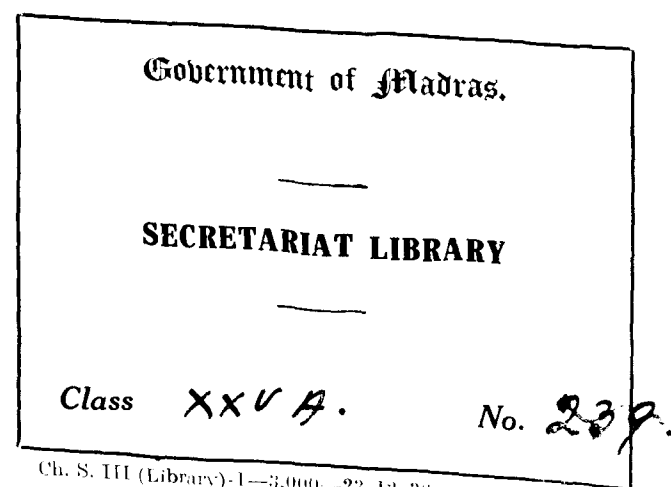


LANCASHIRE INDIAN COTTON COMMITTEE

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FIRST
ANNUAL REPORT
of the
LANCASHIRE
INDIAN COTTON
COMMITTEE
for the year ending
31st December
1 9 3 4

LETTER FROM PRESIDENT OF THE BOARD OF TRADE, THE RIGHT HON.
WALTER RUNCIMAN, M.P., TO SIR RICHARD JACKSON, CHAIRMAN OF
THE LANCASHIRE INDIAN COTTON COMMITTEE

14th January, 1935.

My dear Sir Richard,

I am glad to take the opportunity presented by the Report of the Lancashire Indian Cotton Committee for the year 1934, to express the Government's appreciation of the excellent work that is being done by the Committee. The Report is an interesting document, and to my mind contains a most effective exposition of the problems connected with the greater use of Indian Cotton in this country. I note with satisfaction the steps that have been, and are being taken by your Committee in grappling with these problems, and I trust that, in co-operation with the Indian interests concerned, still further progress will be made during the coming year. I am confident that effective co-operation with India in this matter is a very important factor in the policy of developing mutual trade to the lasting economic advantage of both countries.

Yours sincerely,

(Signed) WALTER RUNCIMAN.



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LANCASHIRE INDIAN COTTON COMMITTEE

COMMITTEE AND OFFICIALS

SIR RICHARD H. JACKSON, J.P. (Chairman)

Vice-President, Federation of Master Cotton Spinners Associations ; Chairman and member Executive Committee, Empire Cotton Growing Corporation ; Member Executive Committee, British Cotton Growing Association ; Member, United Kingdom Cotton Trade Advisory Delegation to Ottawa 1932.

T. ASHURST

Secretary, Cotton Spinners and Manufacturers Association ; Member, United Kingdom Cotton Trade Advisory Delegation to Ottawa 1932.

W. H. BARRITT

Chairman, Allied Association of Bleachers, Dyers, Printers and Finishers.

G. W. BENNETT

Ex-Member Executive Committee, Federation of Master Cotton Spinners Associations.

H. S. BUTTERWORTH

President, Manchester Cotton Association ; Member Executive Committee, Federation of Master Cotton Spinners Associations.

J. H. CONEY, J.P.

Vice-President, Liverpool Cotton Association.

FORREST HEWIT, J.P.

Member Executive Committee, Federation of Calico Printers.

H. G. HOUGHTON

Member India Executive Committee, Manchester Chamber of Commerce.

R. HOUGHTON, J.P.

Member Central Committee, Cotton Spinners and Manufacturers Association ; Member, United Kingdom Cotton Trade Advisory Delegation to Ottawa 1932.

SIR WILLIAM CLARE LEES, O.B.E., J.P.

Chairman, British Textile Mission to India, 1933.

J. LITTLEWOOD

Director, Lancashire Cotton Corporation Limited.

DR. R. H. PICKARD, F.R.S.

Director, British Cotton Industry Research Association.

SIR KENNETH D. STEWART, K.B.E.

Chairman, Merchants Committee on Indian Cotton.

E. RAYMOND STREAT, C.B.E.

Secretary, Manchester Chamber of Commerce ; Member, British Textile Mission to India, 1933.

E. J. GRIFFITH (Secretary),

Lancashire Indian Cotton Committee,
330-350, The Royal Exchange,
MANCHESTER 2

H. C. SHORT (Commissioner in India)

Navsari Building,
Hornby Road, Fort, BOMBAY

LANCASHIRE INDIAN COTTON COMMITTEE.

ANNUAL REPORT.

I. INTRODUCTORY.

The Lancashire Indian Cotton Committee was established by the President of the Board of Trade in the autumn of 1932, in pursuance of an undertaking given to the Government of India by the Government of the United Kingdom in the Commercial Agreement made between the two Governments at the Ottawa Conference in July of the same year. In September, 1933, the British Cotton Industry sent a Mission to India to discuss matters of mutual interest with representatives of the Indian Cotton Industry and to make representations to the Government of India. This Mission, under the chairmanship of Sir William Clare Lees, also included representatives of the Artificial Silk Industry, but for the special purposes associated with the problem of the extended use of Indian cotton, it may be conveniently referred to as a Lancashire Mission. It returned in November with a report which, upon its acceptance by all the responsible organisations in the British Cotton Industry, added fresh impetus and importance to the work of the Lancashire Indian Cotton Committee. In brief, the report of the Mission underlined and emphasised the desirability of a policy of economic reciprocity as particularly applied to all the interests associated with the cotton industry, from raw cotton to the finished product, in both countries, and embodied a programme of co-operation and mutual accommodation in which the Lancashire Indian Cotton Committee was allotted an active and significant part.

One of the most important proposals made by the Mission was the appointment by the Committee of a Lancashire Cotton Commissioner to reside for the greater part of the year in India, and to act as a personal link between India and the Committee in Lancashire.

In view of the extended programme of work which the Committee was called upon to undertake, the President of the Board of Trade, with the ready concurrence of the Lancashire trade organisations, considered it desirable to enlarge the membership of the Lancashire Indian Cotton Committee. This was done in January, 1934, and one of the first acts of the enlarged Committee was to approve the appointment of the first resident Commissioner in India.

These circumstances sufficiently explain why the present Annual Report, although the first report of a committee set up in 1932, should cover the period of the calendar year 1934. It only remains to be added that the Committee reported upon its earlier transactions, which were necessarily of a preliminary character, in direct communications

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 - (a) In India.
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to the Government and trade bodies from which it derived its authority, in addition to presenting a survey of its work at a public meeting at the Manchester Chamber of Commerce in July, 1933, a report of which was afterwards circulated in pamphlet form.

The enlarged Committee, the constitution of which is set out in detail on an earlier page of this report, has held regular monthly meetings throughout the year. Mr. R. Fleming, who was appointed Commissioner in India for the Committee in January, 1934, took up his duties early in February. About the same time, Sir Richard Jackson, chairman of the Committee, visited India and made an extensive tour, with Mr. Fleming in attendance. The great utility which attached to the contact and co-operation between India and Lancashire made possible by the appointment of a Commissioner, was at once apparent. To the profound dismay and sorrow of all concerned, Mr. Fleming's activities were cut short by a sudden illness in May, from which, unfortunately, he never recovered. His death in Bombay, on May 5th, was a severe loss to the movement, and is greatly deplored by the Committee, which desires to place on record its appreciation of the notable services he rendered even during his short period of office. A successor could not have been sent to India immediately; indeed, it had been the intention of the Committee to bring Mr. Fleming himself home for consultations in England during the months of July, August and September. The Committee subsequently appointed Mr. H. C. Short to fill the vacancy caused by Mr. Fleming's death, and after working for some weeks in Lancashire, Mr. Short sailed for India in October. Mr. Short had had a long connection with India, latterly as partner of a firm with wide experience in the cotton business. He had severed all connections with his former business interests, and was therefore free to take up the public duties associated with the post of Cotton Commissioner.

It is important to appreciate how widely representative the Committee is of every activity in Lancashire which is capable of playing a part, directly or indirectly, in the project which the Committee was set up to promote, namely, the extended use of Indian cotton. The chairman, Sir Richard Jackson, himself a cotton spinner, has been connected for many years with the work of the British Cotton Growing Association and the Empire Cotton Growing Corporation, and, as one of the Lancashire advisory delegates who attended at Ottawa during the Imperial Economic Conference of 1932, has been associated with the movement from the outset. The other members include representatives of the leading trade associations in the spinning, weaving, finishing and merchanting sections of the Lancashire industry, whilst, in the person of Dr. R. H. Pickard, a close link is established between the work of the Committee and the British Cotton Industry Research



*Some of the Members of the Lancashire Indian Cotton Committee
photographed after a recent meeting.*
Back Row : E. J. Griffith (Secretary) ; J. H. Coney ; G. W. Bennett ;
J. Littlewood ; H. G. Houghton ; E. Raymond Streat, C.B.E.
Front Row : Sir Kenneth D. Stewart, K.B.E. ; Sir William Clare
Lees, O.B.E. ; Sir Richard Jackson (Chairman) ; R. Houghton ;
W. H. Barritt.



*Discharging Indian Cotton
at Manchester Docks*

Association, of which Dr. Pickard is the director. Subsequent paragraphs of this report will show how the Committee is calling into being active co-operation between all these sections of the industry to further the end in view.

II. THE FACTS OF THE INDIAN COTTON POSITION.

It may be convenient in this first Annual Report to present a brief review of the facts of the Indian Cotton position, even at the expense of repeating details with which many readers may be familiar. In an appendix there will be found graphs and statistical tables compiled by the Economic and Statistical Department of the Joint Committee of Cotton Trade Organisations, setting out the consumption in different countries of Indian cotton in past years, together with figures in regard to other growths of cotton and relative average prices.

These figures will tell their own story. They bring out clearly not only the highly satisfactory progress which has been made, but the field which exists for further expansion, given a satisfactory policy as regards the encouragement of the right type of cottons in India, an increasingly efficient control of ginning and distribution, and the cultivation of an overseas as well as a domestic market.

It is an axiom that no factor in international trade is as powerful as the overwhelmingly important factor of price. It will nevertheless be clear to all who have an intimate knowledge of the ramifications of the world cotton industry that India's future as a producer of raw cotton cannot safely be left to be determined by the operation of the price factor alone, but depends very largely upon the degree to which successful endeavours can be made to organise and regularise agricultural production in India itself, and upon a considered and efficient commercial policy designed to meet the circumstances of the overseas as well as her home market.

It has to be remembered that in the matter of cotton growing for world consumption, India is engaged in a field in which the principal competitor—the United States of America—deservedly holds a position of dominance, due not merely to long experience and the suitability of her natural and climatic conditions, but also to a large-scale export organisation erected by years of private enterprise and supported by suitable governmental activity. The Lancashire Indian Cotton Committee suggests that the present situation as regards Indian cotton brings out in a forcible manner the very definite limits to the degree of progress which can be achieved by the operation of the price factor, unaccompanied by measures to secure the proper cultivation of different types and the proper organisation of markets. The extension of Indian cotton production to date may be ascribed largely, if not entirely, to the

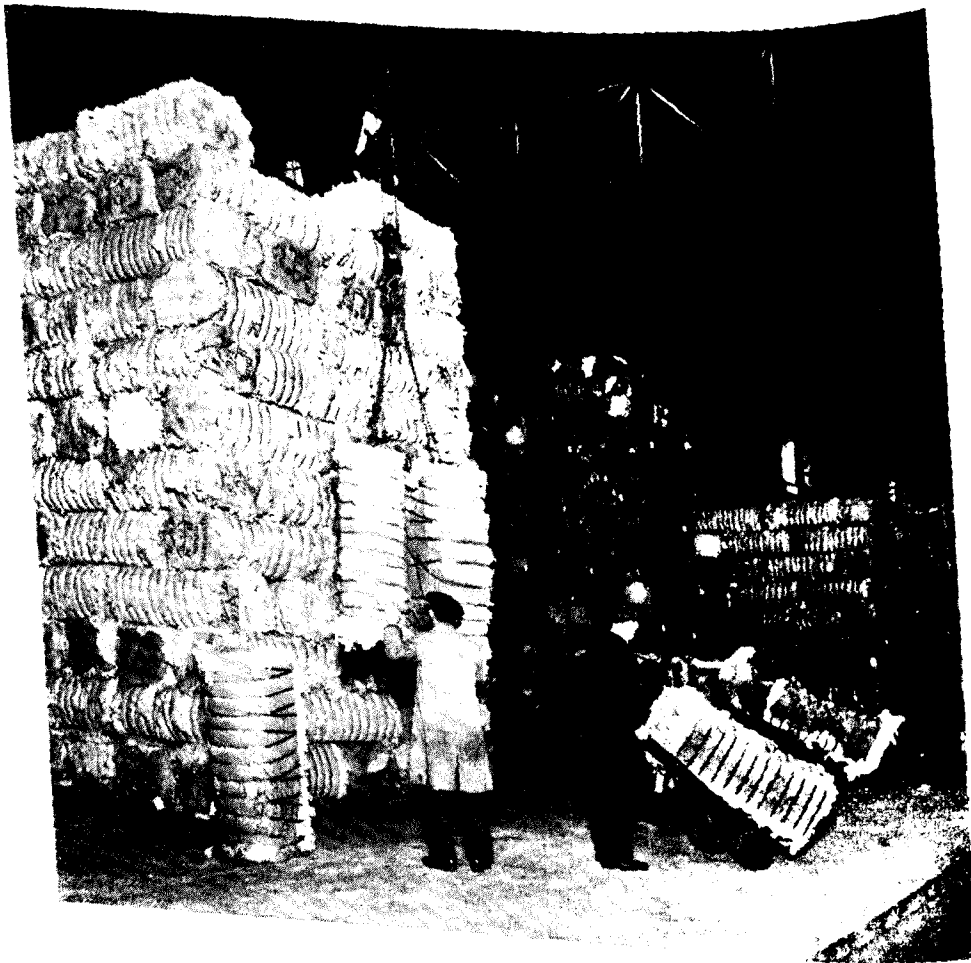
price factor, but with the intensive development of the cotton manufacturing industry throughout the world in the last decade, there has been evidenced a clear and striking tendency on the part of those who were originally large purchasers of Indian cotton, to turn to the longer staples produced elsewhere and marketed under conditions affording the spinner better guarantees of uniformity of type and improved regularity of commercial supplies. The lesson to be drawn from these considerations is that India's future as a raw cotton producer is dependent in an important degree upon the measures she may take to organise an enlarged demand, and to extend and perfect the methods of control adopted at different stages in the cotton growing districts.

These considerations have been fully realised by the authorities in India for many years. In 1921 the Government of India set up the Indian Central Cotton Committee to tackle these problems, and the Agricultural Departments for an even longer period have shown a keen realisation of their responsibilities, but the vastness of the country and the social conditions make agricultural organisation of any kind a problem which will take much energy and time to surmount. To this established policy of the Government of India, the Ottawa Agreement brought the opportunity of an extremely significant development, in the form of a co-operative and complementary effort functioning in Great Britain. It must be clear to every imaginative person that whatever may have been the possibilities inherent in the work of the Indian Central Cotton Committee hitherto, they are incalculably greater when their endeavours are linked up with complementary and equally authoritative and energetic efforts in the English market.

It is of interest when considering these wider issues to contrast the position in Japan with that existing in England. Japan has taken by far the largest quantities of Indian cotton absorbed by any overseas market in years gone by. But she has done so quite naturally for purely commercial reasons, and because it suited her economy of the moment. Her recent extension of manufacturing activity has been built up on American and Egyptian cottons rather than Indian, broadly speaking, and when India began to impose in her own market effective protective duties on foreign cotton piece goods, Japanese interests instituted a boycott of Indian cotton, notwithstanding the fact that Japan herself had maintained heavy protective duties on cotton manufactures in her home market for a considerable number of years. These grave issues have been stabilised for the time being, if not solved, by the Indo-Japanese Agreement of January, 1934, under which, at the price of admitting a very large volume of Japanese manufactures to the Indian market, the Indian Government have secured, at any rate



*Unloading of Indian Cotton
at a Lancashire Mill*



*In a Manchester
Cotton Warehouse.*

temporarily, guarantees of a continued purchase of Indian cotton in satisfactory volume by Japan.

The position in Lancashire as regards Indian cotton is remarkably different. The Lancashire industry, in its period of maximum development, found in America a source of raw cotton which, from the point of view of type, quantity and regularity, met the needs of the times. Lancashire, therefore, developed on the basis of America as a source of supply for medium staple cotton. Consequently, the Lancashire consumption of Indian cotton has been relatively small, and has risen and fallen from year to year within small maximum limits, as a result of the effects of price and parity variations.

The Ottawa Conference was held because statesmen in every country in the Commonwealth of British Nations realised that the unprecedented post-war economic depression had created entirely new problems for their overseas trade. The old economic doctrines, although theoretically as right as ever they had been, could no longer be relied upon in a world in which economic nationalism was rampant, and the greatest hope which the units in the British Empire could entertain of emerging from the depression, still in the vanguard of the commercial nations of the world, was to support each other while the depression lasted, and by a policy of reciprocity make available to each the economic strength of all. As applied to Indian cotton, this policy meant that Lancashire would exert every effort to increase her own consumption and assist in developing European markets. As applied to the Indian market for manufactured goods, it meant that India would place Lancashire second only to her own industry, and enable Lancashire goods to enjoy a fair share of the Indian market.

The question naturally arises as to why the United Kingdom Government did not or should not encourage consumption of Indian cotton by means of a differential duty, minimum quotas, or by other similar methods. The answer is that raw materials for industry cannot be dealt with in the same manner as finished products, and no country, so far as the Committee is aware, has taken the dangerous course of attempting to do so for any raw material which is entirely imported into it. Quite apart, however, from fundamental objections on grounds of economic policy, it is true to say that to have dealt with the situation by tariff or quota without first ensuring the existence of a commercial demand and a commercial supply which would be complementary, would have merely resulted in a fatal dislocation on both sides. The tariffs or quotas would not have fully achieved the hoped-for results, and the aims in view, as well as the policy, might have been discredited. This was recognised on all hands, and the saner, though more laborious,

alternative was adopted, of joining hands in organising a simultaneous development of the right demand and the right supply. It is an enterprise which, so far as the Committee is aware, is without precedent in economic history. Most suppliers of any commodity have had to force their way into indifferent or hostile markets. So long as the United Kingdom-Indian economic reciprocity agreement continues, Indian cotton is knocking at an open door. And the Lancashire Committee is confident that practical results, as the years go by, will prove the success of this policy.

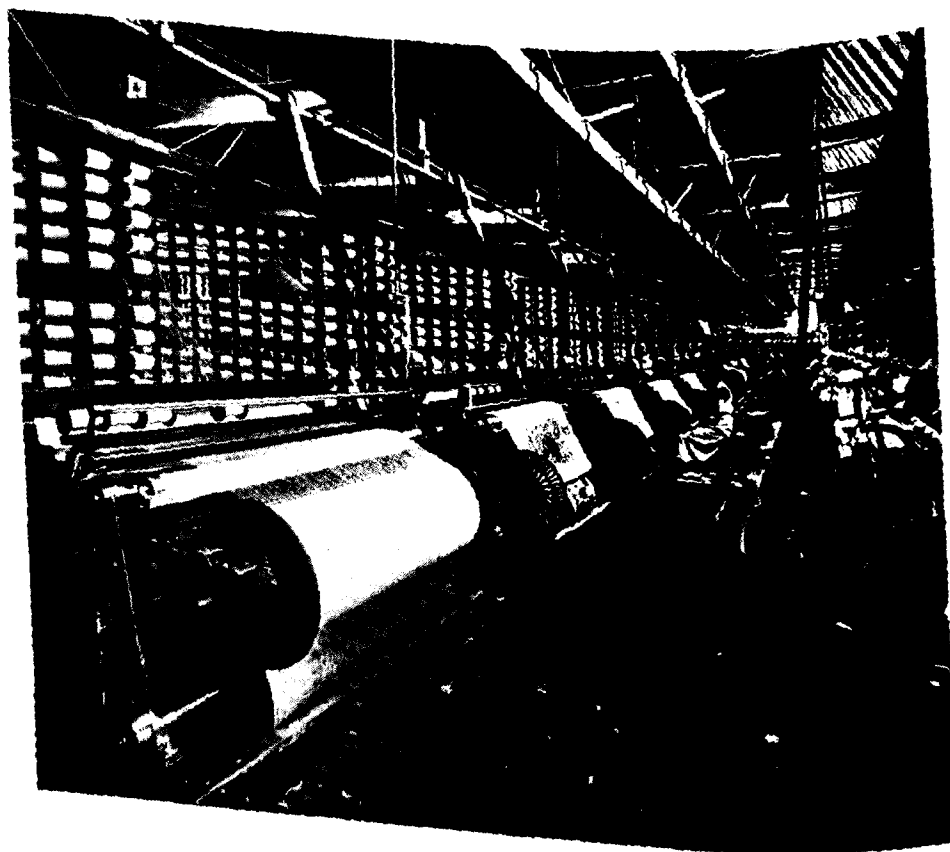
The imports of Indian cotton, according to the Liverpool Cotton Association's Weekly Circulars, in the season 1933-34, at 361,546 bales, exceeded the figures for the previous season by no less than 131,806 bales, or 57 per cent. It is impossible to say to what extent this striking increase can be ascribed to the parities obtaining throughout the season, and to what extent to the activities of the Committee. The favourable parity has undoubtedly been a helpful factor, but the main point is that, thanks to the work of the Committee, an increase in consumption has been achieved much greater than could have been occasioned by parity alone, whilst conditions have been brought about which will maintain consumption at a higher level permanently.

III. POPULARISING INDIAN COTTON IN LANCASHIRE.

One of the principal objects which the Committee has set itself to achieve is to bring about a situation in the Lancashire industry in which there shall always operate what may be described as a voluntary preference for Indian cottons. The aim in view is that every unit in the industry should be encouraged, other things being equal, to "prefer Indian." Lists have been drawn up of spinners making yarn from Indian cotton and manufacturers weaving cloth containing yarn made from Indian cotton. By constant personal approaches and by practical demonstrations of the commercial and technical advantages of Indian cotton, the Committee has tried to extend these lists from week to week. The result has been that many firms who never previously used Indian cotton, and who, indeed, have assumed that products of the type in which they specialised could not be advantageously made from Indian cotton, have begun to employ it and found it satisfactory. Providing that this movement is accompanied by three complementary developments, it cannot fail to have permanently beneficial results. In the first place, of course, it will be necessary to maintain conditions under which the incentive to Lancashire as a whole to foster reciprocal trade with India remains operative. That is a wide and general question, to which further reference will be made later in the report. The other two necessary complementary movements are an improvement in the regularity of



*Inside a Lancashire Spinning Mill :
Ring Spinning of Indian Cotton*



*Inside a Lancashire Spinning
Mill : Beaming Indian Cotton*

the supplies of Indian cotton in the English market, both as regards quality and quantity, coupled with an ever-increasing demand from the home and export merchants of Manchester for goods made from Indian cotton. In this latter connection, the Committee has had the co-operation of a special sub-committee of merchants set up by the Manchester Chamber of Commerce, under the chairmanship of Sir Kenneth Stewart. At regular intervals the whole mercantile community in Manchester has been circularised. They have been provided with lists of suppliers able to offer goods made from Indian cotton, and the arguments in favour of cultivating reciprocal trade with India have been brought to their notice in a particularly emphatic manner. On this particular point, reference may appropriately be made to the display organised by the Committee at the British Textiles Exhibition in February, 1934, which is to be followed by another similar effort in 1935. These displays have shown the wide range of products which are now being made with technical success and commercial advantage from Indian cotton, and there can be no question that they have created a profound and lasting impression on the minds of buyers throughout the trade. This work will be continued by the Committee, and will gather momentum as time passes. It is impossible to over-estimate the significance and value of this factor of "voluntary preference." It is an axiom of trade everywhere, and in every commodity, that nothing is more important than goodwill, and the goodwill in Indian cottons, which the work of the Committee is creating, bids fair to constitute an asset of lasting value.

There will be found in an appendix an up-to-date list of the Lancashire spinners and manufacturers using Indian cotton, and another list of products now being made from Indian cotton. The general reader will find in these lists eloquent proof of the dimensions already achieved by the work of the Committee. Readers who are engaged in the Lancashire trade will, it is hoped, put the lists to practical use in their own business transactions. In raw cotton circles, whether in India or England, the lists will doubtless be used, as it is intended they should, as both a guide and encouragement for increased and extended activity in merchandising different types of Indian growths.

IV. TECHNICAL INVESTIGATIONS OF INDIAN COTTONS.

It has been fully appreciated by the Committee that its efforts in other directions would be in danger of proving ineffective after a time, if spinners who loyally responded to their appeal to substitute Indian cottons, encountered difficulties with which they could not cope on technical grounds. To obviate this danger, the Committee has taken two important steps; in the first place, it has instituted an Advisory

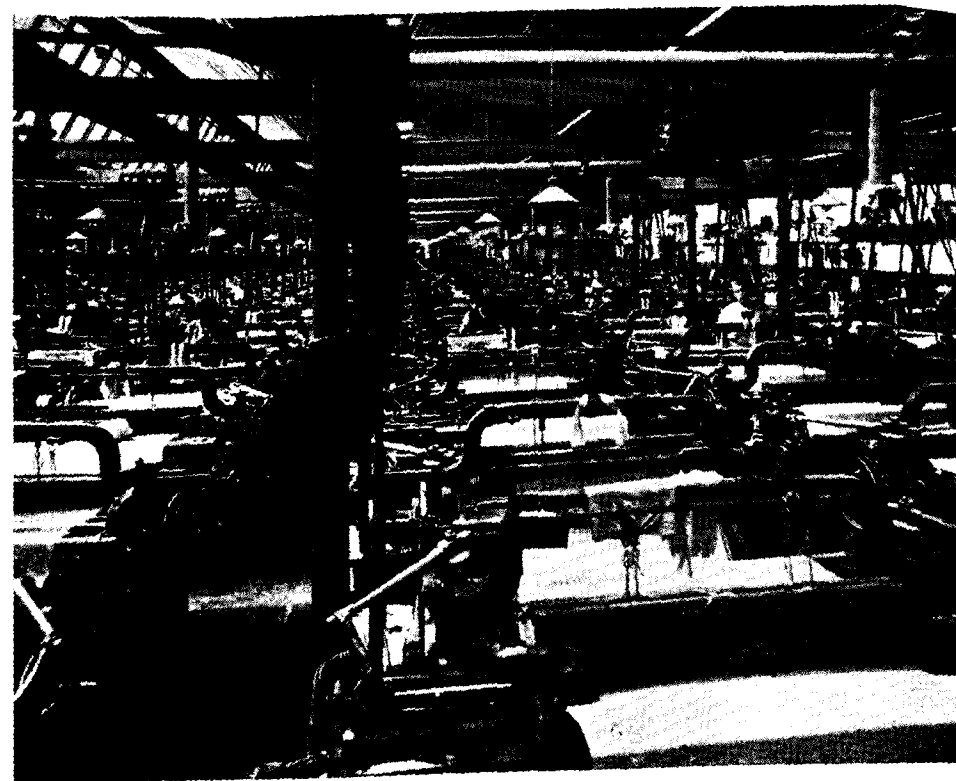
Panel to be at the service of spinners desiring advice on technical matters; and secondly, it has enlisted the co-operation of the Shirley Institute in carrying out investigations on a number of specific points arising in the processing of Indian cottons.

Extensive investigations have been made at the Shirley Institute to find the best methods of processing short staple Indian cottons. The results of these investigations have been published by the Shirley Institute, at the request of the Committee, in special memoirs, the first of which dealt with "The Present Character and Imminent Developments of the Indian Cotton Crop." One of the matters dealt with related to the modifications necessary for adapting Lancashire spinning machines for satisfactory processing of short staple Indian cottons. Researches made at the Shirley Institute have indicated how this handicap may be, to a large extent, overcome at very small expense, and with very little detriment to the character of the yarn.

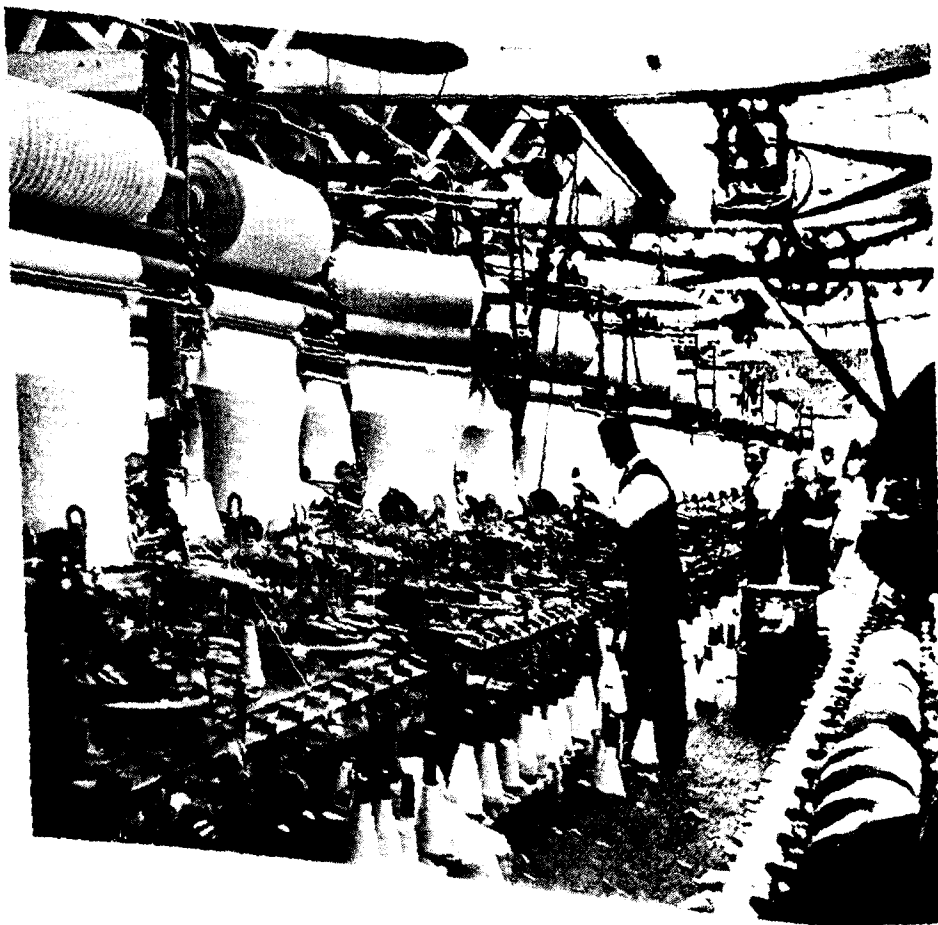
Another point which has received attention is that of the best twist to use both in the card room and in spinning for the processing of the short staple Indian cottons; as a result of this work a table was drawn up showing the best twist factors to use for different hank numbers of these cottons, and also to give the highest lea strength of yarn. Another important factor in the processing of these short cottons is the draft employed at various stages in the card room and in spinning. This also has been the subject of investigation, as a result of which valuable recommendations have been made.

The first memoir dealt with other aspects of the Indian cotton crop. The first section was chiefly descriptive of the different varieties obtained from the various cotton-growing tracts. The principal characteristics of each variety were stated—staple length, colour, cleanliness, and feel—and tables were given showing the crops of the different types of cotton during the past four years, and also the exports of the different varieties classified in addition, according to their destinations.

The final section of the memoir was concerned with imminent developments of the Indian cotton crop, and included a consideration of the factors affecting the character and quantity of supply of Indian cotton. Reference was made to the research and extension work of the Indian Central Cotton Committee, and of the Indian Departments of Agriculture. Particular attention was drawn to the development of Verum cotton in the Oomras cotton tract, and its greatly improved staple compared with the Oomras which it is displacing. Reference was also made to the measures being taken to combat the ravages of



A Lancashire Weaving Shed using Indian Cotton



*Hosiery from Indian Cotton
A Modern Knitting Plant in the Midlands*

the pink boll worm. The crop of Cambodia, an excellent medium staple cotton, is also likely to increase considerably, while a much larger increase may be expected from the extension of irrigation in Sind, following the opening of the Lloyd Barrage at Sukkur.

At the request of the Committee, a special exhibition of Indian cottons and methods of processing them was held at the Shirley Institute, on January 11th, 1934, for the benefit of members of the British Cotton Industry Research Association interested in extending the use of Indian cotton in Lancashire. Representatives of over 100 firms were present, and keen interest was shown in the exhibits of short and medium staple Indian cottons and in the results obtained by different methods of processing in spinning, sizing, weaving and finishing.

The exhibits of Indian cotton comprised samples of the cottons themselves, sorter stapling diagrams of the cottons, photographic enlargements of cross sections of the cotton hairs, and yarns both on bobbins and wound on black cards.

The cottons shown were the improved Bengals types, Mollisoni from the Punjab, and Aligarh A.19 from United Provinces, a commercial Oomras, Coconadas, and the following medium staple types: Punjab American 289F, a selected Cambodia cotton Co.2, and the new improved Oomras cotton known as Verum.

In spinning, a demonstration was given of the best methods of processing the short staple varieties, special attention being paid to the adaptation of existing machinery for the processing of these cottons in card and spinning rooms. Bengals and Oomras cottons were also shown spinning under various conditions.

Seven warps all made from Oomras mule twist were shown weaving in plain Lancashire looms; the yarn had been spun at a mill and wound, beamed, and sized at the Institute. The warps had been sized to different percentages with different size mixings. Some of the cloths had been cropped and calendered; others had been brushed and cropped, and after a high pressure caustic bleach had been printed in various styles for home, Indian, North and South African, and South American markets. These prints were very satisfactory.

In pursuance of the policy of making investigations of the processing of short staple Indian cottons, a series of large-scale experiments was carried out by the Shirley Institute staff in mills belonging to members of the British Cotton Industry Research Association, and working under normal conditions, except that all the sizing was done

at the Shirley Institute on a full size tape frame run at industrial speeds. The yarn was wound at three mills, sized at the Shirley Institute, and then woven in a large shed.

This investigation was undertaken to answer the specific question: What type of yarn and what size mixing are necessary for best results in weaving? The experiment was confined to a clean Oomras cotton of staple $\frac{1}{8}$ inch, giving 5 per cent. blowroom loss. Different size mixings in various percentages were applied to the warps, which were prepared for weaving a plain cloth 36 inches wide, 96 yards long, 40 ends, and 44 picks per inch. Altogether, 224 weavers' beams, each 300 yards long, were prepared; these were woven in 56 looms over a period of about four weeks, giving about 9 tons of cloth, all of which was sold as "firsts." From this experiment very valuable information was obtained as to the best conditions to use in the spinning, sizing and weaving of the Oomras cotton.

Short staple cottons constitute approximately two-thirds of India's annual cotton crop, and these alone are available in quantity at the present time to Lancashire spinners. For this reason, as already indicated, investigations at the Shirley Institute have been largely directed to finding the conditions under which the short staples may be processed to the best advantage. But although medium staple Indian cottons are not at present exported in any great quantity, yet as a consequence of attempts now in progress in India to extend the growing of these staples, it is by no means unlikely that in the next few years considerable quantities of these will also be available for export. The Committee has therefore arranged for a number of spinning tests to be made at the Shirley Institute on the more popular types of the medium staples now finding favour with cotton growers in India, in order that Lancashire spinners may have early information concerning their spinning qualities.

The following are among the cottons which have been tested: Punjab-American 4F, Punjab-American 289F, Mollisoni, and Sanguineum from the Punjab; Verum 262 from the Central Provinces and Berar; Surat 1027 and Jayawant from the Bombay Presidency; Karunganni and Cambodia from the Madras Presidency.

The cottons tested have all been subjected to a comprehensive series of fibre and spinning tests and to separate tests for cleanliness by means of the Shirley Analyser. The fibre tests were those which comprise the Institute's Combined Stapling Test; this test gives a measure of the length by means of a sorter diagram, of the fineness of weight per unit length of hair, and of the maturity of the sample by direct counting under the microscope of the hairs of different classes—

normal, thin-walled and dead—after they have been subjected to certain chemical action. In the spinning tests the cottons were each spun in three or more counts—generally in 24's, 32's and 40's. All the yarns were subjected to the lea and ballistic tests, and were also inspected on blackboards for their appearance. The reports issued on these medium staple cottons gave the full technical details of the results of the tests, and also some idea of the present commercial positions of each cotton, as evidenced by the size of crop produced in the last year or two.

V. WORK TO BE DONE IN INDIA.

The experience of the Lancashire Indian Cotton Committee so far has shown clearly that its success cannot be as full and complete as could be wished, unless the efforts that are being made are accompanied by complementary efforts in India. It is no reflection on the Indian interests concerned to observe that in past years the conditions have not been such as to lay a stable foundation for an increased off-take in Lancashire of Indian cottons. There has been no directed and organised effort to cater for the English market. It has been left very much to look after itself, and as it has been so much smaller than the Indian home and Japanese markets, there has been no special incentive to private enterprise to initiate fresh developments.

It is now being increasingly realised, both in India and in Lancashire, that any permanent and considerable increase in the absorption of Indian cottons by the British industry is dependent primarily upon a high degree of regularity and reliability in the supplies available from season to season. The ideal to aim at is not only the improvement of the types of cotton produced, but also supplies of successful types which are adequate in volume to create a reasonable market, and of which the regularity and reliability are beyond reproach; the more nearly this ideal is attained, the greater will assuredly be the response of the British industry.

In this connection, a distinct problem emerges as regards the prevailing practice of mixing different growths. In times past, Indian cottons have competed in the British market mainly on prices. Both seller and buyer have been anxious to reduce the price by every possible means. For many years this objective has been very largely pursued by mixing types in lots bought and shipped for consumption in Lancashire. Price, rather than absolute regularity and reliability, has governed the approach of buyer and seller to each transaction. Cotton consisting of mixed types is obviously less reliable than cotton of a uniform type, but at a price it might conceivably be attractive to some buyers, and under certain market conditions it has, in fact, proved attractive, but it can be so only in a limited market. If the types mixed

and the proportions of each had been kept constant, the consequences might not have been so adverse to a more widespread utilisation of Indian cottons. But in practice, mixing has been inconstant to a degree; widely different types have sometimes been mixed together in inconstant proportions, and the result has been the very opposite of that regularity and reliability which is clearly so desirable.

The hold which this practice has upon the trade is not the fault of present buyers and sellers. They have inherited conditions in which it has been unavoidable. The situation can only be remedied by such improvements in the methods in force in India as will prevent the practice being followed in ginning and pressing factories. The Lancashire Indian Cotton Committee knows the Indian Central Cotton Committee to be at one with it in this matter, and although private enterprise enters very largely into the question, it is hoped that enlightened private enterprise will increasingly follow the lead which the Indian Central Cotton Committee is constantly trying to give in the direction of improved methods. The importance of this work cannot be too strongly stressed, and the Lancashire Committee appeals to all concerned in India to give it a prominent place in their future activities.

It is not without interest and significance to reflect that the impetus given to these organised efforts by the existence and work of the Lancashire Indian Cotton Committee will undoubtedly spread beyond the boundaries of the Lancashire market for raw cotton. Every step taken to meet the problems which exist in Lancashire will *ipso facto* tend to improve the prospects in other potential markets for Indian raw cotton, notably the European countries in which cotton manufacturing takes place.

In addition to the problem created by mixing, there is another equally important objective which the Lancashire Committee is glad to know occupies a prominent place in the programme of the Indian Cotton authorities. This is the cultivation of increased production of new and improved types of cotton in different districts in India. The Committee recognises that in some areas the soil and climatic conditions may make it essential for a long time to come for the farmers to plant short stapled varieties; but there can be no doubt whatever that India's future place amongst the countries which produce raw cotton depends very largely upon an early enlargement of her production of improved types. The history of the world cotton industry has been one of perpetual improvement in the finished products. The price of success in a highly competitive world is an unending process of changing over from the good to the better in a ceaseless search for the best. On this

long view the value to India of maintaining a situation, in which there is a permanent and highly authoritative official effort in Great Britain to co-operate with India in this process of development, cannot be over-estimated, and the Lancashire Indian Cotton Committee looks hopefully to results which should be possible of achievement as a consequence of its co-operation with Indian raw cotton interests.

VI. CONCLUSION.

In conclusion, the Committee feels called upon to offer a few general observations on the Imperial economic policy which brought it into being and rendered the work so important and desirable. It is appreciated that this report is written equally for readers in India and in Lancashire, and in what is said an endeavour has been made to take a broad view.

The Committee regards the work as a by no means unimportant contribution to a policy of developing mutual trade within the Empire, which has been rendered doubly desirable and advantageous by the disturbed economic conditions prevailing in the world at large as a result of the upheaval of the Great War. It is firmly believed that, apart from all considerations of politics or imperial patriotism, this policy should commend itself to the peoples of India and the United Kingdom as the safest, if not the only, basis on which to achieve some measure of mutual security against the stresses and strains of intensive competition in a world saturated with economic nationalism. Fortunately, for the British Empire, it contains within its boundaries a sufficient range of natural wealth and well-developed economic organisation to make itself tolerably secure, even if no great improvement in conditions is obtained in the outer world. On the lowest plane of selfish "Safety first," therefore, the present economic policy of Empire countries seems to the Committee to be an indispensable necessity.

The Committee suggests that it would be a mistake for any part of the Empire to press the arguments about reciprocity to an extreme or to apply the policy from day to day with too rigid a measure. If each partner is to insist upon measuring the advantages exchanged with another partner at the moment of exchange, and to refuse ever to allow what one may appear to be giving to exceed on a narrow statistical basis what the other is giving, the consequence will be that the minimum instead of the maximum benefit will be derived. The policy will only operate to the real benefit of the countries concerned if there is both trust and tolerance as between the partners.

The Lancashire Indian Cotton Committee is well aware that in certain quarters in Lancashire there is a tendency to point to the course of trade in United Kingdom textiles exported to India and to argue that until conditions have been created which give that trade a fair chance of regaining some substantial part at least of the very large ground which has been lost, Lancashire should withhold its co-operation in the matter of Indian cotton. In the view of the Committee, the policy of developing mutual trade must be pursued by each side in the full confidence that the other side will also do what it can; and each party's contributions to it must be as substantial as possible in the circumstances of the moment. The Committee feels that the success of its work will necessarily fade into ineffectiveness if time goes on and no reciprocal advantages emerge on the other side of the account. Nevertheless, the members of the Committee believe sufficiently in the merits of the policy to continue their efforts with unabated energy. They hope that the coming year will witness an improvement in this respect, and they trust they will receive encouragement in this direction from those in India who are working along complementary lines towards the same goals.



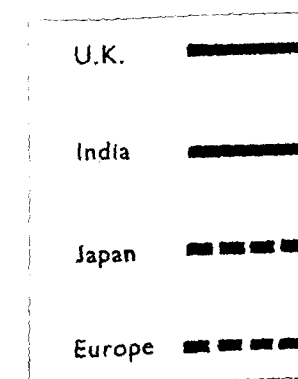
ACKNOWLEDGMENTS

The Committee wish to acknowledge gratefully the special services rendered by one of their number, Mr. E. Raymond Streat, C.B.E., in drafting and editing the present report. They also wish to record their appreciation of the co-operation of Mr. H. G. Hughes, Director of the Joint Committee of Cotton Trade Organisations, whose Economic and Statistical Department has furnished the charts and statistical tables, and of Mr. K. R. Brady, who has kindly given invaluable help and advice in planning the printing and production of this booklet.

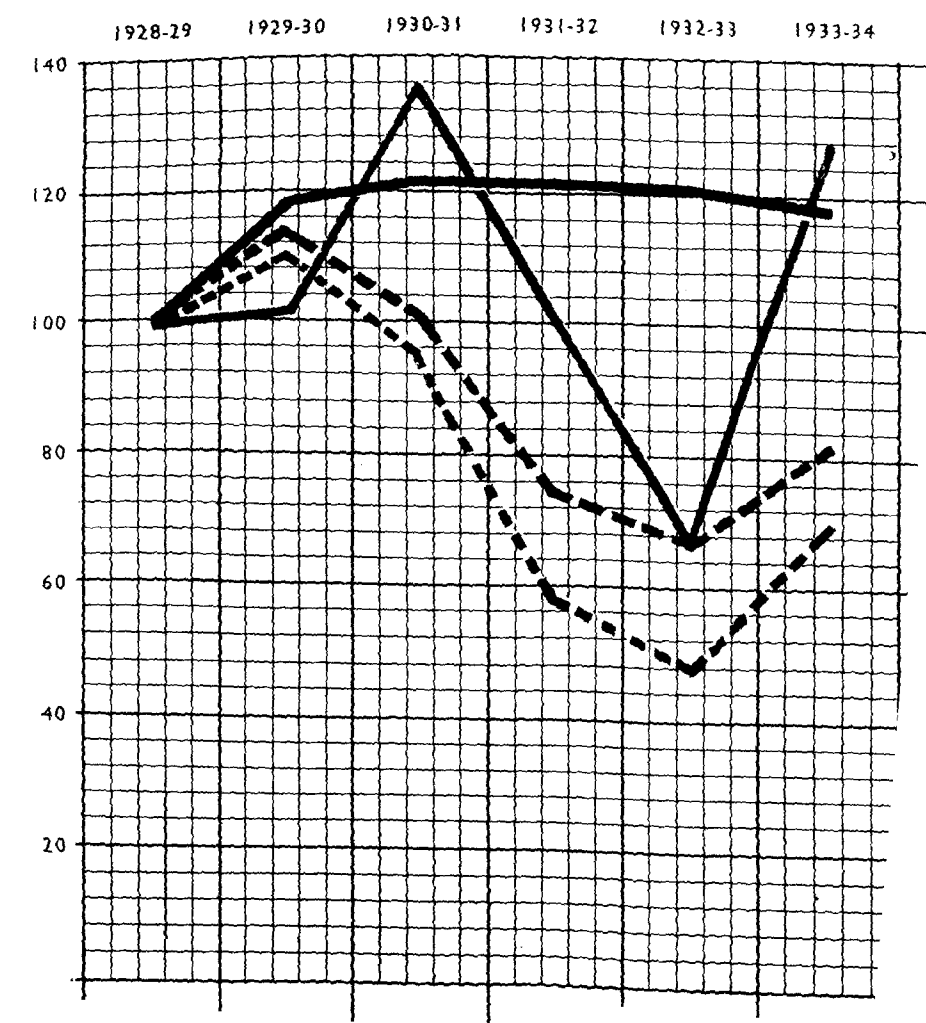
CONSUMPTION OF INDIAN COTTON

Fiscal Years :		1928-29	1929-30	1930-31	1931-32	1932-33	1933-34
Total All Countries ..	Million lbs.	2,036	2,398	2,311	1,892	1,661	1,884
United Kingdom ..	Million lbs.	72	73	98	72	49	92
	Index (1928-29=100)	100	102	136	100	68	128
India ..	Million lbs.	752	897	919	918	908	891
	Index (1928-29=100)	100	119	122	122	121	119
Japan ..	Million lbs.	580	662	585	435	389	477
	Index (1928-29=100)	100	114	101	75	67	82
Europe ..	Million lbs.	446	494	428	263	217	312
(excl. U.K.) Index (1928-29=100)		100	111	96	59	49	70

This chart shows how the main markets for Indian cotton have varied in importance during the last six years. The market in India itself has naturally been fairly steady, though there has been a downward tendency in the last three years. The world depression resulted in a decreased demand for Indian cotton outside India in the years from 1930 to 1932, but it will be seen that the share of the United Kingdom declined less than those of Japan and Europe. In the last year (1933-34) there was a sharp increase in the consumption of Indian cotton outside India, but the consumption of the United Kingdom rose relatively very much more sharply than that of other countries.



Source :
International Cotton
Bulletin



EFFECT OF PRICE ON CONSUMPTION FOR INDIAN COTTON

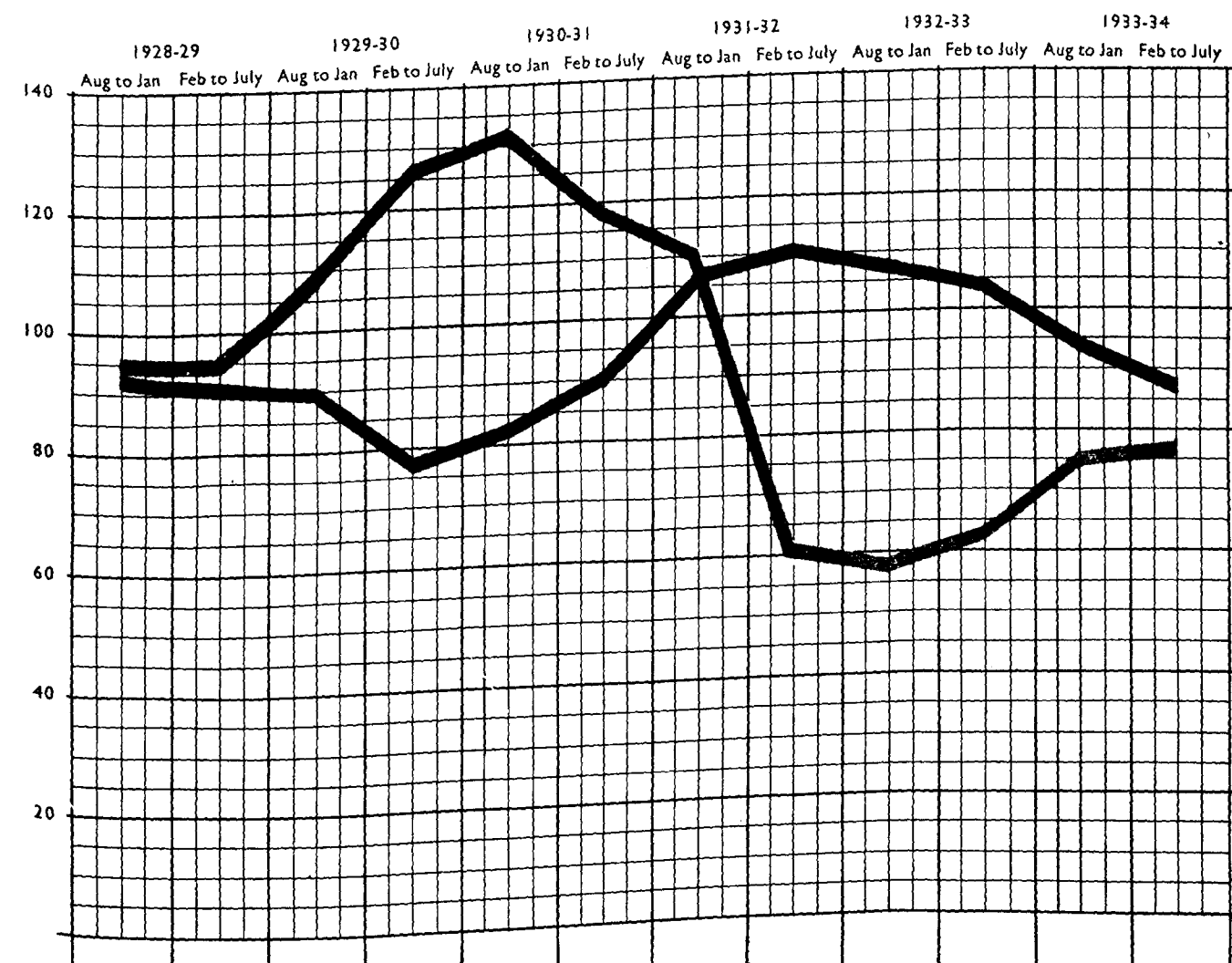
	Average Aug. 1923 to July 1928	Aug. 1928 to Jan. 1929	Feb. 1929 to July 1929	Aug. 1929 to Jan. 1930	Feb. 1930 to July 1930	Aug. 1930 to Jan. 1931		1931 to Jan. 1932	Aug. 1931 to Jan. 1932	Feb. 1932 to July 1932	Aug. 1932 to Jan. 1933	Feb. 1933 to July 1933	Aug. 1933 to Jan. 1934	Feb. 1934 to July 1934	
Consumption Outside India :							million lbs.								Consumption Outside India :
Total (all growths) ...	5,155	5,620	5,633	5,645	5,008	4,811		4,811	4,505	5,038	5,361	5,393	5,366		Total (all growths) ...
Indian ...	612	644	642	740	759	638		638	334	353	408	493	499		Indian ...
Indian as per cent. of total ...	11.9	11.5	11.4	13.1	15.2	13.3		13.3	7.4	7.0	7.6	9.1	9.3		Indian as per cent. of total ...
Index of relative consumption of Indian (average percentage of total, 1923-28 = 100)	100	96.6	95.8	110.1	127.8	111.8		111.8	62.2	58.8	63.9	76.5	78.2		Index of relative consumption of Indian (average percentage of total, 1923-28 = 100)
Price :							pence per lb.								Price :
American ...	12.30	10.63	10.46	9.78	8.24	4.97		4.97	4.88	5.55	5.44	5.52	6.51		American ...
Indian ...	10.13	8.17	7.92	7.28	5.32	4.41		4.41	4.49	4.95	4.70	4.32	4.72		Indian ...
Indian as per cent. of American ...	82.36	76.86	75.72	74.44	64.56	88.73		88.73	92.01	89.19	86.40	78.26	72.50		Indian as per cent. of American ...
Index of relative price (average percentage of American price, 1923-28 = 100.)	100	93.3	91.9	90.4	78.4	107.7		107.7	111.7	108.3	104.9	95.0	88.0		Index of relative price (average percentage of American price, 1923-28 = 100.)

This chart shows that the main factor determining the consumption of Indian cotton in the world as a whole, apart from India, is the relation of its price to that of other growths. It does not indicate the effect of long period tendencies to substitution arising from changes in grade or staple of Indian and other growths.

Index of Indian cotton consumption outside India in relation to total consumption outside India. (Average percentage of total, August, 1923-July, 1928 = 100.)

Index of Indian cotton prices as percentage of American. (Average percentage, August 1923-July 1928 = 100.)

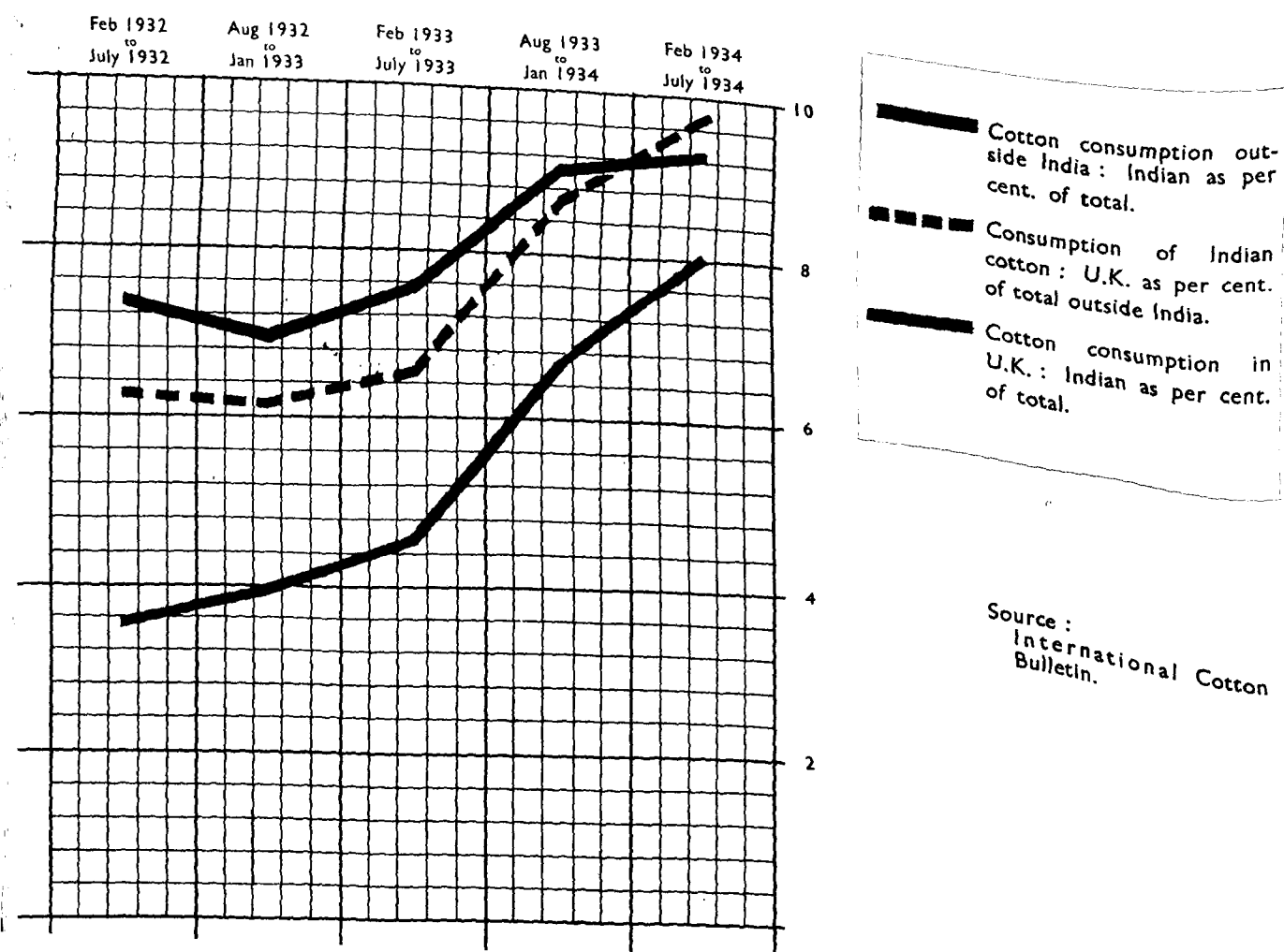
Sources : Liverpool Cotton Association Weekly Circular.
International Cotton Bulletin.
Note : Prices are Liverpool Spot prices of American Middling and Indian Fine Oomra No. 1 staple.



COMPARATIVE CONSUMPTION OF INDIAN COTTON

	Feb. 1932 to July 1932	Aug. 1932 to Jan. 1933	Feb. 1933 to July 1933	Aug. 1933 to Jan. 1934	Feb. 1934 to July 1934
Indian cotton consumed outside India as a percentage of all cotton con- sumed outside India	7.4	7.0	7.6	9.1	9.3
Indian cotton consumption in United Kingdom as percentage of total con- sumption outside India.	6.3	6.2	6.6	8.7	9.8
United Kingdom consumption of Indian cotton as percentage of con- sumption of all cotton.	3.6	4.0	4.6	6.7	8.1

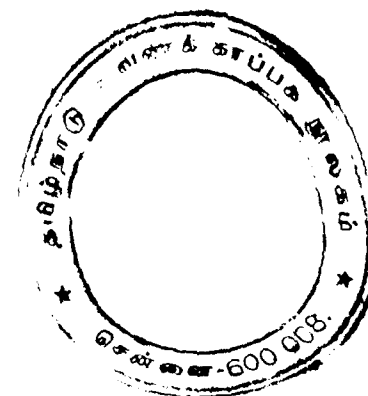
The middle curve below shows how the importance of the United Kingdom as a market for Indian raw cotton has increased during the last two years. The rise has been a steady and increasing one. By itself this might merely mean that the United Kingdom was consuming more cotton of all growths. The lowest curve shows, however, that the proportion which Indian cotton bears to the total of all cottons consumed in the United Kingdom has increased approximately at the same rate. This again by itself might be due to the change in parity of the price of Indian cotton as compared with other growths. The top curve, which illustrates a similar movement for the world as a whole shows that the price consideration is partly responsible. Since this curve rises much less steeply than that for the United Kingdom, it is clear that the increased consumption of Indian cotton in the United Kingdom must be partly due to causes other than price.



INDIA : PRODUCTION, IMPORTS AND CONSUMPTION OF COTTON PIECEGOODS

YEARS	Mill Production	Estimated Hand Loom Production	Total Indian Production	IMPORTS		Total Imports and Production	Total Exports and Re-exports	Available for Consumption	Consumption per Head of Population
				Total	From U.K.				
1910-11 to 1913-14	1,141	1,015	2,156	2,741	2,651	4,897	290	4,607	14.6
1920-21 to 1923-24	1,685	1,171	2,856	1,420	1,243	4,276	299	3,977	12.3
1924-25 to 1927-28	2,135	1,236	3,371	1,787	1,465	5,158	408	4,750	14.2
1928-29	1,893	1,032	2,925	1,937	1,456	4,862	415	4,447	13.0
1929-30	2,419	1,348	3,767	1,919	1,248	5,686	346	5,340	15.5
1930-31	2,561	1,336	3,897	890	523	4,787	279	4,508	12.9
1931-32	2,990	1,404	4,394	776	383	5,170	313	4,857	13.8
1932-33	3,170	1,716	4,886	1,225	597	6,111	277	5,834	16.3
1933-34	2,553	1,704	4,257	796	426	5,053	99	4,954	13.7

Sources: Statistics of Cotton Spinning and Weaving in Indian Mills, Accounts relating to the Sea-borne Trade and Navigation of British India, Review of the Trade of India, Indian Census of Population



LIST OF FIRMS SPINNING INDIAN COTTON AND YARNS PRODUCED

Name and Address	Range of Counts	Mule Yarn T=Twist W=Weft	Ring Yarn T=Tubes B=Beams	Other Forms
ACE MILL, Hollinwood ..	4's to 24's	T & W	—	Cones, Cheeses and Bundles.
ALBANY SPINNING CO. (1920) LTD., Middleton ..	14's to 24's	T	—	Cops.
ALBERT MILL CO. (OLDHAM), Acre, Oldham ..	3's to 16's	T	T & B	Cones and Cheeses in Single and Multiple Ends. Cross Balls, Warps and Bundles.
ARKWRIGHT MILL Rochdale ..	6's to 16's	—	T & B	Cones, Cheeses and Cross Balls.
ASH SPINNING CO. Shaw ..	2's to 24's	T & W	—	Cones, Cheeses and Bundles.
ASHTON BROS. & CO. Carrfield Mills, Hyde ..	6's to 16's	T & W	—	Cones, Cheeses and Bundles.
BARKER'S SUCCESSORS S. & A., LTD., Adamroyd Mill, Todmorden ..	4's to 16's	W	T	Cones and Cheeses.
BEE SPINNING CO. LTD. Royton ..	5's to 20's	T & W	—	Cones and Cops.
BOWKER & BALL LTD. Dukinfield ..	2's to 20's	T & W	T	Cones, Cheeses in Single and Multiple Ends and Bundles.
CARLTON SPINNING CO. LTD., Clitheroe ..	10's to 24's	W	—	Cones.
CLOVER MILL LTD. Rochdale ..	4's to 20's	T & W	—	Cones and Cheeses.
COPPULL RING SPINNING CO. LTD., Coppull ..	4's to 24's	—	T & B	Cones, Cheeses, Pirns, Bundles and Cross Balls; also Doubled Yarns in above make-ups.
COMMERCIAL MILLS SPINNING CO. (1919) LTD., Oldham ..	16's to 26's	W	—	—
CORAL MILL LTD. Newhey ..	4's to 16's	—	T & B	Cones, Cheeses, Bundles, Warps and Cross Balls; also Doubled Yarns in above make-ups.
CROFT MILL LTD. Rochdale ..	4's to 20's	T & W	—	Cones and Cheeses.
CROMPTON, A. & A., & CO. LTD., Shaw ..	8's to 16's	—	T	—
DEWHURST, GEO. & R. LTD., Preston ..	12's to 24's	T & W	T & B	—

Name and Address	Range of Counts	Mule Yarn T=Twist W=Weft	Ring Yarn T=Tubes B=Beams	Other Forms
DYSON, ELI, LTD. Victoria Mill, Farnworth ..	4's to 24's	—	T & B	Warps and Bundles.
ECKERSLEYS LTD. Wigan ..	4's to 30's	W	T & B	Cones, Cheeses, Bundles, Cross Balls and Chains.
MPRESS MILL Higher Ince, Wigan ..	4's to 16's	—	T & B	Cones, Cheeses, Bundles, Cross Balls and Chains; also Doubled Yarns in above make-ups.
ITTON, RICHARD, LTD., Oldham ..	6's to 20's	W	—	—
GOYT SPINNING CO. LTD. Marple ..	16's to 32's	W	T & B	Cheeses and Section Warps.
GRAPE MILL LTD., Royton ..	8's to 20's	T & W	—	—
GREENWOOD, WILSON Woodhouse Mill, Todmorden ..	12's to 20's	W	—	—
HARDMAN JOS. & SONS LTD., Bangor Mill, Oldham ..	4's to 20's	T & W	—	Cones, Cheeses, Bundles; also Doubled Yarn in above make-ups.
HAWK MILL, Shaw ..	8's to 24's	T & W	—	Cones and Cheeses.
HOLLY MILL LTD., Royton ..	8's to 26's	T & W	—	Cones and Cheeses.
HOLYROOD MILL CO. (1920), Oldham ..	6's to 24's	—	T & B	—
HOPE RING MILL LTD., Heywood ..	8's to 16's	—	T & B	Bundles, Cross Balls and Chains.
HORROCKSES, CREWDSON & CO. LTD., Preston ..	14's to 20's	T & W	T & B	Cones and Cheeses.
HOYLE, CALEB, LTD. Todmorden ..	6's to 18's	—	T & B	Section Warps.
KINGSTON MILLS Stockport ..	24's to 32's	—	T & B	Cheeses, Bundles, Cross Balls and Chains.
LARCH MILL, Royton ..	4's to 10's	T	—	Cones, Cheeses and Bundles.
LION SPINNING CO. LTD., Royton ..	8's to 32's	W	—	—
MAY MILL, Wigan ..	6's to 34's	—	T & B	Cheeses, Bundles, Warps, Cross Balls and Chains.
MONA MILLS (1920) LTD. Hollinwood ..	6's to 14's	T	—	—
MONS MILL, Todmorden ..	6's to 26's	T & W	T & B	Cones, Cheeses, Pirns, Bundles and Warps.
MONTON MILL, Monton ..	8's to 26's	T & W	—	Cones.
NEWBY MILL LTD., Shaw ..	8's to 28's	T & W	—	Cones.

LIST OF FIRMS SPINNING INDIAN COTTON AND YARNS PRODUCED (Cont.)

Name and Address	Range of Counts	Mule Yarn T=Twist W=Weft	Ring Yarn T=Tubes B=Beams	Other Forms
NEWROYD MILL LTD. . . Waterhead, Oldham	1's to 20's	T & W	T & B	Cones, Cheeses, Warps and Bundles; also Doubled and Cabled Yarn in above make-ups.
NUTTALL, T. & SONS LTD. Oak Mills, Farnworth	12's to 24's	—	T & B	Cones, Cheeses, Warps and Bundles.
PARK & SANDY LANE Mills, Royton	10's to 26's	W	—	Cones, Cheeses and Bundles.
PEEL MILLS LTD., Bury..	16's to 40's	T & W	—	—
ROYTON RING MILL LTD., Royton.	6's to 36's	—	T & B	Cones, Cheeses, Warps, Bundles and Cross Balls.
ROYTON SPINNING CO. LTD., Royton	4's to 24's	T & W	—	Cones and Cheeses.
RUTLAND MILL LTD. . . Shaw	6's to 28's	T & W	T & B	Cones and Cheeses.
SAXON MILL, Droylsden . .	16's to 34's	T & W	—	Cones and Cheeses.
SHILOH MILLS LTD. . . Royton	8's to 28's	T & W	—	Cones and Cheeses.
STALYBRIDGE MILL . . Stalybridge	6's to 16's	—	T & B	Cheeses, Warps and Bundles.
STANDARD MILL LTD... Rochdale	4's to 20's	T & W	—	Beams, Cones, Cheeses and Bundles; also Doubled Yarns in above make-ups.
STATE MILL LTD. . . Rochdale	4's to 26's	T & W	—	Cones and Cheeses.
TAYLOR & BRO. LTD. . . Victoria Mills, Wigan	8's to 24's	W	T & B	Cones and Cheeses.
THORNHAM SPINNING CO. LTD., Royton	10's to 16's	W	—	—
VINE MILL CO. (ROYTON) LTD., Royton.	6's to 20's	T & W	—	—
WELKIN MILL, Stockport..	28's to 40's	—	T & B	Bundles and Cross Balls.
WHITELEY, GEO., & CO. LTD., Albion Mills, Blackburn	6's to 13½'s	T & W	B	Cheeses and Warps; also Doubled Yarns in above make-ups.
WILTON MILL, Radcliffe..	8's to 20's	T & W	—	—

FIRMS SPINNING CONDENSER YARNS FROM INDIAN COTTON

Name and Address	Range of Counts	Mule Yarn T=Twist W=Weft	Ring Yarn T=Tubes B=Beams	Other Forms
FAIRLEA MILL CO. LTD. Luddendenfoot	1½'s to 9's	W	—	—
NORTHERN COARSE SPINNERS LTD., Wigan	1's to 8's	T & W	—	Cones, Cheeses and Bundles; also Doubled Yarns in above make-ups.
PIMHOLE MILLS CO. LTD. Bury	2's to 8's	T & W	—	Cops, Cones, Cheeses and Bundles.
QUILT MANUFACTURERS LTD. (James Lomas Ltd.) Lower Wellington Mills, Stockport	1's to 3½'s	T	—	Jumbo Cops and Bundles
RHODESON LTD. Crawshawbooth	3's to 8's	W	T & B	Cones, Cheeses and Bundles.

The names appearing in these and other lists have been supplied by the firms concerned, in response to a public announcement and are not printed as necessarily comprehensive.

MANUFACTURERS USING INDIAN COTTON

Abbey Carr & Woodfold Mills Ltd., Withnell. (Enquiries to Wm. Birtwistle, 10 Charlotte Street, Manchester 1).
 Ashton Bros. & Co. Ltd., Carrfield Mills, Hyde.
 Birtwistle, J. H. & Co. Ltd., Grane Road Mill, Haslingden.
 Birtwistle, Wm., 10 Charlotte Street, Manchester 1.
 Blackledge, J., & Son, Park Mill, Chorley, Lancs.
 Burrows Ltd., Emerson Road Mills, Preston.
 Darwen Cotton Manufacturing Co. Ltd., Bowling Green Mill, Darwen.
 Dean Brothers Ltd., Padiham.
 Dewhurst, Geo. & R., Ltd., 201-2 Royal Exchange, Manchester 2.
 Eastwood, H., & Co. Ltd., Scotland Bank Mill, Blackburn.
 Eccles, T. & R., Ltd., Lower Darwen. (Enquiries to Wm. Birtwistle, 10 Charlotte Street, Manchester 1.)
 Elliott, J. E., Ltd., Holme Mill, Nelson, Lancs.
 Entwistle, Robert, & Co. Ltd., Lincoln Mill, Bolton.

Fairlea Mill Co., Luddendenfoot.
 Fish, John, Ltd., Blackburn. (Enquiries to Wm. Birtwistle,
 10 Charlotte Street, Manchester 1.)
 Fothergill & Harvey Ltd., Littleborough.
 Foulisykes Manfg. Co. Ltd., Clitheroe.
 Gerrard, Thos., & Sons Ltd., Adlington Mills, Adlington, nr. Chorley.
 Gillibrand, Thos., & Sons Ltd., Hollins Grove Mill, Darwen.
 Glebe Mills Ltd., Westhoughton, near Bolton.
 Green, George, & Co. Ltd. (Padiham), 37 York Street, Manchester 1.
 Greg Brothers & Co. Ltd., 1 Booth Street, Manchester 2.
 Grey, John, Ltd., Livingstone Mill, Burnley.
 Harwood Prospect Mill Co., Ltd. Great Harwood.
 Hawkins, John, & Sons Ltd., Greenbank Mills, Preston. (Enquiries
 to Wm. Birtwistle, 10 Charlotte Street, Manchester 1.)
 Holden, George, Ltd., Paterson Street Mill, Blackburn.
 Holden & Hitchon Ltd., Padiham.
 Hoyle, Caleb, Ltd., Derdale Mill, Todmorden.
 Lancashire Cotton Corporation Ltd., Blackfriars House, Manchester.
 Mather Bros. & Co. Ltd., Hapton, near Burnley.
 Nelson, James, Ltd., Valley Mills, Nelson, Lanes.
 Olive Bank Manufacturing Co. Ltd., Woolfold Mills, Bury.
 Pemberton's Ltd., Clover Mill, Nelson.
 Pollard Walter, (1923) Ltd., Malvern & Brook St. Mills, Nelson.
 Quilt Manufacturers Ltd., 107 Portland Street, Manchester 1, com-
 prising:—
 Bond, Henry, & Co. Ltd., Bolton.
 Dearden, Jonathan, & Co. Ltd., Bolton.
 Johnson, J., Hodgkinson & Pearson Ltd., Bolton.
 Kippax, James, & Sons Ltd., Bolton.
 Lomas, James, Ltd., Lower Wellington Mills, Heaton Lane,
 Stockport.
 Phethean, John, & Co. Ltd., Bolton.
 Simpson & Baldwin Ltd., Albion Mills, Burnley.
 Smith, J. R., & A., Ltd., Manchester Mill, Preston.
 Sunnybank Weaving Co. Ltd., Kirkham, near Preston.
 Sutcliffe & Clarkson Ltd., Wiseman Street Mill, Burnley.
 Tattersall & Hargreaves Ltd., Lockgate Mill, Haslingden.
 Taylor & Hartley Ltd., Perseverance Mill, Westhoughton.
 Thornber, B., & Sons Ltd., Danes House Mill, Burnley.
 Thornber, Luke, Dean Shed, Burnley.
 Walton, John, & Son, New Hall Shed, Burnley.
 Westhead, Wm., Ltd., Salford Bridge Mill, Clitheroe.
 Whipp Brothers Ltd., Cotton Hall Shed, Darwen.
 Whitaker, O., & Sons Ltd., Oak Bank Mills, Burnley.
 Whiteley, George, & Co. Ltd., Albion Cotton Works, Blackburn.
 (Enquiries to Wm. Birtwistle, 10 Charlotte St., Manchester 1.)

PRODUCTS MADE FROM INDIAN COTTON

Apron Cloths	Drabbets	Osnaburgs
Austrias	Dress Goods	Overall Cloths
Awning Cloths	Dressing Gown Cloths	Paramattas
Bafts	Drillettes	Pillow Cottons
Bag Cloths	Drills	Pocketings
Bath Mats	Ducks	Polishing Cloths
Bath Sheets	Dungarees	Printers
Batistes	Dusters	Prints
Beatrice Twills	Dyed Fancies	Pyjama Cloths
Bedford Cords	Embroidery Cloth	Quilts
Bedspreads	Filter Cloths	Regattas
Blankets	Flannelettes	Repps
Bleachers	Floor Cloths	Ripples
Bleaching Stripes	Florentines	Royal Ribs
Blouse Cloths	Furnishing Cloths	Sail & Tent Cloths
Book and Book- binders' Cloths	Gaberdines	Sarongs
Brocades	Galateas	Sateens
Butter Cloths	Ginghams	Scarves
Cabots	Haircords	Scourers
Calicoes	Hammock Cloths	Scrims
Calicots	Handkerchief Cloths	Shawls
Cantons	Hollands	Sheetings
Cantoons	Honeycombs	Sheets
Canvas	Huckaback	Shirtings
Casement Cloths	Indianas	Shirts
Cashmeres	Interlinings	Shoe & Slipper Cloths
Cheese Cloths	Italians	Sicilians
Cheshire Plains	Jacconnettes	Siliesias
Cleaning Cloths	Jaspe	Splits
Coatings	Jeans	Sponge Cloths
Collar Cloths	Kaffir Sheets	Stockinette
Condenser Cloths	Kitchen Cloths	Surgical Cloths
Cords	Laundry Cloths	T-Cloths
Corset Cloths and Coutils	Limbrics	Table Cloths
Costume Cloths	Linenettes	Tanjibs
Cotton Lappings	Linings	Tickings
Counterpanes	Longcloths	Towels and Towelling
Crash	Marocains	Tropical Suitings
Crepes and Crepons	Meat Wrappers	Trouserings
Cretonnes	Medical and Surgical Cottons	Tussore
Crimps	Mediums	Twills
Croydons	Mexicans	Umbrella Cloths
Curtain Cloths	Moireens	Upholstery Cloths
Denims	Moleskins	Warp Satins
Dhooties	Molletons	Waterproofing Cloths
Diagonals	Moreens	Whipcords
Domestics	Muslins	Wigans
Dometts	Nainsooks	Winceyettes
Doria Stripes	Nurse Cloths	
Downproofs		

SUPPLIERS OF INDIAN RAW COTTON

(A) IN INDIA.

(List furnished by the East India Cotton Association, Bombay.)

Anandilal Podar & Co.	Khoja Mithabhai Nathoo
Anderson, Clayton & Co.	Kilachand Devchand & Co. Ltd.
Anglo-Siam Corporation Ltd.	Kotak & Co.
Arjan Khimji & Co.	Langley & Co.
Bhagwandas Harakchand & Co.	Madhavdas Amersey & Co.
Bhaidas Cursonadas & Co.	Mahomed Suleman & Co.
Bhaidas Mawji & Co. Ltd.	Narandas Rajaram & Co.
Birla Brothers Ltd.	Narsee Nagsee & Co.
Bombay Company Ltd.	Nissho Company Ltd.
Breul & Co.	Patel Cotton Co. Ltd.
Chrystal P. & Co.	Pirojshaw R. Vakharia & Co.
Fatehally N. & Co.	Ralli Brothers Ltd.
Gill & Co.	Shamji Karamsey & Co.
Goculdas Dossa & Co.	Shivchandrai Jhunjunwala
Gosho Kabushiki Kaisha Ltd.	Spinner E. & Co.
Hirji Nensey & Co.	Toyo Menka Kaisha Ltd.
Japan Cotton Trading Co. Ltd.	Usman Suleman & Co.
Kanji Shivji & Co.	Viram Ladha & Co.
Karsondas Narandas	Virji Ladha & Co.
Khimji Visram	Volkart Brothers

(List furnished by the Karachi Cotton Association, Karachi.)

Amersey Damoder	Karachi Cotton Co.
Amersey & Sons	Khoja Mithabhai Nathoo
Anandilal Podar & Co.	Kilachand Devchand & Co. Ltd.
Arjan Khimji & Co.	Kotak & Co.
Bhagwandas, H., & Co.	Langley & Co.
Bhaidas Cursonadas & Co.	Madhavdas Amersey & Co.
Bhaidas Mawji & Co. Ltd.	Narandas Rajaram & Co.
Bombay Co. Ltd.	Patel Cotton Co. Ltd.
Breul & Co.	Ralli Brothers Ltd.
Chachaty & Thakersi Ltd.	Shimwell & Brothers Ltd.
Dhanpatmal Diwanchand	Spinner E. & Co.
Diab A. H.	Toyo Menka Kaisha Ltd.
Gill & Co.	Tulshan S. R. & Co.
Gosho Kabushiki Kaisha Ltd.	Vakharia R. & Co.
Hirjee Nensee & Co.	Viram Ladha & Co.
Japan Cotton Trading Co. Ltd.	Volkart Brothers

(B) IN THE UNITED KINGDOM

(List furnished by the Liverpool Cotton Association.)

Babcock, B. F. & Co., 1 Old Hall Street, Liverpool.
 Bakewell, J. H. & Co., 28 Exchange Alley, Liverpool.
 Buchanan, Wignall & Co., 126, 131, 132 and 137 Cotton Exchange Buildings, Liverpool; also 107 Royal Exchange, Manchester 2.
 Burns, R. Donald, Orleans House, Edmund Street, Liverpool.
 Buston, A. J. & Co., 48 Cotton Exchange Buildings, Liverpool; also 25 Cross Street, Manchester 2.
 Decker, Crump & Bennett, City Buildings, 23 Old Hall Street, Liverpool; also 119A Royal Exchange, Manchester 2.
 Decker, H. J. & Co., 19 Old Hall Street, Liverpool.
 Fairclough, Jones & Co., Empire Buildings, Fazakerley Street, Liverpool.
 Fothergill & Co., Berey's Buildings, George Street, Liverpool; also 447-9 Royal Exchange, Manchester 2.
 Fox, W. G. & Co., Orleans House, Edmund Street, Liverpool.
 Glazebrook, P. N., City Buildings, 23 Old Hall Street, Liverpool.
 Grace Cotton Co. Ltd., 39 and 41 Old Hall Street, Liverpool; also 101 Royal Exchange, Manchester 2.
 Hannay, A. & Co., 14 Chapel Street, Liverpool.
 Hooper, H. W. & Co., 38 Cotton Exchange Buildings, Liverpool.
 Japan Cotton Trading Co. Ltd., 4 Old Hall Street, Liverpool.
 Kelly, George & Co., 151/2 Cotton Exchange Buildings, Liverpool.
 Lancashire Cotton Corporation Ltd., 94/102 Cotton Exchange Buildings, Liverpool; also Blackfriars House, Parsonage, Manchester 3.
 Langley, George & Co., Orleans House, Edmund Street, Liverpool.
 Lee & Lea, 9 Legal and General Assurance Buildings, Silkhouse Lane, Liverpool; also 229 Royal Exchange, Manchester 2.
 Longmore Brothers, 19 Old Hall Street, Liverpool; also 311 Royal Exchange, Manchester 2.
 McGregor & Co., 56/58 The Albany, Old Hall Street, Liverpool.
 Merrifield, Ziegler & Co., Empire Buildings, Spellow Place, Liverpool; also 32 Barton Arcade, Manchester 3.
 Metcalfe, H. W. & Co., 19 Old Hall Street, Liverpool; also Midwood, W. H., 57/67 Cotton Exchange Buildings, Liverpool; also Royal Exchange, Manchester 2.
 Milligan & Mackintosh, Berey's Buildings, George Street, Liverpool; also 25 Royal Exchange, Manchester 2.
 Molyneux, Taylor & Co., 142/8, 174 The Albany, Old Hall Street, Liverpool; also 20 Victoria Buildings, Manchester 2.
 Nicholson & Wrigley, 103/110 Cotton Exchange Buildings, Liverpool.
 Overton, T.H. & Co., 1 Empire Buildings, Fazakerley Street, Liverpool.
 Ralli Brothers, Orleans House, Edmund Street, Liverpool.
 Reynolds & Gibson, 30 Exchange Street, Liverpool; also 203-4 Royal Exchange, Manchester 2.
 Rye, Evans & Co., 1 Bixteth Street, Liverpool; also 2 Bank Street, Manchester 2.
 Scott, W. P. & Co., 127/130 Cotton Exchange Buildings, Liverpool; also 542 Royal Exchange, Manchester 2.
 Shand, Higson & Co., 30/31 Exchange Alley, Liverpool; also 227 Royal Exchange, Manchester 2.

Smith, Coney & Barrett, Lombard Chambers, Ormond Street, Liverpool.
 Smith, Rathbone & Co., City Buildings, Old Hall Street, Liverpool;
 also 4 Royal Exchange, Manchester 2.
 Stern, M. & B., Orleans House, Edmund Street, Liverpool; also 114
 Royal Exchange, Manchester 2.
 Strauss & Co., 11 Old Hall Street, Liverpool; also 200 Royal Exchange,
 Manchester 2.
 Stubbs & Grindrod, Orleans House, Edmund Street, Liverpool.
 Volkart Brothers, 96/98 Leadenhall Street, London.
 Walker, Dunstan & Co., 11 Tithebarn Street, Liverpool; also 315-317
 Royal Exchange, Manchester 2.
 Whineray, Brady & Co., Orleans House, Edmund Street, Liverpool;
 also 205 Royal Exchange, Manchester 2.
 Williams, Wilson & Co., Orleans House, Edmund Street, Liverpool;
 also 433 Royal Exchange, Manchester 2.
 Witter & Pearson, 23 Irwell Chambers East, Fazakerley Street,
 Liverpool; also Exchange Chambers, Bull's Head Yard, Man-
 chester 4.
 Wolstenholme & Holland, 9 Tithebarn Street, Liverpool.
 Woods & Thorburn, 39 and 41 Old Hall Street, Liverpool; also 34/5
 Barton Arcade, Manchester 3.
 Woodward & Co., 20 Hackins Hey, Liverpool.

(List furnished by the Manchester Cotton Association.)

Arnhold & Co. Ltd., 73 Whitworth Street, Manchester 1.
 Beer, Cowell & Co., 30 Cross Street, Manchester 2.
 Bottomley, Wm. & Son (M/c.) Ltd., 1 Victoria Buildings, Manchester 1.
 Bounphrey & Co., 3 Cromford Court, Manchester 4.
 Bridge, Audley & Co., 516/519 Royal Exchange, Manchester 2.
 Butterworth, E. & Co. Ltd., Pollard Street, Manchester 4.
 Cook & Thorp Ltd., 2 Bank Street, Manchester 2.
 Dearnaley, A. & Co., 123 Royal Exchange, Manchester 2.
 Dickinson, J. A. & Co., 3 Rumford Place, Liverpool.
 Eccles, Alexander & Co., 5 Cross Street, Manchester 2.
 Fothergill & Co., 447 Royal Exchange, Manchester 2.
 Glazebrook, Steel & Co. Ltd., 8 Chepstow Street, Manchester 1.
 Hayes, J. E. & Co., Central Street, Deansgate, Bolton.
 Hobson Bros. & Co., 15 Cross Street, Manchester 2.
 Jones, William C. Ltd., 203/219 Collyhurst Road, Manchester 9.
 Lancashire Egyptian Cotton Co. Ltd., Guardian Buildings, Manchester 2.
 Leonard & Co., 19 Hackins Hey, Liverpool.
 Manchester Raw Cotton Co. Ltd., 305 Royal Exchange, Manchester 2.
 Mayall & Turner, 6 St. Ann's Square, Manchester 2.
 Morris & Wilson, 546 Royal Exchange, Manchester 2.
 Phillips, F. & Co., 96 Deansgate, Manchester 3.
 Ralli Brothers, Orleans House, Liverpool.
 Reinhart & Co. Ltd., 25 Cross Street, Manchester 2.
 Robinson, Armour & Co., Lloyds Bank Buildings, Manchester 2.
 Smith, J. & Co., 420/6 Royal Exchange, Manchester 2.
 Spinner, E. & Co., Dominion House, Whitworth Street, Manchester 1.
 Weld & Co., 330/2 Royal Exchange, Manchester 2.

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