.62	9,477	23.01	7,312	17.55	4,216	9.22	9,760	18.80
Sheets and plates all kinds. ..	22,226	46.00	25,274	51.20	20,473	42.82	19,872	41.64	22,416	51.11
Other manufactures ..	21,712	43.85	18,482	32.22	29,100	31.58	17,148	31.05	13,390	21.45
Total Manufactures of Iron or Steel ..	68,933	1,27.71	69,461	1,17.70	64,501	105.74	47,236	94.71	50,884	1,01.11
LEAD ..	2,288	.53	3,616	1.06	3,973	.59	3,751	.42	2,349	.49
QUICKSILVER ..	2,823	.05	798	.01	2,385	.05	106	.01	119	.01
TIN ..	843	.36	210	.23	277	.34	118	.22	155	.25
ZINC OR SPelter ..	4,973	1.6	3,930	.31	5,817	1.25	5,635	1.45	7,485	1.89
OTHER SORTS OF METALS ..	8,633	2.50	9,016	2.93	5,493	1.23	2,660	.69	2,178	1.60
TOTAL OF METALS AND ORES TONS ..	63,440	1,38.84	63,391	1,28.65	57,404	1,14.33	43,335	1,01.86	51,356	1,08.40

There was a slight recovery under this head, imports rising by 4 per cent. in volume and by 6 per cent. in value. *Brass and copper* continued to decrease. *Pig iron* showed further reduction, but imports from Bengal again advanced from 559 tons to 913 tons. The most noticeable contractions were under *beams, pillars, girders, etc.,* and *galvanised sheets and plates* for buildings and under *pipes and fittings* for the oil industry. More *tinned plates* were imported for the oil refineries.

The following is the distribution of the trade according to the principal countries of consignment during the past three years:—

	1910-11.	1911-12.	1912-13.	1910-11.	1911-12.	1912-13.
United Kingdom ..	7,776	61.96	70.40	Belgium ..	19.76	9.96
United States ..	25.46	21.30	20.80	Germany ..	4.59	4.23

The United Kingdom supplied the bulk of the *beams, pillars and girders, galvanised sheets and plates* and *tinned plates*. The United States sent *pipes and fittings* for the oil wells and also increased supplies of *nails and rivets*.

14. Hardware.—The values of the articles falling under this heading were as follows during the past three years:—

	1910-11.	1911-12.	1912-13.		1910-11.	1911-12.	1912-13.
	Rs. Lakhs.	Rs. Lakhs.	Rs. Lakhs.		Rs. Lakhs.	Rs. Lakhs.	Rs. Lakhs.
1. Agricultural implements ..	6.1	.47	.92	7. Lamps, metal ..	...	...	...
2. Buckets of tinpl., etc., iron (a) ..	...	...	1.11	8. Lamps, glass ..	...	...	...
3. Builders' hardware, etc., (a) ..	...	...	2.98	9. Parts of lamps, etc., ..	3.25	2.70	...
4. Domestic hardware, etc., (a) ..	...	...	6.19	10. Safes and strong boxes of metal (a) ..	...	...	...
5. Enamelled ironware ..	6.38	7.48	13.22	11. Other sorts ..	...	...	...
6. Implements and tools, etc., ..	6.97	4.37	6.94	Total ..	88.98	89.48	46.09

(a) Included under Other Sorts prior to 1st April 1912.

Cutlery, electroplatedware and sewing machines, hitherto included under this head, now appear separately. There was a very healthy expansion in this line of trade and supplies readily went into consumption. It must be remembered, however, that part of the increase is explained by the general rise in prices of metals. The imports of *enamelled ironware* advanced in a remarkable manner and it is evident that this class of goods is rapidly coming into universal use. Another interesting feature was the large number of *safes* imported, *viz.*, 2,014. This points to the growing wealth of the people; it was unfortunate, however, that a large proportion of these safes were of a very shoddy make, the frame-work being of flimsy iron sheets and the lining packed with factory sweepings, neither fire nor burglar proof. The United Kingdom contributed Rs. 21'82 lakhs to the total trade, she supplied the bulk of the *agricultural and other implements and tools, builders' and domestic hardware, buckets and weighing machines*, and more than one-third of the *lampware*. Austria-Hungary followed with Rs. 9'26 lakhs made up of Rs. 7 lakhs of *enamelledware* and *safes* and *lampware*. Germany's share was Rs. 8'15 lakhs, *enamelledware* Rs. 3'30 lakhs, *lampware* Rs. 1'33 lakhs. The United States of America sent *tools and implements and miscellaneous articles* worth Rs. 3 lakhs.

15. Machinery and Millwork.—The total value of Rangoon foreign imports declined from Rs. 43'89 lakhs to Rs. 31'31 lakhs. Two-thirds of this quantity was from the United Kingdom, the balance being shared between the United States and Germany. The fall was most marked under the heads *primemovers* and *mining and oil-well machinery*; while *boilers, electrical machinery, plant for candlemaking and match-making and parts of steam dredgers* also contributed to the decline. There were on the other hand interesting advances in imports of machinery for *rice-mills, saw-mills and oil-crushing and refining plants*.

16. Railway Plant and Rolling Stock.—The total foreign imports into Rangoon under this head advanced from Rs. 22'20 lakhs to Rs. 29'85 lakhs in value, the United Kingdom contributing almost the whole. The increase, which is most marked under the heads "*Locomotive engines and tenders, etc.*" and "*Rails, chairs and fishplates*," is partly attributable to the strong rise in Sheffield prices for railway steel during 1912, and partly to construction works on the Southern Shan States line and the Buthidaung-Maungdaw Tramway in the Akyab district.

17.

Provisions.

	1908-09.		1909-10.		1910-11.		1911-12.		1912-13.	
	Tons.	Rs. Lakhs.	Tons.	Rs. Lakhs.	Tons.	Rs. Lakhs.	Tons.	Rs. Lakhs.	Tons.	Rs. Lakhs.
Biscuits	3,206,886	12'38	2,881,736	11'50	3,125,853	13'40	3,152,975	14'21	4,149,784	20'87
Butter	18,017	2'11	217,904	2'51	213,265	2'31	242,455	2'67	248,816	2'74
Canned and bottled provisions	24,163	5'82	26,154	10'21	24,922	10'01	25,720	10'22	37,939	14'64
Farinaceous foods	65,421	9'01	50,600	7'51	49,191	7'11	61,318	7'97	87,422	9'37
Milk, condensed and preserved	4,885,181	12'37	5,242,232	13'54	5,447,617	12'77	6,258,493	16'46	7,975,425	20'87
Other kinds of oilman's stores	...	6'22	...	6'56	...	6'61	...	6'71	...	9'06
Total of oilman's stores	...	58'01	...	51'88	...	52'11	...	53'25	...	77'48
Fish, in bulk, dry, unsalted	7,662	1'65	13,521	3'01	13,027	3'21	14,950	3'50	13,754	3'24
Fish, in bulk, salted	104,535	20'83	107,646	22'14	77,665	13'64	81,316	16'85	86,772	16'84
Fish, wet, salted (<i>ngapi</i>)	99,708	5'19	74,979	4'17	52,753	2'91	86,379	1'95	37,230	1'91
Total cwt.	215,905	26'67	166,048	29'32	143,445	19'82	133,545	21'30	137,746	21'99
Fruits and vegetables, in bulk, dried, etc.	81,550	2'30	20,866	1'82	21,767	1'81	33,221	2'45	36,523	2'58

Oilman's stores.—The consumption continues to grow in a remarkable manner. Ten years ago the value of the imports of *condensed milk* and of *biscuits* was Rs. 1'71 and Rs. 1'33 lakhs, respectively, whereas to-day they each represent over Rs. 20 lakhs. Besides these two articles, large quantities of canned and bottled provisions, such as *jams, preserved fruit, sardines* and *other fish, farinaceous and patent foods, etc.*, are being consumed by the people of this country and this is an indication of the high standard of living as compared with other Provinces of India. Burma took twice as much "milk" during the year as all the rest of India put together. The United Kingdom's share of the total trade was 52 per cent., she supplied more than half the *condensed milk*, most of the *biscuits, bacon and hams, jams and jellies and pickles, etc.* Denmark supplied 141,000 lbs. of *butter*. Holland sent large quantities of *skimmed milk* and 75,000 lbs. of *cheese*. Portugal sent 1,200,000 lbs. of *sardines*. *Lard* to the extent of 78,000 lbs. came from the Straits and Hongkong. Germany supplied some *biscuits* and *skimmed milk*. *Sago and tapioca* came from the Straits.

Fish, unsalted and salted.—Although the imports were slightly larger than in 1911-12, this trade has declined considerably during recent years. Burma now imports *cured fish* to the value of nearly Rs. 50 lakhs from India and foreign countries, but when the fisheries on the coast are more fully developed she should be in a position not only to supply her own wants, but to export this commodity.

A proposal was made in the course of the year to place "salted fish" on the same footing as other provisions in the Tariff; the rate now in force, though it appears in Schedule III and is therefore ostensibly a specially high rate, yielding in fact considerably less than the ordinary 5 per cent. *ad valorem* rate would yield. This is due to the superior quality of most of the *dry salted fish* imported from China.

Imports of *provisions* coastwise advanced from Rs. 83'24 lakhs to Rs. 94'45 lakhs. The principal items and sources of supply were, *fish, dry, unsalted*, Rs. 22'16 lakhs, Madras; *ghi*, Rs. 21'87 lakhs, *dry beef* (biltong) Rs. 20'22 lakhs, *fruits and vegetables*, Rs. 10'24 lakhs, Calcutta; *eggs*, Rs. 7'52 lakhs, Chittagong; and *butter*, Rs. 3'35 lakhs, Bombay. Besides these articles large numbers of *goats, sheep and poultry* were imported from Calcutta and Chittagong. With the opening up of the Shan States, we may expect that much of this trade in farm produce will in the future be supplied from within the province; a beginning has already been made and *exports of potatoes* from Burma were valued at about two lakhs during the year.

18.

Salt.

	1908-09.		1909-10.		1910-11.		1911-12.		1912-13.	
	Tons.	Rs. Lakhs.	Tons.	Rs. Lakhs.	Tons.	Rs. Lakhs.	Tons.	Rs. Lakhs.	Tons.	Rs. Lakhs.
From United Kingdom	5,588	1'12	179	1'11	2,159	1'60	15,488	8'46	8,417	1'55
" Germany	19,777	4'08	24,082	3'59	29,077	5'47	28,725	6'49	25,490	5'84
" Spain	...	...	9,975	1'42	3,789	1'70	1,139	1'78	8,861	1'11
" Aden	16,171	2'55	7,042	1'48	4,862	1'19	11,824	2'46	8,458	2'04
" Egypt	4,594	1'71	10,473	1'64	13,693	2'86	4,104	1'90	13,568	2'07
" Turkey, Asiatic (Salt)	10,598	1'96	11,844	1'97	...	...	5,501	1'96	5,785	1'00
" Other countries	1	...	3	...	4	...	2	...	...	...
Total	56,714	10'87	83,922	9'93	53,534	10'88	72,827	15'00	65,629	14'61

There was a decline of 10 per cent. in the quantity imported, the decrease being shared by all varieties except *Salif*, which remained substantially the same and Egyptian which showed a large increase. The fluctuations in the amount of salt imported from the different countries seem to depend very largely on freight facilities. For instance, in 1911-12 regular consignments of English salt were brought by the Patrick Henderson steamers, whereas during the year under review, these steamers were usually fully laden with general cargo and so unable to carry salt. During the strike, there was room but as no English salt was available, on two occasions they loaded salt at Port Said.

The amount which passed into home consumption also decreased, the respective quantities for 1911-12 and the year under review being 65,573 and 60,869 tons. Prices were maintained at higher level than last year, which fact coupled with the increase (to the extent of nearly 1,500 tons) in the imports of country salt into Rangoon, would suggest one reason for the decrease in the consumption of foreign salt. It appears also that the fishery season was not such a successful one as that of the previous year, and consequently the demand for salt diminished. English and German salt were quoted at Rs. 81 per 1,000 viss (inclusive of duty) practically throughout the year and Aden, Port Said and Spanish at Rs. 80. The consignment of *Salif* salt which arrived during February was quoted at Rs. 79 on arrival, but fell to Rs. 76 during the last month of the year.

19.

Sugar.

	1908-09.		1909-10.		1910-11.		1911-12.		1912-13.	
	Cwt.	Rs. Lakhs.	Cwt.	Rs. Lakhs.	Cwt.	Rs. Lakhs.	Cwt.	Rs. Lakhs.	Cwt.	Rs. Lakhs.
REFINED SUGAR—(16DS AND ABOVE)	47,884	45'16	486,872	45'14	439,088	42'97	391,068	43'59	595,759	57'80
UNREFINED SUGAR (16DS AND UNDER)	...	...	...	...	44	...	267	0'04	...	...
MOLASSES	1	...	1,034	0'08	8	...	455	0'01	10,811	0'31
CONFECTIONERY	...	...	8,348	3'03	8,678	3'21	8,880	3'23	12,742	3'94
SACCHARIN	1,2	...	702	0'08	1,441	0'06	8,808	0'08	8,808	0'10
GRAND TOTAL, SUGAR	48,015	...	496,280	51'21	440,826	46'23	400,175	46'95	619,342	62'05

The imports of *refined sugar* were the highest on record, the increase over 1911-12 being 52 per cent. in quantity and 33 per cent. in value. The fall in prices probably stimulated the import trade, but the people of the country had plenty of cash to spend on luxuries of which sugar is one of the most important. Of the total imports Java contributed 86 per cent. or 510,477 cwts. valued at Rs. 48'62 lakhs; besides this about 52,000 cwts. consigned from the Straits Settlements was mostly Java sugar. About 25,000 cwts. of *cane sugar* came from Hongkong and Austria-Hungary sent a consignment of 6,000 cwts. of *beet sugar*. Java sent over 10,000 cwts. of *molasses* for use in spirit distilleries in place of *jaggery* from India. The consumption of *confectionery* from the United Kingdom continues to increase.

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N12

Liquors.

		1908-09.		1909-10.		1910-11.		1911-12.		1912-13.	
		Galls.	Rs. Lakhs.	Galls.	Rs. Lakhs.	Galls.	Rs. Lakhs.	Galls.	Rs. Lakhs.	Galls.	Rs. Lakhs.
ALE, BEER AND PORTER	Liquid	1,082,480	19.36	898,644	13.24	876,272	14.84	915,300	15.79	1,223,070	22.87
CIDER AND OTHER FERMENTED LIQUORS.	"	885	.02	625	.02	1,779	.05	986	.04	1,175	.04
SPIRITS—											
Brandy	Liquid	104,473	8.41	103,376	7.69	84,975	6.63	80,752	6.38	93,196	7.57
Gin	"	18,015	.61	19,686	.70	12,309	.47	11,794	.47	14,111	.56
Rum	"	42,124	.47	45,607	.50	22,475	.26	31,544	.36	35,955	.39
Whisky	"	81,885	5.45	77,551	5.10	76,459	4.99	76,611	5.12	80,565	5.25
Liqueurs	"	1,197	.17	1,391	.18	1,318	.18	1,099	.15	1,327	.20
Spirit, present in drugs, etc.	"	5,163	1.06	4,524	.75	6,226	1.09	6,669	1.11	8,427	1.44
Spirit, perfumed	"	4,420	2.40	3,013	1.03	2,491	2.92	3,593	2.95	3,831	2.43
Spirit, methylated	"	8,116	.15	2,372	.04	7,750	.13	3,983	.07	3,707	.08
Other sorts of spirit	"	8,829	.60	11,101	.63	11,810	.71	11,432	.77	15,811	1.02
Total of Spirit	Liquid	274,601	19.33	264,730	17.21	226,877	16.53	226,987	16.77	260,613	18.91
Wines—											
Champagne	Liquid	2,925	.75	2,628	.71	3,009	.80	2,643	.66	2,457	.65
Port	"	11,063	.72	11,091	.71	11,315	.69	11,572	.70	11,731	.79
Sherry	"	2,190	.15	2,713	.14	2,011	.14	2,170	.11	2,655	.15
Other sorts	"	21,848	.90	19,937	.82	19,114	.73	17,593	.75	20,777	.83
Total of Wines	"	38,337	2.52	37,009	2.37	35,709	2.36	33,903	2.22	37,542	2.43
TOTAL LIQUORS	"	1,866,253	41.23	1,801,898	34.81	1,110,237	37.88	1,177,201	34.82	1,521,500	44.24

Ale, Beer and Porter.—Imports increased by 31 per cent. in quantity and 45 per cent. in value being the highest on record; the increase may be attributed to general prosperity and to the taste which the Burman is acquiring for *beer*. The United Kingdom supplied 1,001,301 gallons and Germany 211,194 gallons. Germany's share of the trade was over 20 per cent. against 10 per cent. in 1906-07.

Spirits.—Imports improved by 13,046 gallons and nearly equalled the figures for 1909-10, at the close of which year the present rates of duty were fixed. The principal sources of supply were the United Kingdom, 77,394 gallons of *whisky* and 6,202 gallons of *gin*; France, 75,780 gallons of *brandy*; Germany, 11,954 gallons of *brandy* and 2,917 gallons of *whisky*; Holland, 5,174 gallons of *brandy* and 5,298 gallons of *gin*; Java, 38,267 gallons of *rum*. Clearances for consumption of *brandy*, *gin*, *rum* and *whisky* advanced from 175,840 proof gallons to 190,880 proof gallons, the most noticeable improvement being under *brandy* and *rum*, which are largely consumed in the liquor shops. There was also an advance from 11,032 liquid gallons to 15,811 liquid gallons under *spirits*, *other sorts*, principally "*shamshoo*" from China. The increase is attributed to the prosperity of the people and to the measures adopted by the Excise Department to check illicit distillation.

The increase in the consumption of patent medicines is indicated by the increase in the quantity of *spirit present in drugs, etc.* Under *spirits other sorts* an increasing quantity of flavouring essences for aerated waters is being imported. There was a slight fall of about 200 gallons in the quantity of *methylated spirit* imported, but the quantity of *Java rum* denatured locally advanced from 6,640 gallons to 8,488 gallons.

Wines.—There has been a general improvement in this trade, under *other sorts*. *Claret* and *vermouth* are the chief items; the consumption of the latter is on the increase.

21. Tobacco.—Imports from foreign countries rose from 620,028 lbs. and Rs. 13.65 lakhs to 635,983 lbs. and Rs. 14.31 lakhs. *Cigarettes* from the United Kingdom was the main item under this head, accounting for 583,743 lbs., worth Rs. 13.27 lakhs. The quantity of *cigars* advanced from 3,681 lbs., to 3,953 lbs. but *manufactured tobacco* fell from 50,885 lbs. to 46,794 lbs. The quantity cleared for consumption, principally *cigarettes* advanced, from 562,424 lbs. to 648,157 lbs. or by 15 per cent. The balance remaining in bond at the close of the year was 68,820 lbs. against 92,776 lbs. in the preceding year.

Trade in Burma and Indian tobacco—Rangoon—Unmanufactured tobacco.—Imports from India declined from 14,898,052 lbs., valued at Rs. 34.70 lakhs to 9,141,290 lbs., and Rs. 23.70 lakhs. On the other hand the exports to India advanced from 2,212,455 lbs., valued at Rs. 2.94 lakhs to 12,696,419 lbs. and Rs. 16.24 lakhs, the bulk of which went to Bengal. Exports of the *Burma leaf* to foreign countries also expanded by nearly one million pounds to eleven million pounds, valued at Rs. 11.93 lakhs. France's share fell from 4,583,631 lbs. to 1,746,173 lbs., while Hongkong took 7,705,431 lbs. against 3,663,770 lbs.

Cigars.—Imports from India, chiefly from Madras, fell from 417,760 lbs. and Rs. 1.24 lakhs to 383,340 lbs. and Rs. 1.22 lakhs, whereas exports to India and foreign countries advanced from 177,362 lbs. and Rs. 1.65 lakhs to 252,769 lbs. and Rs. 2.24 lakhs.

Cigarettes.—The quantity and value imported from India were 55,000 lbs. and Rs. 1.56 lakhs or more than double the previous year's figures.

Moulmein—Unmanufactured.—The imports from Bengal and Madras were about 4 million pounds, valued at Rs. 12.95 lakhs, a decline of 500,000 lbs. as compared with the previous year.

Cigars.—The exports to the Straits amounted to 564,655 lbs. valued at Rs. 6.40 lakhs, about the same as in 1911-12.

22. Mineral Oils.—The largest item under this head was *fuel oil* from Dutch Borneo imported by one of the local refineries. Imports amounted to 6,604,438 gallons valued at Rs. 6.51 lakhs, a fall of over one million gallons as compared with the previous year. Imports of *kerosene* from the United States again fell off, the quantity received being 862,620 gallons worth Rs. 4.43 lakhs. There has been a steady decline since 1907-08 attributed partly to greater consumption of locally refined oil and partly to the extended use of electricity in Rangoon. It is satisfactory to note that *white oil*, a highly refined mineral oil, used for the adulteration of vegetable oils, fell from about 400,000 gallons to 232,000 gallons. About 250,000 gallons of *crude oil* from Persia were received for experimental treatment at one of the local refineries.

23. Miscellaneous.—The total imports of *coal* into Rangoon advanced from 365,302 tons to 477,720 tons, of which quantity 434,381 tons came from Bengal and 890 tons from elsewhere in India. Foreign imports advanced from 14,892 tons to 42,449 tons: this was due to the large quantities of Japanese coal (31,553 tons) used to fill up vacant hold space in steamers from Japan, which owing to the freight war had far more accommodation than cargo to stow in it. Imports of British coal declined.

Cement and asphalt advanced by 2½ lakhs; this is mainly due to the large scheme for reconstructing the Rangoon roads which has been taken in hand. The operations of the Burma Chemical Industries, Limited, led to a further marked decline in imports of *sulphuric acid*, which fell from 26,742 cwts. to 15,258 cwts., though a reference to the figures for mineral oil exports will show that consumption in the refineries must have increased; there was naturally a corresponding increase in the imports of *raw sulphur* by the same firm.

Matches rose by nearly 4½ lakhs to Rs. 17.39 lakhs, mostly Japanese, and the absurdly cheap freights for shipment from Japan led to this market being supplied from that country direct and not as formerly from stocks in Straits ports. *Seap* advanced by over 4 lakhs to Rs. 17.15 lakhs, mainly under *household and laundry soap* from the United Kingdom. Imports of *tea* from India rose by 342,000 lbs. to 1,024,490 lbs., while 214,807 lbs., mostly of a very inferior quality, came from China.

Under the heading *arms, ammunition, etc.*, there was a general rise, but this was most marked in the case of *blasting powder* of which 82,000 lbs. were imported from the United Kingdom. 8,263 *air guns* and *air rifles* worth Rs. 1.78 lakhs were passed as 'toys' against 4,887 in the previous year: of these at least 5,784 worth Rs. 1.73 lakhs were of the powerful types the trade in which was abruptly stopped in November 1912 by the issue of a notification prescribing a test under which these types have almost invariably been adjudged to be 'arms'.

Imports of *motor cars* and *motor cycles* (including parts thereof) rose in value by 66 per cent., the number of vehicles being 227. The popularity of the cheap American car led to an improvement in the share of this trade supplied by the United States from 7 per cent. to 20 per cent. of the whole imports. The imports of *cycles* were normal.

Imports of *sewing machines* advanced from 7,238 to 11,540, the bulk consigned from the United Kingdom. *Typewriters* and *talking machines* also improved. There was a great improvement in imports of *cinematograph films*, Burma taking its part in the world wide vogue for this amusement. Most of the films were re-exported after exhibition.

Cutlery imported from the United Kingdom rose from Rs. 1.15 lakhs to Rs. 1.44 lakhs, but Germany has now taken first place in this trade, having sent Rs. 1.92 lakhs' worth as against Rs. .84 lakh in the previous year. Burma prefers the cheap if inferior article and business has been so good in Sheffield that manufacturers declined to touch any but first class lines.

Nearly 600,000 *umbrellas* were imported from abroad, valued at Rs. 5.97 lakhs, while imports of the Indian made article numbered over 900,000 with a value of Rs. 7.34 lakhs. The umbrella of Indian manufacture has been improving its position of late years at the expense of the English article.

The imports of *gunny bags* from Bengal to the various ports in Burma advanced from 33 millions to 37½ millions worth Rs. 124.81 lakhs; this directly reflects the boom in exports of rice and other bagged produce.

EXPORTS.

24. The following table gives the value of the principal articles of Indian produce and manufacture in the export trade of Rangoon with foreign countries and shows their comparative importance:—

Articles.	Average value for the five year ending 1908-09.	1909-10.	1910-11.	1911-12.	1912-13.	Percentage of proportion to total merchandise exported.
	Rs. Lakhs.	Rs. Lakhs.	Rs. Lakhs.	Rs. Lakhs.	Rs. Lakhs.	
Rice, husked and unhusked	9,38.88	8,32.11	12,52.83	15,65.87	18,04.28	75.45
Rubber and pollard	61.77	62.03	63.69	65.67	64.55	8.98
Wood and timber	43.51	46.45	71.49	61.60	78.88	8.89
Hides and skins (raw) (a)	40.13	42.62	60.75	68.88	61.66	8.04
Paraffin wax	12.81	16.44	60.07	48.36	66.91	8.66
Cotton (raw)	25.92	46.04	24.79	66.60	42.46	2.00

(a) Includes the figures of *cuttings of hides and skins (raw)* from 1st April 1913.

Articles.	Average value for the five years ending 1908-09.	1909-10.	1910-11.	1911-12.	1912-13.	Percentage of proportion to total merchandise exported.
	Rs. Lakhs.	Rs. Lakhs.	Rs. Lakhs.	Rs. Lakhs.	Rs. Lakhs.	
Grain, pulse and flour (excluding rice)	19.71	30.94	30.85	31.52	27.64	1.30
Oil - Mineral	7.45	8.88	4.65	13.83	20.55	.97
Ground-nuts	10.30	6.37	7.84	8.70	19.81	.92
Lead, pig	.06	13.80	28.46	28.45	18.48	.87
Oil cakes	4.00	14.66	9.78	18.58	17.61	.83
Candles of all kinds	13.40	12.40	13.04	14.49	16.73	.78
Rubber (raw)	8.41	1.64	8.81	8.75	15.66	.72
Tobacco	6.60	3.22	3.40	10.67	13.89	.68
Cutch and gambier	11.81	6.47	16.13	12.42	10.19	.48
Metals, unenumerated	.01	.92	1.85	6.71	7.01	.33
Ores, unenumerated (a)	...	...	...	...	...	.29
Articles (not specified) exported by post (b)	3.95	6.98	7.11	5.88	6.14	
Lac	1.03	.18	1.07	2.59	3.10	.15
Spices	2.19	1.50	2.10	2.31	2.98	.14
Jadestone	8.49	10.72	8.70	2.86	2.31	.11
Horn, etc., and horn meal	.96	1.27	1.73	.93	1.73	.08
Fish	1.44	1.41	1.44	1.48	1.46	.07
Provisions	.60	1.43	.88	1.33	.53	.03
Cotton seed	1.09	6.24	.39	2.02	.22	.01
Precious stones and pearls, unset	6.85	...	...	...	...	...
Other articles	...	7.14	7.40	10.12	9.99	.47
Total, Indian Produce	12,24.80	12,00.24	16,65.02	20,28.92	21,26.22	100.00
Total, Re-exports	5.11	6.59	6.75	6.00	8.22	...
Total, Merchandise	12,29.91	12,06.83	16,71.77	20,34.92	21,34.44	...
Treasure—						
Gold	1.92	.66	.51	1.36	.03	...
Silver	.80	.77	2.37	1.33	.30	...
Total, Treasure	2.72	1.43	2.88	2.74	.33	...
GRAND TOTAL, EXPORTS	12,32.63	12,08.26	16,74.65	20,37.66	21,34.77	...

(a) Separately recorded from 1st April 1912.

(b) Separately recorded from 1st April 1908 (average for three years).

The following table shows the comparative importance of the principal articles of Indian produce and manufacture exported coastwise from Rangoon.

Articles.	Average for the five years ending 1908-09.	1909-10.	1910-11.	1911-12.	1912-13.	Percentage of proportion to total merchandise exported.
	Rs. Lakhs.	Rs. Lakhs.	Rs. Lakhs.	Rs. Lakhs.	Rs. Lakhs.	
Mineral oils, excluding paraffin-wax	2,65.74	3,13.24	3,83.29	8,61.83	4,04.26	49.81
Rice, husked and unhusked	5,13.25	7,66.89	3,91.15	1,06.34	1,49.41	36.00
Wood, and manufactures of	55.41	76.20	81.97	91.18	97.45	10.43
Cotton (raw)	6.49	8.51	16.99	30.16	45.04	4.83
Cotton manufactures, including twi t and yarn	39.11	56.63	85.98	41.42	44.24	4.74
Tobacco	5.17	6.51	4.87	5.26	14.89	2.02
Grain and pulse (excluding rice)	22.91	37.04	88.41	12.21	13.16	1.95
Candies*	8.38	9.93	14.55	11.83	13.95	1.49
Metals	10.78	8.75	11.01	12.65	13.90	1.49
Provisions	7.23	8.14	8.93	10.28	11.89	1.27
Apparel (including drapery, etc.)	9.16	7.40	9.37	10.00	11.89	1.27
Jute, manufactures of	4.44	4.23	3.26	4.23	10.12	1.08
Sugar	6.73	7.60	9.74	8.17	8.91	.95
Hardware and cutlery	4.95	6.12	7.67	7.93	7.59	.85
Seeds (excluding groundnuts)	.61	1.28	1.59	3.36	6.28	.67
Silk, and manufactures of	5.28	5.35	6.87	3.44	6.07	.65
Hides and skins	4.04	5.10	9.47	8.34	5.51	.59
Cutch	3.10	1.97	5.08	5.01	4.86	.49
Liquors	3.79	3.89	4.09	4.23	4.08	.43
Fruits and vegetables	1.03	1.29	1.29	3.11	3.79	.41
Oils, vegetable, not essential	2.01	2.35	1.63	2.59	3.60	.39
Spices	5.60	5.61	4.23	3.60	8.55	.88
Machinery and millwork	2.32	2.16	1.31	3.82	2.39	.25
Earthenware and porcelain	1.23	1.47	1.69	2.07	2.37	.26
Carriages and carts, etc.	.56	.69	1.47	1.95	2.38	.25
Lac	10.63	2.39	6.88	.38	2.21	.24
Paraffin wax	1.33	1.16	2.28	2.85	2.21	.24
Umbrellas, including parasols, etc.	1.67	1.50	1.43	1.57	1.72	.18
Groundnuts	.76	7.34	.60	.65	1.53	.16
Glass and glassware	1.52	1.21	1.25	1.49	1.47	.16
Railway plant and rolling-stock	1.03	.95	.87	1.08	1.33	.14
Animals, living	1.02	1.03	1.03	1.13	1.20	.13
All other articles	14.00	17.32	18.30	19.23	2.44	2.19
Total Merchandise	10,23.55	13,62.31	10,88.00	7,93.94	9,33.65	100.00

* Separately enumerated from April 1905 (average shown for four years).

25. Rice and Paddy.—The following table exhibits the combined exports of all ports in Burma. Of the total quantity shipped, Rangoon's share was about 1,575,000 tons. This was equivalent to 67 per cent. or nearly 5 per cent. less than in the preceding year. Bassein improved its contribution to nearly 350,000 tons or 14 per cent. against 11 per cent. in 1911-12, and Moulmein to nearly 200,000 tons, or 8 per cent. against 5 per cent. in 1911-12. Exports from

Akyab on the other hand declined : the drop was confined to shipments to India, which country required little assistance from Burma during the year.

	1908-09.		1909-10.		1910-11.		1911-12.		1912-13.	
	Tons.	Rs. Lakhs.	Tons.	Rs. Lakhs.	Tons.	Rs. Lakhs.	Tons.	Rs. Lakhs.	Tons.	Rs. Lakhs.
Foreign Trade.										
RICE IN THE HUSK (PADDY) ...	19,886	12.03	22,824	12.11	11,423	7.37	17,348	12.18	13,626	9.44
RICE NOT IN THE HUSK—										
British Empire—										
To United Kingdom ...	117,893	1,05.15	117,173	91.24	153,010	1,25.72	109,133	1,06.47	112,231	1,49.66
„ Ceylon ...	13,104	14.99	26,933	81.43	35,104	40.99	21,081	21.63	19,838	13.92
„ Straits Settlements ...	161,213	1,45.47	200,456	1,68.01	259,304	2,56.86	343,052	3,91.60	393,262	4,67.41
„ Hongkong ...	1,394	.74	4,905	2.44	11,361	9.21	9,107	7.63	11,230	19.95
„ Africa ...	34,483	37.23	23,613	27.40	26,429	35.71	28,143	35.65	16,170	10.88
„ Australasia ...	17,385	14.73	11,420	11.00	21,119	17.74	27,157	26.56	33,910	(a) 34.61
„ Other British Possessions ...	1,020	1.00	403	.56	406	.54	6,955	3.94	893	.90
Foreign Countries—										
To Sweden ...	9,551	7.57	5,000	4.62	17,054	12.57	3,335	3.22	11,121	14.03
„ Germany ...	217,329	2,05.35	324,530	2,65.65	311,290	2,69.16	809,408	3,17.32	834,453	3,71.02
„ Holland ...	155,876	1,24.45	201,237	1,39.00	237,901	1,88.67	127,761	2,05.55	145,320	1,50.75
„ Belgium ...	59,993	42.31	35,734	26.34	37,217	24.99	17,880	16.05	48,063	60.26
„ France ...	5,764	4.92	10,759	8.00	10,607	10.05	9,871	9.18	4,645	6.03
„ Austria-Hungary ...	121,883	1,08.98	185,237	1,48.35	163,351	1,47.59	160,231	1,55.20	156,164	1,63.15
„ Roumania ...	9,200	7.89	15,519	10.94	13,798	13.78	14,249	12.88	20,369	21.23
„ Other countries in Europe ...	6,023	4.75	30,131	21.78	5,511	4.30	10,923	8.95	5,687	6.23
„ Turkey, Asiatic ...	...	...	235	.20	6,601	6.72	63,147	57.27	31,942	36.54
„ Sumatra ...	10,314	9.90	18,013	16.13	12,948	12.58	9,468	10.06	5,561	6.11
„ Java ...	10,017	9.64	103,063	87.32	252,071	2,43.34	277,410	3,20.93	159,043	1,85.76
„ Celebes and other Islands ...	821	.76	2,373	2.02	4,112	3.77	7,343	6.83	7,343	8.22
„ Philippines, etc. ...	...	...	3,373	3.88	9,006	7.93	19,015	21.99	26,068	31.95
„ China, etc. ...	1,125	.80	1,757	1.31	23,658	20.71	21,420	21.00	12,627	13.73
„ Japan ...	20,840	21.79	13,013	10.36	61,609	55.63	140,914	1,70.13	211,228	2,71.71
„ Egypt ...	9,594	95.74	77,639	72.13	70,519	64.89	27,033	23.36	184,460	(b) 1,85.13
„ Africa ...	8,575	8.53	11,139	10.81	12,322	11.79	37,640	42.53	20,239	20.49
„ South America ...	19,769	18.99	16,839	16.83	29,127	24.45	17,121	15.62	16,668	(c) 16.06
„ Other Foreign Countries ...	165	.13	180	.20	76	.09	295	.40	200	.20
Total ...	1,076,070	9,89.65	1,452,039	11,99.66	1,823,158	16,34.87	1,912,587	20,19.95	2,048,089	22,75.60
Total Paddy and Rice (Foreign Trade).	1,091,956	10,01.68	1,474,863	12,12.07	1,844,581	16,32.24	1,929,935	20,32.13	2,061,715	22,84.94
Indian Trade (excluding Burma).										
RICE IN THE HUSK (PADDY)—										
To Indian Ports ...	367,960	2,83.94	443,228	3,21.10	171,675	1,13.42	103,511	75.31	76,044	57.08
RICE NOT IN THE HUSK—										
To Bengal ...	408,877	4,80.70	221,386	2,67.51	67,366	75.77	3,921	4.17	16,035	19.14
„ Bombay ...	243,055	2,96.75	202,650	2,47.91	190,298	2,26.00	103,064	1,12.13	119,800	1,45.78
„ Sind, Karachi ...	91	.10	...	...	...	...	...	...	...	...
„ Madras ...	185,028	1,42.10	155,936	1,56.52	115,523	1,09.37	32,599	32.37	53,287	56.63
„ Indian Ports not British ...	1,158	1.83	12,084	16.16	5,935	7.05	1,568	1.40	509	.69
Total Rice exports to India ...	739,209	9,20.93	595,056	6,88.10	373,532	4,18.19	141,142	1,50.07	190,211	2,21.16
Total Paddy and Rice exports to India (excluding Burma ports).	1,157,169	12,04.92	1,038,344	10,12.20	550,237	5,33.61	214,653	2,25.38	266,276	2,73.26
GRAND TOTAL, PADDY AND RICE EXPORTS TO FOREIGN AND INDIAN PORTS. (EXCLUDING BURMA PORTS).	2,252,125	22,06.60	2,513,117	22,24.27	2,394,818	21,68.56	2,174,583	22,57.51	2,327,990	25,63.23

(a) Includes shipped to Queensland for orders ... Tons 6,600 = Rs. 7.06 lakhs.

(b) Includes shipped to Port Said for orders ... „ 159,900 = „ 158.97 „

(c) Includes shipped to Chile for orders ... „ 1,750 = „ 1.75 „

The lack of coincidence between the financial year and the trade season is more than usually unfortunate in the present case, since the period covered by this report embraces parts of two seasons in which conditions were especially divergent. At the beginning of April 1912 the price of paddy was Rs. 145 per hundred baskets (of 46 lbs. each) and the price of rice (large mills, special Straits quality) about Rs. 300 per hundred baskets (of 75 lbs. each). The course of affairs during this month did not give any indication of the remarkable events which were to occur in the next three months. The market for paddy opening at the beginning of May at Rs. 150 advanced to Rs. 190 in the course of the month and by the middle of July to Rs. 210. The reasons for this phenomenal rise in prices were firstly, over-estimation of the extent of the damage done by the untimely rains in January and consequent fear of shortage, secondly the strong demand from Far Eastern countries, in which the paddy crop had suffered severely from drought, or much so that exports from Manila, the Dutch Indies and the Straits were prohibited or restricted, and thirdly, the attempts of Chinese speculators in Rangoon to “bull” the market on account of the strength of the Far Eastern demand mentioned. The operations of these speculators on the white rice market, in which they pushed prices up to Rs. 555 by the end of July, naturally reacted on the paddy market. Cultivators were able to get their share of this advantage owing to the improvement that has been manifesting itself of late years in arrangements for storing paddy and holding it up in order to secure better prices. It is interesting in this connection to note that the exports of rice and paddy in the first three months of 1912 were under 41 per cent. of the total for the year, a smaller percentage than in any of the preceding

six years. The very high prices offered had however brought out most of the available supplies by the end of July, when the device occurred to some merchants of importing large quantities of Bengal paddy for milling here. Importations of Bengal paddy in such quantities were quite unprecedented, the total amount being 55,000 tons from Calcutta and 25,000 tons from Chittagong during July, August and September. Incidentally it may be mentioned that the new departure gave rise to an interesting dispute, some shippers claiming that millers could not fulfil contracts for the supply of standard Burma rice with rice milled in Rangoon from Bengal paddy: their complaints however were overruled as millers are completely masters of the situation in Rangoon. The addition of this large quantity of Bengal paddy to local supplies, combined with the facts that the "bull" speculators began to have difficulties in financing their operations and that a slackening in the demand from the Far East set in, led to a rapid decline in prices, which continued till the end of the season.

The new crop was of excellent all round quality and in quantity estimated to yield an exportable surplus of 2,620,000 tons against 2,425,000 tons for the previous season: at the same time, Saigon and Siam reported good crops and the Far Eastern demand which was responsible for the previous year's wonderful prices was likely to be considerably reduced. The result has been that paddy quotations declined from Rs. 142, at which the season opened, to Rs. 124, at the end of March 1913, while rice (big mills specials) fell in the same interval from Rs. 365 to Rs. 315. Fears were freely expressed that bad times were coming and that the large supplies combined with the slack demand would lead to a still further slump; but the course of events since the close of the financial year indicates that these fears may not be realised. The holding up of stocks in the jungle owing to superior godown accommodation has been renewed, and should Burma export anything like her available surplus during 1913, it will be found that the shipments of January to March amounted to less than 40 per cent. of the total for the year.

During the whole of the period under review (April 1912 to March 1913) shipments to India were comparatively small, slightly larger than in 1911-12, but considerably less than in any of the preceding six years. Of the total exports of 260,000 tons, rice and paddy, 120,000 tons went to Bombay which reshipped a considerable proportion to East African ports, duty being paid at Bombay. Should the rice-cess proposed to be levied for the sake of improving communications in Burma differentiate between coasting and foreign exports, in favour of the latter, it may well follow that these Bombay-East Africa consignments will in the future pay duty here and travel on a through bill of lading by transshipment at Bombay. Of foreign countries of destination, the Straits were as usual the best market. Shipments to the United Kingdom showed an increase of over 33,000 tons; but the biggest advance was in the trade with Japan, which took 100,000 tons more than in 1911-12, itself the best year since the abnormal demand caused by the Russo-Japanese war ceased; Japan advanced to fourth place, after the Straits, Germany and India.

The total exports of rice and paddy amounted to 2,328,000 tons. This figure has been surpassed in three previous years (1907-08, 1909-10 and 1910-11), but owing to the high prices the value of the trade in the year under review was higher than ever before.

Mention has been made of the proposal to impose a cess on rice exported from Burma, the proceeds to be devoted to improving communications in the province, a proposal which was much canvassed during the year. In view of the numerous protests made by persons engaged in the rice trade against the scheme, it may be of interest to recall the similar outcry made when the Imperial export duty was raised to its present level in 1867. The history of the rice-trade subsequent to that enhancement of duty was discussed at length in the Chief Commissioner's report on Trade and Customs for 1871-72, and he pointed out that so far from the export duty preventing Burma from competing with Saigon and Bangkok, those ports had been beaten out of the European market; and he regarded it as "fully established that the rice duty falls entirely upon the producer and if it were taken off tomorrow the shipper would not pay one anna less for the rice than he pays now" (Report for 1870-71).

26 Rice Bran.—Foreign exports for the whole province declined by 6 per cent. from 223,730 tons to 210,266 tons; but good prices prevailed and the value showed an actual increase by Rs. 4 lakhs to Rs. 94.5 lakhs. All the outports increased their shipments, Bassein in particular showing a remarkable increase from 3,380 tons in 1911-12 to 9,639 tons, by far the highest figure recorded for this port. This is in sympathy with the increase in Bassein's share of the rice trade alluded to above. The exports of bran from Rangoon declined by 21,953 tons to 191,125 tons. This phenomenon is explained by the following facts. Early in 1911 prices were low, and hence stocks were reserved and the portion of that (calendar) year's exports which went between April and December was especially large; in the early part of 1912, prices were very high and shipments before March were unusually heavy, leaving a smaller balance for the months April to December than in 1911, though the total exports for 1912 exceeded those of 1911 by 20,000 tons. Thus the financial year April 1911 to March 1912 covered two periods of abnormally heavy shipments; while the first nine months of 1912-13 perforce showed a reduction, and shipments in the first three months of 1913 showed a marked drop from the same part of 1912 owing to a very serious decline in prices, which returned to the 1911 level.

Exports to Indian ports were as usual negligible.

27.

Teak Wood.

Foreign Trade.	1908-09.		1909-10.		1910-11.		1911-12.		1912-13.	
	C. Tons.	Rs. Lakhs.	C. Tons.	Rs. Lakhs.	C. Tons.	Rs. Lakhs.	C. Tons.	Rs. Lakhs.	C. Tons.	Rs. Lakhs.
From Rangoon	21,363	32.61	29,965	45.79	42,357	70.59	40,777	61.36	49,954	77.21
„ Moulmein	4,262	5.77	4,124	6.63	7,533	11.81	5,290	7.85	8,656	13.06
Coasting Trade (To India).										
From Rangoon	73,962	63.06	82,180	71.31	89,700	77.25	98,472	85.66	94,889	84.99
„ Moulmein	43,410	40.64	46,331	42.03	46,853	43.16	31,986	30.07	39,212	38.56
GRAND TOTAL (FOREIGN AND INDIA).										
From Rangoon	91,425	95.67	112,165	117.10	133,057	147.84	139,249	147.02	144,853	162.20
„ Moulmein	47,722	46.31	50,755	48.66	53,886	51.97	37,276	37.92	47,868	47.62

The combined foreign and coasting exports from the Province amounted to 192,721 cubic tons of which 58,610 cubic tons went to foreign countries and 134,111 cubic tons to India. The United Kingdom was the best foreign customer taking 36,500 cubic tons, followed by Germany with 6,800 cubic tons. The supply in the United Kingdom was at no time during 1912 in excess of the demand and as stocks were small prices have steadily gone up and a further rise in prices is anticipated in view of the general good trade prospects. It is stated that stocks in India have been heavily reduced and the actual consumption was probably greater than in any previous year. The exports from Rangoon were the highest on record and Moulmein also exported 10,600 cubic tons more than in 1911-12.

Wood—other timber.—It is satisfactory to notice that attention is being turned to timber other than teak and that the foreign and coasting exports from Rangoon, principally of *Eng* and *Pyinkado*, advanced from 5,279 cubic tons and Rs. 3.44 lakhs to 15,811 cubic tons and Rs. 11.25 lakhs; 1,166 cubic tons went to the United Kingdom and the balance to India. The foreign exports from Moulmein were negligible, but that place supplied India with 17,000 tons of timber valued at Rs. 10 lakhs. This has been described in the shipping bills as "*jungle-wood*," a term usually applied by traders and some Forest Officers to woods other than teak. With the steady appreciation within recent years in the value of all descriptions of timber, there appears to be a great future for the forests of Burma when more attention is devoted to "*jungle-woods*."

28.

Mineral Oils.

Foreign Trade—	1908-09.		1909-10.		1910-11.		1911-12.		1912-13.	
	Gals.	Rs. Lakhs.	Gals.	Rs. Lakhs.	Gals.	Rs. Lakhs.	Gals.	Rs. Lakhs.	Gals.	Rs. Lakhs.
KEROSENE	232	...	785,932	3.93	391,853	1.96	32	...	96	...
OTHER SORTS *	1,828,801	1.78	3,846,320	4.73	2,165,111	2.59	14,806,740	13.82	21,484,786	21.55
Total, Mineral oils (Foreign Trade)	1,828,801	1.78	4,632,252	8.66	2,556,964	4.55	14,806,772	13.82	21,484,882	20.55
Coasting Trade—										
KEROSENE—	Gals.	Rs. Lakhs.	Gals.	Rs. Lakhs.	Gals.	Rs. Lakhs.	Gals.	Rs. Lakhs.	Gals.	Rs. Lakhs.
To Bengal	49,722,638	1.29.78	51,943,988	1.71.81	60,281,462	2.16.80	50,872,667	1.77.70	69,093,447	1.96.30
„ Bombay	10,616,457	34.19	10,844,103	36.24	16,062,807	61.84	16,221,991	65.62	18,413,917	59.62
„ Sind	2,917,514	9.50	3,141,619	10.06	3,126,624	11.79	4,484,436	15.44	4,955,125	16.87
„ Madras	10,726,496	31.56	14,787,361	43.31	14,365,165	49.84	16,267,776	60.08	23,804,374	71.05
Total Presidencies	61,883,106	2.08.03	80,716,111	2.68.36	94,628,788	3.37.77	87,837,709	3.04.69	103,266,863	3.48.84
To Provincial Ports	937,320	3.88	1,036,684	6.70	1,380,704	5.46	1,288,792	5.46	1,785,204	6.02
„ Marmagao	2,441,845	7.87	3,562,752	11.72	2,047,979	8.97	2,957,117	10.16	2,984,355	10.26
Total	68,261,770	2.19.78	85,895,467	2.86.78	98,617,421	3.52.19	92,083,678	3.20.31	107,496,302	3.59.13
OTHER SORTS *	8,244,061	18.28	4,772,771	26.46	4,734,983	30.89	6,114,210	41.33	6,609,987	44.92
Total, Mineral oils (Coasting Trade)	71,515,831	2.38.06	90,668,238	3.13.24	103,352,404	3.83.08	98,197,918	3.61.64	113,946,289	4.04.04
GRAND TOTAL, MINERAL OILS (FOREIGN AND COASTING TRADE).	73,374,632	2.39.84	95,300,460	3.22.10	105,969,379	3.87.13	113,064,690	3.75.46	125,431,121	4.24.59

* "Other Sorts" includes fuel oil, petrol, lubricating oil, etc.

The year was marked by continued progress, and extractions and exports were bigger than ever before. Yenangyaung is still by far the most important field, and the increased production is due to the successful drilling of deeper sands in that area. The Singu field was also active, but operations may be said to be still in the prospecting stage in other parts of Burma, though much work was done. The outturn of *crude petroleum* in the calendar year was 245,335,209 gallons, 23 million gallons more than in 1911 and 15 million more than in 1909, which previously held the record for production. Exports of mineral oils in the year 1912-13, as will be seen from the table, expanded by 22 million gallons or 20 per cent.; adding paraffin wax and candles, which are discussed below, the total value of the exports of *petroleum products* from Rangoon was Rs. 5,14.34 lakhs, sixty lakhs more than in 1911-12.

Kerosene oil.—Foreign exports were negligible, but India absorbed 106,251,098 gallons valued at Rs. 3,54.10 lakhs as against 90,794,886 gallons worth Rs. 3,14.85 lakhs, Bengal taking 55 per cent., Madras 20 per cent., and Bombay 17 per cent. of the total quantity. Bombay and Sind are the only Provinces which do not draw the bulk of their supplies from Burma.

Other kinds.—Foreign exports rose by 45 per cent. in volume and by 49 per cent. in value. They consisted mainly of *benzine* 19,535,576 gallons, largely to the United Kingdom, and 1,859,602 gallons *Navy fuel oil* to the United Kingdom. Of the total quantity exported, the United Kingdom absorbed 60 per cent., Holland 21 per cent., while 18 per cent. went to Port Said for orders and the final destination is not yet known.

29. Paraffin Wax.—The combined exports to India, and Foreign countries were 15 per cent. better in volume and 16 per cent. higher in value than in 1911-12. Exports to Foreign countries improved by 36,845 cwts. and Rs. 8'56 lakhs to 252,055 cwts. worth Rs. 56'91 lakhs. The United Kingdom was the best customer with 76,137 cwts., followed by the United States with 33,847 cwts., Japan with 26,674 cwts. and Australasia with 25,534 cwts. Shipments coastwise dwindled to 9,786 cwts. worth Rs. 2'21 lakhs.

30. Candles.—*Foreign and Coasting Trade.*—The local Oil Refineries continued to increase their output of *candles* and to extend their export business. The exports amounted to over 10½ million pounds valued at about Rs. 30 lakhs, an advance of one million pounds over the previous year. The best customers were India, China, Indo-China, Straits Settlements, Ceylon and Australasia. It is reasonable to suppose that Burma herself consumed more candles of local manufacture, since foreign imports continued to decline.

31. Hides and Skins.—The following table gives exports from *Rangoon* only and to *foreign ports* only. Shipments of *hides and skins* to India were valued at Rs. 5'37 lakhs, while shipments from outports were insignificant.

	1908-09.		1909-10.		1910-11.		1911-12.		1912-13.	
	Cwt. No.	Rs. Lakhs.	Cwt. No.	Rs. Lakhs.	Cwt. No.	Rs. Lakhs.	Cwt. No.	Rs. Lakhs.	Cwt. No.	Rs. Lakhs.
Raw Hides ...	71,418 681,929	28'00	95,351 741,567	42'36	105,819 786,971	56'73	121,638 905,996	58'29	121,916 892,876	63'56
RAW SKINS ...	192 7,579	1'18	378 17,009	2'6	17 1,074	0'03	26 1,861	0'04	1,013 67,939	0'97
TOTAL OF HIDES (Cwt. AND SKINS, RAW) ...	71,610 689,508	28'18	95,729 758,576	42'36	105,836 788,045	56'75	121,664 910,859	58'33	122,929 890,815	64'53

This business has done very well in the year under review. Values advanced in the London market by at least twenty-five to thirty per cent. in the course of the year 1912, and reached a higher level than ever before, eclipsing the previous record of 1857. The world's supplies are decreasing and there is a strong universal demand for the material; and as stocks of leather were not accumulated during 1912, the position of the trade remained a strong one. This is one of the classes of goods for which values declared at the time of export are not always reliable, but the general hardening described above is reflected in our figures by an increase of 11 per cent. in the value of hides exported, though in quantity there was a slight decrease. Italy was as always the chief customer for *Burma raw hides*, her share being over one-fifth of the total. Hitherto Italy has been followed by Turkey in Asia, but the war in the Balkans has ruined this market, its share being diverted elsewhere; and in 1912-13 the second place is taken by the United Kingdom. Other countries which took three lakhs' worth or more were the United States, Germany, Turkey in Asia, France, Spain, Canada, Belgium and Holland (in the order given).

Cow-hides were valued at Rs. 50'37 lakhs and *buffalo-hides* at Rs. 13'16 lakhs. The overland arrivals of *raw hides* from Western China were valued approximately at Rs. 3'32 lakhs as against Rs. 2'14 lakhs in the preceding year. The chief market for *raw skins* is in the Madras Presidency, but there was a satisfactory improvement in foreign exports, the bulk being *goat skins* taken by the United Kingdom.

32.

Cotton (Raw).

	1908-09.		1909-10.		1910-11.		1911-12.		1912-13.	
	Cwts.	Rs. Lakhs.	Cwts.	Rs. Lakhs.	Cwts.	Rs. Lakhs.	Cwts.	Rs. Lakhs.	Cwts.	Rs. Lakhs.
To United Kingdom ...	66,867	18'90	99,360	33'83	38,748	14'99	61,271	24'39	60,906	18'73
" Straits ...	...	...	...	...	5	...	8,392	1'17	1,046	0'40
" Hongkong ...	...	...	1,048	0'80	...	...	...	...	...	...
" Germany ...	3,609	1'02	7,532	2'26	5,295	2'20	3,952	1'57	...	...
" Austria-Hungary ...	...	...	3,622	1'19	2,113	1'03	414	0'16	...	...
" Belgium ...	10,970	3'08	2,585	0'72	1,418	0'64	2,428	0'93	1,342	0'50
" France ...	3,629	1'04	802	0'23	...	...	...	...	...	...
" Italy ...	9,999	2'83	8,211	2'56	1,729	0'82	...	...	...	...
" Japan ...	2,794	0'80	9,828	2'91	6,967	3'17	23,298	8'09	68,449	22'87
" Spain ...	2,199	0'70	4,701	1'52	1,962	0'90	...	...	...	...
" Other countries ...	4,170	1'19	1,401	0'52	1,941	1'04	441	0'30	...	...
Total Foreign Trade ...	101,527	29'56	134,213	46'61	105,502	34'79	95,136	36'60	118,764	42'51
Total Coasting Trade ...	31,216	8'77	32,117	8'72	89,619	10'29	81,668	30'51	133,087	45'16
GRAND TOTAL ...	135,743	38'33	171,330	55'33	195,121	45'08	176,804	67'11	251,851	87'67

Considerable attention is being devoted to the cultivation of *cotton* in Burma, and as the crop always finds a ready sale, further expansion may be expected. During 1912 the area under *cotton* was computed at 227,000 acres, an increase of 22 per cent. over the 1911 figures. The outturn was excellent and the exports exceeded the previous year's record figures by 39 per cent. in volume and by 31 per cent. in value. The United Kingdom and Japan shared the foreign exports, and Calcutta absorbed the bulk of the coasting trade. The rapid advance in shipments to India is noteworthy.

33. Cotton Seeds.—Exports advanced from 137,681 cwts. valued at Rs. 4'53 lakhs to 202,474 cwts. and Rs. 5'57 lakhs. Bombay took the bulk of this produce, the United Kingdom which last year took nearly half the outturn having almost dropped out of the market. A considerable amount of this product was pressed in Burma, as *cottonseed oilcake* to the extent of 62,191 cwts. worth Rs. 1'99 lakhs was shipped to the United Kingdom.

34. Groundnuts.—A large proportion of the 1911 crop was held over till the early part of the rains of 1912, when a good demand sprang up; and as excellent prices were still obtainable when the 1912 crop was gathered, heavy shipments were at once renewed; hence the year under review covered the dealings in the greater part of two crops. The area under this seed was larger by 38 per cent. than in 1911, and the season was successful to cultivators. It is not surprising therefore to find that Burma's total exports amounted to 302,590 cwts., a figure which exceeds by 25 per cent. or more those of the best previous years (1906-07, 1907-08 and 1909-10), and which is five times as great as the phenomenally low record of 1911-12. The bulk of the shipments went to Hongkong, freight rates to Europe being extortionately high. But not only did the Province export unusually large quantities of the seed; it is clear too that her supplies were enough to meet internal demand for oil making purposes as well, with practically no assistance from India such as was invoked last year, when 96,730 cwts. were imported; while that this internal consumption was better than before is indicated by the fact that the exports of the by-product, *groundnut oil-cake*, improved very considerably, *viz.*, to 511,589 cwts. valued at Rs. 14'43 lakhs, and that local shipments of the oil to provincial ports also advanced from 82,435 gallons to 132,725 gallons. At the same time, imports of the oil from Indian ports declined from 1,964,159 gallons to about half that figure.

35. Beans.—This trade, which during the two preceding years showed some signs of reviving, has again relapsed and exports to foreign countries amounted to 17,446 tons valued at Rs. 16'55 lakhs, as against 24,647 tons in the previous year. Some recovery appears in exports to Japan which was the biggest customer in the two years 1903-04 and 1904-05, but which then almost dropped out of the market for five years. In the year under review, however, Japan took the largest share, *viz.*, 7,713 tons. The European market was poor, the United Kingdom taking less than half what it took in 1911-12, while shipments to other European countries were remarkably small. The best figures for this trade were those of 1904-05 and the following year; in 1904-05 Japan, France and United Kingdom were the best customers, in this order, while in 1905-06, with Japan out of the market, the order was United Kingdom, France, Belgium. There is no doubt that exaggerated accounts of the presence of prussic (cyanhydric) acid in the beans have seriously prejudiced the trade with European countries; and this has gone so far that in France by a decree published in the *Journal Officiel* of the 29th June 1912, the Government have prohibited the sale for food of beans and peas from Burma. Thus what was once our best market has been closed to us entirely. The matter has been under the notice of the Agricultural Department and an effort is to be made to induce growers to cultivate a better class of bean, but even if this succeeds, it will probably take some time to live down the bad name which the *Burma bean* now has in European markets, and which precludes it from sharing in the general prosperity of the bean trade at the present time.

Exports of beans to Indian ports were normal, amounting to 7,440 tons valued at Rs. 5'78 lakhs. The bulk of these shipments were to ports in the Madras Presidency.

36. Rubber.—The exports from the Province advanced from 310,240 lbs. valued at Rs. 9'20 lakhs to 526,176 lbs. and Rs. 16'60 lakhs. Approximately 35,000 acres have been planted with Para rubber in various parts of the Province, but principally in the Tenasserim Division. The bulk of the planted area has not yet arrived at the producing stage, but excellent results are being obtained from the two oldest plantations, one in the Mergui District and the other at Shwegyin in the Toungoo District.

37. Cutch.—Exports to India and Foreign countries fell from 5,342 tons to 4,547 tons with a value of Rs. 14'70 lakhs. Prices were steady throughout the year on the same level as during the previous year. Within the last ten years this trade has declined considerably; in earlier years the export from Burma has been as high as 15,000 tons. The competition with the synthetic article has no doubt affected the trade, but it would be interesting to ascertain whether the export royalty of Rs. 4 per 100 viss (about Rs. 25 a ton), which has been levied since 1st October 1904, has in any way interfered with the export trade. The United Kingdom took nearly two-thirds of the exports for the year and the remaining third went to Calcutta.

38. Lac.—Exports in the foreign trade, principally *seed lac* and *shellac* to the United States, advanced from 6,091 cwts. valued at Rs. 2'59 lakhs to 7,634 cwts. and Rs. 3'10 lakhs. Shipments to India, mostly *sticklac*, amounted to 10,805 cwts. valued at Rs. 2'21 lakhs against 1,780 cwts. and Rs. 0'33 lakh in the previous year; this increase is attributed to the substantial reduction in the rate of royalty leviable on export. For the five years ending 1907-08 prior to the imposition of the export royalty, the average value of exports to India was Rs. 12'52 lakhs; the royalty appears to have seriously interfered with the trade. It will be interesting to see whether the revival now begun on account of the reduction of royalty will have any considerable development in the next few years. The arrivals of *sticklac* overland from Western China and the Shan States were approximately 691 cwts. and 15,793 cwts. respectively as against 611 cwts. and 7,858 cwts. in 1911-12.

39. Lead, pig.—The quantity exported in 1910-11 was approximately 13,250 tons valued at Rs. 28'46 lakhs, last year the exports fell to 10,100 tons with the same value, and during the year under review the quantity and value was only 7,250 tons and Rs. 18'48 lakhs. The decline last year was attributed to the stoppage of work while the smelters were being transferred from Mandalay to Namtu. The reason for the further decline has not been ascertained, but it is probable that operations in the Bawdwin mines have become more difficult with the working out of the surface lodes.

It should be pointed out that steamers frequently arrive at Burma ports from places in India in ballast seeking cargo and proceed after loading direct to foreign ports: in such cases they appear as entered in the 'coasting' trade and cleared in the 'foreign' trade. This explains some apparent discrepancies between entries and clearances in the above table. The remarkable figures for coasting vessels at Akyab are attributable to a peculiarity in the registration of native craft; of the total figures for that port, *viz.*, 953 entered and 777 cleared, only 251 and 257 respectively were steamers, but these represented nine-tenths of the total tonnage.

There was a noticeable advance in the number of vessels flying foreign colours which entered and cleared. The number of Japanese vessels entering and clearing at Rangoon from or to foreign ports exactly doubled itself, advancing from 61 (total 154,239 tons burden) to 122 (total 320,617 tons burden). This is explained partly by the establishment late in the previous year of a regular line of Japanese steamers plying between Far Eastern ports and Calcutta, *via* Rangoon: and partly by the large number of Japanese 'tramps' which came to carry the enormous exports of Burma rice to Japan. There was a decline in the number and tonnage of British shipping in the foreign trade at Rangoon, due to the diversion of the exports of rice from European to Eastern destinations. Of the combined entries and clearances at Rangoon from or to foreign ports, 493 vessels with a burden of 1,508,112 tons flew British colours, while 240 vessels with a burden of 624,438 tons sailed under foreign flags; 122 of these latter were Japanese, 50 German, 26 Dutch, 18 Austrian, 17 Russian, 4 Norwegian, 2 American and 1 Swedish. A proposal to establish a regular service of steamers between Swedish and Norwegian ports and Rangoon and Calcutta has recently been reported to the Chamber of Commerce.

In view of what was said earlier in this report regarding the tendency for the rice trade to be diverted from Rangoon, it is interesting to note that in the foreign trade combined entries and clearances in Rangoon declined by 4 in number, while in the outports they advanced by 83. It is true that owing to the larger size of vessels the total tonnage at Rangoon showed an increase in spite of the smaller number of vessels, but while this increase was 7 per cent. of the previous year's total, the figures for the outports show an increase in tonnage of 32 per cent.

With regard to vessels in the coasting trade the three principal features are, the renewal of the British India Steam Navigation Company's fleet, five new steamers taking the place of those which have become obsolete; the improvement of communications between Rangoon and ports on the Arakan and Tenasserim coasts; and the entry of Japanese vessels into the Rangoon-Calcutta trade, leading to a keen competition with the already existing services. The total number of coasting vessels entered and cleared at Rangoon was 2,355 (tonnage 3,436,273); of these 2,203 sailed under British or British Indian colours, 53 under Japanese and 99 under other foreign colours.

Freights.—At the beginning of the official year the freight market opened firm and continued so up to January 1913 from which point freights have come down to a somewhat lower level, although at the close of the year the market could in no way be described as weak. The recent drop in freights may in a measure be attributed to European Continental importers holding back in view of the uncertainty of the outcome of affairs in the Balkan States.

Rice charters to London, for which in January-February as high a rate as 32s. 6d. was paid, were easier at the end of March.

A comparison of the open chartered rates of freight in March of each year is given below:—

	£	s.	d.
1910	...	...	...
1911	...	...	...
1912	...	...	...
1913	...	...	...

BHAMO.

46. Bonded Warehouse, Bhamo.—So far back as 1869 the attention of the Rangoon mercantile community was drawn to the possibilities of the trade between Bhamo and Western China. Bhamo was then described as "the mart to which the produce of the vast Provinces, which lie between the Irrawaddy and the Yangstekiang river, are brought for disposal." In November 1869 a party of merchants from Rangoon, with a small consignment of goods, visited Bhamo in the first steamer, the "Colonel Fyche," which proceeded so far up the river. In the Trade Report of British Burma for the year 1869-70 the future prospects of this trade route were considered to be very bright. The following extract from the abovementioned report is of interest today:—"The war between the Chinese and Panthays, which has been raging for a great number of years past, now appears to be dying out in the south-western portions of Yunnan, and if some peaceful arrangement can be made with the two Chinese leaders who are in the Shan States there will be little difficulty in resuscitating the trade which enriched the Golden Peninsula in the olden time." These hopes have not been realized as the country between Bhamo and Têngyüeh has never been properly administered and has always remained more or less in an unsettled state, and no attempt has ever been made to improve the road communication between the two places. The fact that the trade route has been kept open in the face of all difficulties and dangers is due to the hardy character of the Yunnanese muleteers who conduct the caravan traffic. With a view to encouraging the trade the Government of India in

1904 sanctioned a scheme for granting a drawback of seven-eighths of the import duty paid at Rangoon on goods exported *via* Bhamo to Têngyüeh, a large distributing centre in Western China. Since the establishment of the Warehouse, there has been little development of the trade. The total value of the registered trade which entered Western China by the Bhamo route was Rs. 38'13 lakhs in 1906-07 whereas in 1911-12 the value was only Rs. 42'95 lakhs. The value of the goods which passed through the Warehouse and on which drawback was paid amounted to Rs. 4'18 lakhs in 1906-07 and Rs. 4'80 lakhs in the year now under review. This state of affairs is not surprising when it is remembered that the French railway from Haiphong in Indo-China has been carried as far as Yunnanfu and that Tali-fu, a great distributing centre for Western Yunnan is equi-distant from Yunnan-fu and Têngyüeh. It is quite evident that the trade between Burma and Western China is not affected by the question of drawback; the trade can only be developed on large commercial lines by the improvement of communications.

During the year under review there was a revival of the re-export trade to Western China owing to the more settled condition of that country. The value of merchandise which passed through the Warehouse *en route* for Têngyüeh advanced from Rs. 3'73 lakhs to Rs. 4'80 lakhs, and the amount paid as drawback was Rs. 14,319 against Rs. 9,859. About one-third of the trade between Bhamo and Têngyüeh consists of *twist and yarn*, chiefly from India, *cotton piece-goods* are next in demand followed by *woollen goods*.

ADMINISTRATION.

47. The statement below shows in detail under the several heads the *Receipts and Disbursements* of the Rangoon Custom House for the year 1912-13 as compared with those for the year 1911-12.

Receipts.	1911-12.	1912-13.	Increase or decrease in 1912-13.	Disbursements.	1911-12.	1912-13.	Increase or decrease in 1912-13.
REVENUE.	Rs.	Rs.	Rs.	CUSTOMS BUDGETTED DISBURSEMENTS.	Rs.	Rs.	Rs.
Import duty on salt ...	18,09,021	16,71,790	1,37,231	Salaries of Gazetted Officers ...	51,938	58,298	6,360
Import duty on goods ...	68,28,571	73,70,194	5,41,623	Permanent establishment ...	3,02,925	3,25,154	22,228
Export duty ...	72,16,080	76,40,249	4,24,169	Temporary establishment ...	17,404	9,233	8,171
				Overtime and holiday allowances ...	78,548	84,241	5,693
				House allowances ...	20,321	20,931	610
				Travelling allowances ...	1,031	1,133	102
				Value of stores and equipment for boats ...	613	635	22
	1,59,54,272	1,71,82,277	12,28,005	Purchase of and repairs to boats ...	202	774	572
				Petty construction and repairs ...	5	...	...
Commission (7½ per cent.) on collections of "Little Besses" and "Minicoy" light-dues ...	673	442	231	Steam launch charges—			
Commission (1 per cent.) on collection of Straits light-dues ...	119	89	30	Salary of crew ...	7,721	7,111	610
Warehouse rent ...	226	207	19	Hire of launch and other charges ...	21,430	15,181	6,249
Overtime and holiday fees ...	76,059	68,991	7,068	Purchase of and repairs to scales and instruments ...	3,402	879	2,523
Receipts on account of Customs confiscations and penalties ...	5,523	23,001	17,478	Rewards to seizing officers ...	945	10,092	9,147
Transhipment fees ...	3,932	7,125	3,193	Rents, rates and taxes ...	2,538	12,659	10,121
Fees charged for services of Preventive officers and Salt peons ...	11,050	9,391	1,659	Contingencies ...	3,101	8,163	5,062
Other items ...	8,210	2,795	5,415				
					5,15,975	5,49,558	33,583
Total Revenue ...	1,60,52,061	1,72,94,818	12,42,757	Refunds of Salt duty ...	6,598	11,980	5,382
Total Disbursements ...	7,51,280	7,70,027	18,767	Drawback on goods re-exported ...	8,692	14,820	6,128
				Refunds of import duty ...	42,782	52,609	9,827
				Refunds of export duty ...	1,77,821	1,41,188	36,633
				Other refunds (Miscellaneous) ...	47	877	830
Net Revenue ...	1,58,00,804	1,65,24,791	7,23,987	Total Disbursements ...	7,51,280	7,70,027	18,767
MISCELLANEOUS COLLECTIONS NOT CREDITED TO CUSTOMS.				MISCELLANEOUS DISBURSEMENTS.			
Deposits ...	758	6,629	5,871	Repayments of deposits ...	620	4,190	3,570
Sunday labour, special fees ...	16,650	31,200	14,550	Payments out of Sunday labour, special fees ...	15,100	25,450	10,350
Sale-proceeds of Custom-House publications ...	15,960	14,539	1,421	Printing of Custom-House publications ...	13,490	14,500	1,010
Basses and Minicoy light-dues ...	8,295	7,921	374	Refunds of light-dues ...	4,111	1,684	2,427
Straits light-dues ...	11,798	8,789	3,009	Refunds of royalty on catch ...	4,111	1,684	2,427
Burma coast light-dues ...	2,40,901	2,56,635	15,734	Refunds of royalty on lac ...	1,063	388	675
Madras coast light-dues ...	6,786	4,829	1,957	Refunds of Cess on Tea ...	...	21	...
Royalty on exports of catch ...	1,31,977	1,11,161	20,816				
Royalty on exports of lac ...	8,724	2,415	6,309				
Cess on exports of tea ...	22	28	6				
Total ...	4,40,971	4,67,409	26,438	Total ...	36,769	47,878	11,109

Receipts.—The reasons for the rise and fall in revenue collections have been explained in the Report. The increase under *Customs confiscations and penalties* is due to heavy penalties imposed for attempts to smuggle birds' feathers. The decrease under *overtime and holiday fees* and increase under *transhipment fees* is due to trade fluctuations.

The increase under *deposits* is due to the duty realized on British Commercial Travellers' samples being credited under this head instead of to import duty as was done in previous years. The decrease in *Straits light dues* is due to the abolition of the tax with effect from the 1st

January 1913. Owing to reduction in the rate of *royalty* levied there was a big increase in the quantity of lac exported.

Disbursements.—The increase in the *permanent establishment* and the decrease in the *temporary establishment* are due to the reorganisation of the clerical establishment and consequent reduction of the temporary staff. The increase under *rewards* is due to the increased receipts under confiscations. The increase under *Rents, rates and taxes* is due to renting of building for accommodation of the Custom House and vacating the old Custom House building to be rebuilt.

48. Inspection.—The Custom Houses at Bassein, Tavoy and Mergui, and the bonded warehouse at Bhamo were inspected during the year.

49. Cases adjudged under the Sea Customs Act—Rangoon.—Apart from petty breaches of the landing and shipping rules and excluding cases under the Opium and Excise Acts and the Merchandise Marks Act which have been dealt with separately, there were 202 cases as compared with 261 in the previous year. These include 34 cases in which action was taken under section 32 of the Act, but exclude minor cases of undervaluation where amendments were allowed without penalty.

The amounts realized in penalties and extra duties were Rs. 20,016 and Rs. 4,985-10-0 respectively against Rs. 1,226-2-0 and Rs. 3,643-12-0 in the preceding year, and the amount realized from sale of confiscated goods amounted to Rs. 1,317-2-0 of which Rs. 764-10-0 was credited as duty. None of the cases of undervaluation reported during the year are deserving of special mention. There were 46 cases in which attempts were made to smuggle dutiable goods. The most important of these was one in which a passenger from the Straits attempted to smuggle a large quantity of *Chinese manufactured tobacco* and *Chinese medicine*. A heavy penalty was imposed and the goods were confiscated. The passenger however absconded and the goods were eventually sold and realised Rs. 1,180-10-0. Two shipments of *egret feathers* by post and one of *kingfishers' skins* were intercepted, and in the case of the feathers in which a European firm in Rangoon and a European individual in Mandalay were concerned, penalties amounting to Rs. 15,000 and Rs. 1,000 respectively were imposed and were paid.

A heavy penalty was also inflicted in addition to confiscation in a case in which a cask of *Carbide of Calcium* was imported from the Straits misdeclared as "Electric Clay".

Customs officers were successful in recovering two *revolvers* which were being smuggled into the country from the Straits.

A consignment of *biscuits* and *preserves* which was examined at the instance of the Collector, Rangoon, and found to contain 416½ ounces of *cocaine* was confiscated and sold after removal of the cocaine, which was forwarded to the Excise Department for disposal. The importers in this case could not be traced.

Subordinate Ports.—The number of cases dealt with and penalties imposed were as follows:—

Moulmein, 18 cases, Rs. 100.	Mergui, 3 cases, Rs. 13-8.
Akyab, 44 cases, Rs. 213.	Tavoy, 2 cases, Rs. 1-6.
Victoria Point, 3 cases, Rs. 210.	

In one of the cases at Moulmein a conviction was obtained under the Arms Act. At Victoria Point two cases of *tobacco smuggling* were detected. None of the above cases call for any special remarks.

50. Cases under the Opium and Excise Acts—Rangoon.—The number of seizures effected was 95 as against 107 in the previous year. The seizures comprised the following drugs:—

Opium	...	...	22,322.8 tolas.
Bhang	...	...	74.5 tolas.
Ganja	...	...	5,751.2 tolas.
Morphia	...	...	28.523 ozs.
Cocaine	...	...	741.5 ozs.
Poppy heads	...	...	5.75 lbs.

Convictions were obtained in 41 out of 46 cases in which arrests were made: one accused was still under trial at the end of the year and another absconded from jail. Rewards to the amount of Rs. 17,868-8-0 were paid to informers, Preventive officers and peons, including a reward of Rs. 4,000 for a seizure of 701 ounces of *Cocaine*, made during the previous year.

Two good seizures of *opium* were made by Preventive Officers posted to watch Calcutta mail boats on their way up the river: this appears to be a favourite method of smuggling this contraband. Most of the *cocaine* was seized on board vessels from China as the result of prolonged searching.

Subordinate Ports.—One case of illegal possession of 2½ tolas of *ganja* was detected at Moulmein and a conviction under the Excise Act obtained. At Akyab 834½ tolas of *ganja* and 868½ tolas of *opium* were seized, representing twelve cases, in nine of which convictions were obtained. One case is still pending. A sum of Rs. 710 was sanctioned as rewards. None of these cases call for any special remarks. No cases were detected at the other subordinate ports.

51. Working of the Merchandise Marks Act, Rangoon.—There were 371 cases of infringements under the Act as compared with 257 in 1911-12. The statement below shows briefly their nature and the manner in which they were dealt with:—

Class of case.	I	II	III	IV	Total.	Remarks.
	Passed without correction of marking or penalty.	Passed on correction of marking without penalty.	Passed with nominal penalty.	Passed with heavier penalty, or reshipped or confiscated subject to fine in redemption.		
A.—Application of counterfeit trade mark or false indication in respect of the person by whom goods were made or produced.	3	2	...	...	5	
B.—Application of false trade description or other indication in respect of the country in which the goods were made or produced—						
(1) As between the United Kingdom or British India and a Foreign country.	123	93	77	5	298	
(2) As between two Foreign countries ...	3	3	4	5	15	
C.—Application of trade description that is false in other respects, namely—						
(1) As to the number, quantity, measure, gauge or weight of the goods.	...	...	...	...	...	
(2) As to the time at which goods were made or produced.	...	..	...	...	...	
(3) As to the mode of manufacture or production.	...	...	...	...	...	
(4) As to the material of which the goods are composed.	8	5	5	2	20	
(5) As to the goods being the subject of an existing patent, privilege or copyright.	...	...	...	...	...	
D.—Length not properly stamped on piece-goods.	12	11	10	...	33	
Total	...	149	114	96	12	371

Class "A". Application of counterfeit trade mark or false indication in respect of the person by whom goods were made or produced.—Five cases of counterfeit (of prior users') trade-marks were reported under this class:—One of cotton blankets, two of iron hinges, one of cotton dhoties and one of lamp chimneys. All these were passed without penalty after the offending trade-marks had been removed at the request of the owners of the genuine marks.

Class "B". Application of false trade description or other indication in respect of the country in which the goods were made or produced.—There were 313 cases under this head against 194 in 1911-12, the increase being due to the increase in the number of small local dealers having entered the trade as direct importers of foreign goods during the year. Of the cases reported, 102 related to goods from Japan, 122 from Germany, 14 from Austria, 28 Holland, 10 United States of America, 13 Belgium, 14 Italy and the remainder from various countries. Two consignments of soap of Dutch origin packed in cartons closely resembling the make-up of Messrs. Pears' Glycerine soap and Messrs. Gosnells' "Wash Balls" were detained and allowed to be reshipped at importers' request. Two (Japanese) imitations of American "Cuticura" soap were also ordered to be reshipped in lieu of correct marking.

Other offences relating to German felt hats, gramophone records, Kananga water, cotton blankets and piece-goods, clocks, safes, etc., were passed with penalties or with warnings after the requirements of the Act had been complied with, while a few were reshipped without correction of marking. As in previous years cases of imitations of well-known trade-marks of European and American manufacturers were brought to the notice of the relative manufacturers or to the Consul of the country concerned.

Class "C". Application of a trade description that is false in other respects.—There was a small decrease under this head, only 20 cases being reported against 25 in the previous year. These related to condensed milk bearing descriptive labels without the words "Prepared from skimmed milk," non-spirituous perfumery, adulterated paints and paint substances not marked "adulterated" or "reduced," and cotton cloth with the words, "Superfine Spanish stripes," indicating a woollen material. The importation of these was allowed on payment of penalties and on correct marking. Other cases constituting minor offences were admitted either with a small penalty or with a warning, while a consignment of perfumery containing no alcohol, but without any statement to this effect, was allowed to be reshipped.

Class "D". Piece-goods with the lengths not properly marked.—There were 33 cases under this class, comprising 4 of woollen and 24 of cotton piece-goods in which length was not marked, and 1 of woollen and 3 of cotton piece-goods in which the marking was defective. In one case a consignment of saris in pieces made up of cut lengths aggregating 10 yards to the piece was passed with the warning that the number of cut lengths in each piece should be stamped in future.

The amount of penalties realized during the year amounted to Rs. 1,119 compared with Rs. 798 in the preceding year. There were no appeals during the year under review.

Subordinate Ports.—At Moulmein there was one case under Class C (4), and the goods were subsequently released without fine or further objection. There was one case at Akyab

under Class A, a fine of Rs. 200 having been imposed on the importers, and three cases at Tavoy under Class D, in each of which the importers were fined. From the other outports no cases were reported.

52. Appeals.—Nine appeals were preferred against the orders of the Chief Collector, seven under the Sea Customs Act and two under the Tariff Act. The original orders were upheld in seven of these cases, and in the remaining two, refunds of export duty were allowed by the Financial Commissioner as a special concession.

There were three formal appeals to the Chief Collector from the orders of the Assistant Collector and two appeals from the orders of an outport Collector, all of which were rejected.

53. Establishment.—Mr. A. S. Judge held the office of the Chief Collector of Customs throughout the year except for a period of one month and seven days from the 17th September to the 23rd October 1912, when he was on privilege leave. During his absence Messrs. B. W. Swithinbank, I.C.S., and A. H. Lloyd, I.C.S., officiated as Collector from the 17th to the 22nd September 1912 and 23rd September to 23rd October 1912 respectively.

Mr. A. H. Lloyd, Assistant Collector, proceeded on combined leave for six months from the 20th March 1912, and Mr. B. W. Swithinbank, I.C.S., officiated for him.

The office of the Assistant Collector and Superintendent, Preventive Service, was held by Mr. W. W. Nind during the year.

54. Administrative Changes.—Under the orders of the Local Government the Chief Superintendent was appointed Treasury Officer, thus allowing the Assistant Collector to devote more time to the work of the Appraising Department. The old Custom House built in 1867 was vacated during the year and temporary quarters were taken on a monthly rental of Rs. 1,475. The new Custom House is being built on the same site; it will be a four-storied building, with two sets of quarters for Gazetted Officers on the uppermost floor. Ample allowance has been made for expansion of trade. Proposals for the reorganisation of the Appraising and Preventive Establishments were submitted during the year. The casualties for the year were five deaths and one retirement (all officers), seven resignations (one officer and six menials), and two dismissals (both menials).

55. Miscellaneous—Customs Documents.—The total number of bills of entry and shipping bills dealt with in the Rangoon Custom House was 131,830 as compared with 120,605 in the preceding year, showing an increase of 9.3 per cent. Bills of entry advanced by 6,490 to 91,011. Shipping bills increased by 4,735 to 40,819. Import and Export Manifests rose by 105 to 3,141.

A volume of Office Directions compiled by Mr. A. H. Lloyd and a Manual for the Customs Preventive Service prepared by Mr. W. W. Nind were printed during the year.

All branches of the service worked well during the year. Special acknowledgments are due to Mr. Lloyd and Mr. Nind for the administration of their departments. The following officers also deserve special mention:—Mr. Porter, Head Appraiser, and all the appraisers working under his control; Mr. Yettie, Chief Superintendent and Treasury Officer; Messrs. Kraal, John, Arnall and Vengoo Pillay, Heads of Departments; Messrs. Branson, Moses, Harrison, Stacey and Woodsell of the Preventive Service. My thanks are due to Mr. Lloyd for his co-operation in the preparation of this report.

A. S. JUDGE,
Chief Collector of Customs.

RANGOON, the 6th May 1913.

