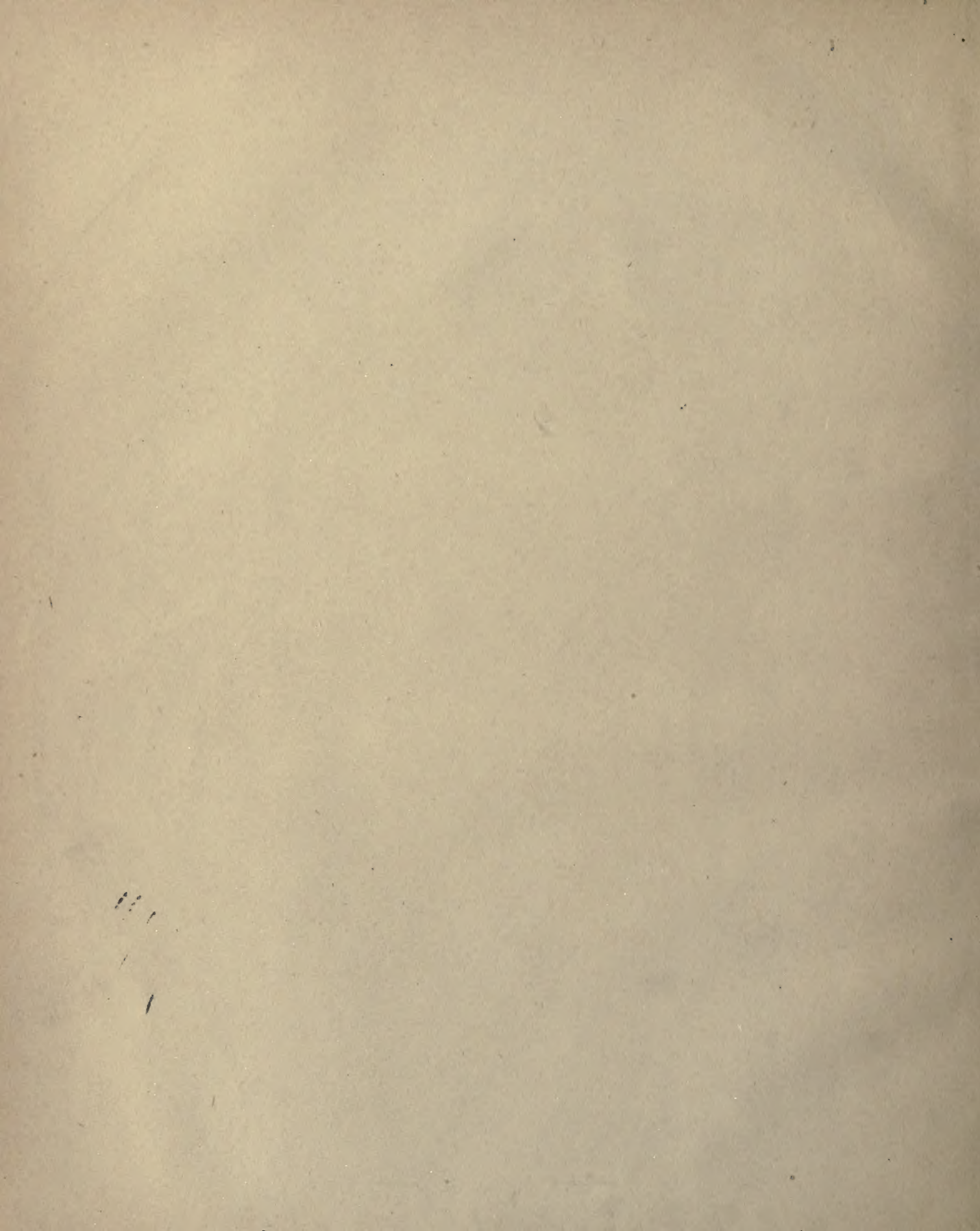




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REPORT

OF

The Tariff Commission

Vol. 5

THE POTTERY INDUSTRIES

WITH ANALYSIS AND SUMMARY OF EVIDENCE
AND STATISTICAL TABLES

London

PUBLISHED FOR THE TARIFF COMMISSION,

BY

P. S. KING & SON

Orchard House, 2 & 4, Great Smith Street, Westminster, S.W.

1907



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McCORQUODALE & Co. LIMITED, Printers, London.

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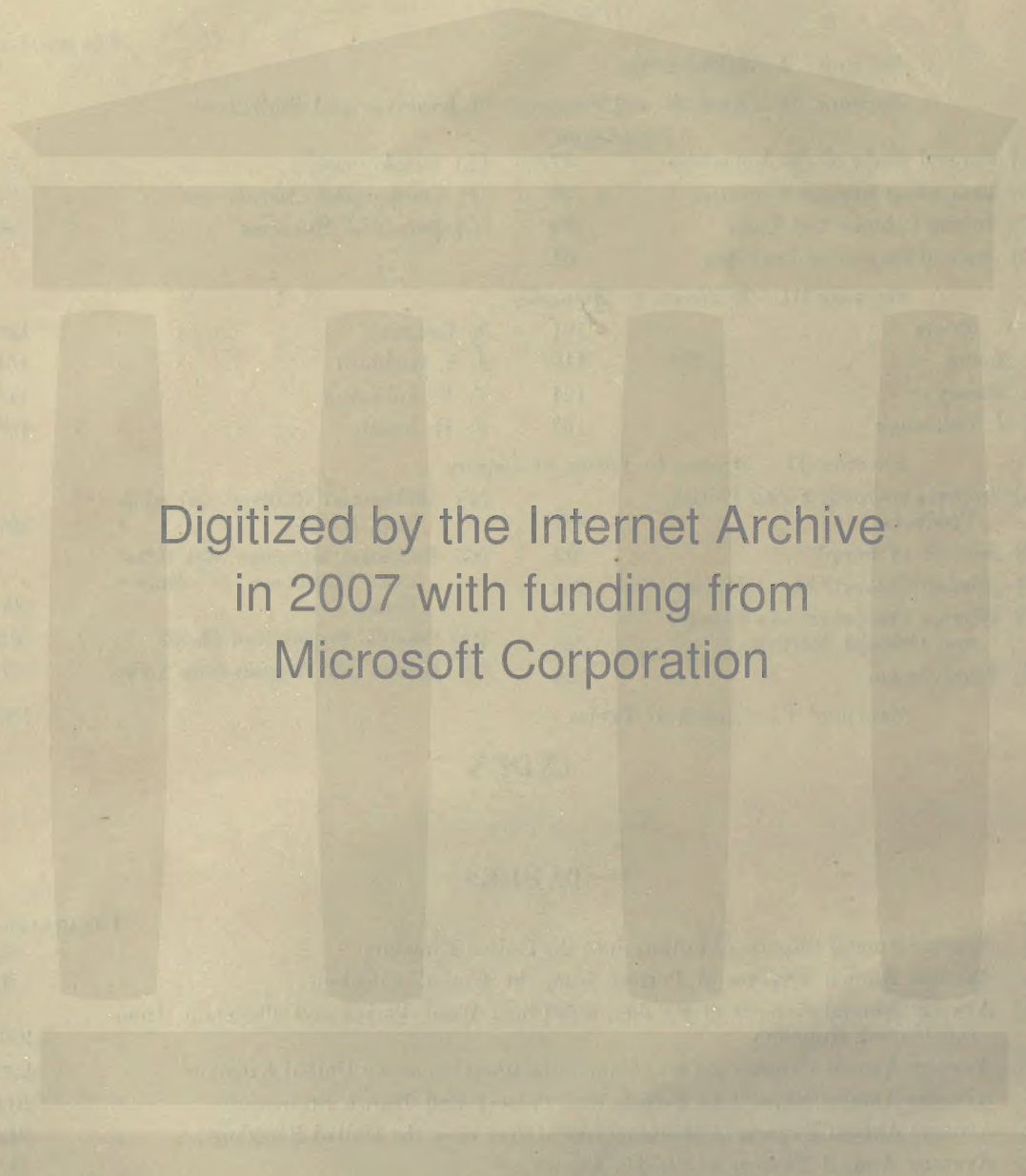
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THE POTTERY INDUSTRIES*

SECTION I—INTRODUCTION

The following is a succinct statement of the main points elucidated in this volume :—

(1) There are no official figures of the output of the British pottery industry, but the estimate most generally accepted in the trade shows an annual value of £5,550,000, of which about £2,250,000 represents the average value of exports over a series of years, and about £3,300,000 home trade. **Output**

(2) It is agreed that the world's use of pottery ware has undergone great expansion in recent years, especially in connection with the progress of the electrical industries, the improvement of sanitation, &c. The evidence shows, however, that the British pottery industry has not only not expanded accordingly, but has failed to keep pace with the home demand.

(3) Foreign pottery manufacturers are largely dependent upon British clays ; and, while the export of British pottery manufactures has undergone practically no increase, despite the greatly enlarged use of pottery, the export of this British raw material to foreign pottery manufacturers has more than quadrupled in the last 30 years. **Raw Materials.**

(4) The British export trade has remained practically stationary for the last 25 years, while the export trade of the chief foreign competitors has shown great increase. Thus the German export trade, which was of the value of less than £3,000,000 eight years ago, has risen steadily, and is now over £5,000,000, the increase being 71 per cent. The French export trade has, in 10 years, risen 50 per cent., from £1,000,000 to £1,500,000 sterling. The Austrian export trade has in 10 years increased from £668,000 to £1,248,000, or 87 per cent. **Exports**

(5) The United States continues to be the chief export market for the British industry. British exports to that country have, however, declined, especially since the imposition of the McKinley and Dingley tariffs ; the decline in the last 15 years has been 40 per cent. German exports to the United States have, on the other hand, increased 160 per cent. in the last six years, and now exceeds £1,500,000, as against British exports of little more than £500,000. British witnesses expect that under cover of their tariff advantages United States manufacturers will, in a short time, be able to meet practically the whole of their home demand. **4**

(6) British exports to Germany have fallen away from the average of the seventies, and are now considerably below the average of the last ten years.

* The term "Pottery" as used in this Volume includes Earthenware, China, Parian, Porcelain, Red Pottery, Brown Stone Ware, Bricks, Clay Manufactures, Electrical and Door Fittings.

5 (7) The British Colonial markets rank next in importance to the United States. In the case of Canada, the increase has been 100 per cent. in the last 25 years; it is especially marked since the establishment of Preference, and the trade now exceeds £250,000. In the case of Australia, where there is no Preference, there is a heavy decline. South Africa, where there is a Preference, now approaches other self-governing Colonies in importance as a market for British pottery.

6 (8) The increasing hold of foreign pottery manufacturers upon British Colonial markets is indicated by the fact that in porcelain tableware (coloured, gilded, &c.) alone German sales in Canada, Australasia, South Africa and India show an increase from £88,000 in 1898 to £143,000 in 1904, or over 60 per cent. This increase has taken place in spite of the deterrent effect of the Canadians' sartax on German goods. Austria, also, sent £22,000 worth of porcelain ware to Australasia in 1905, whereas 10 years ago she sent none. Staffordshire manufacturers say that they formerly had sole control of the Australian trade; the Germans have now made "great inroads," and some Australian merchants admit that they now "sell more German china than English."

(9) British exports to South American markets show an upward tendency, and the increase in the case of the Argentine is most marked in the last two or three years. Germany would also seem to be most successful in her South American trade.

Imports

7 (10) The most disturbing influence in the British industry has been the steady increase in the importation of foreign pottery in the last 25 years. The imports have nearly doubled in that period, the chief increases being in imports from Germany—the imports of Holland are also chiefly of German origin. Making allowance for the German importations through Holland, and taking the corrected figures of 1905 as a rough guide, it appears that Germany imports about five times as much pottery into the United Kingdom as she did 30 years ago. Austria has increased her exports to the United Kingdom twelvefold in 10 years, from £24,000 to £279,000; while French pottery sales in the United Kingdom now represent £240,000, as against £154,000 in 1895, an increase of 56 per cent.

8 (11) The feature of this foreign competition in British home markets, of which the greatest complaint is made in the evidence of manufacturers, is the sale of imported pottery regardless of cost price. Instances are given in which German manufacturers, having their own home market secure, disposed of their surplus production at "less money than the British manufacturer pays for labour alone upon similar articles." This foreign "dumping" is frequently coupled with the piracy of British designs, and the effect upon British trade is often disastrous.

Employment

(12) The labour value of pottery imports upon British employment is estimated by manufacturers in evidence as being equivalent in wages to working potters, potters' millers, fire-brick makers, and so on, of something like £7,000 a week.

(13) The actual state of employment in the pottery industry is indicated by the assertions: (a) That workers have suffered to the extent of 25 per cent. in their wages because of short time for some years past, and (b) that despite the greatly increased use of pottery ware there are considerably

fewer workpeople employed in some of the districts now than 20 years ago. Allowing for the effect of the greater use of machinery, it is generally agreed that foreign competition, and especially dumping, keep the output of some of the factories down to one-half of their capacity.

(14) The McKinley and Dingley tariffs and the consequent closing of the United States' market to many classes of British pottery are pointed to as a cause of decreased British exports and lessened British employment, and specific illustrations of losses due to their tariffs are given.

Effect of Foreign Tariffs

(15) Foreign tariffs are also indicated as a prime cause of the establishment of British pottery firms in Germany and the United States, and the emigration of skilled British workmen to those countries. Thus one large Staffordshire earthenware firm is said to have invested £50,000 in Germany.

(16) Much is said in the evidence as to the consequences of increasing Japanese competition in the near future, especially in view of the abnormally low wage basis, in some classes of labour 4d. a day, upon which Japanese makers work. Japan now sends half her pottery exports to the United States, and there have been substantial increases in Japanese exports to Canada and Australia. Japan's total pottery exports were of the value of £532,000 in 1905, an increase of 144 per cent. over the 1899 figure.

Japan

(17) Those concerned in the industry, both as employers and employed, are practically unanimous as to the need of a change in the British fiscal system (a) to safeguard the home market against unfair foreign competition, (b) to permit of negotiations for better terms in foreign markets, and (c) to secure by mutual preference a development of trade within the Empire. The detailed suggestions in the way of remedial measures are set out in the evidence and are summarised in paragraphs 96-98.

Suggested Remedies

SECTION II—ANALYSIS AND SUMMARY OF EVIDENCE AND STATISTICS

The following is an analysis and summary of the actual statements of Witnesses and of Firms responding to the Forms, without comment of any kind by the Commission. The summary retains throughout the words of the Witnesses and Firms, and therefore expresses their views on the state of the industry. The summary has been compiled on the same method as that already described in the case of other trades (*See Cotton and other Reports*).

The detailed statements of Witnesses and Firms upon which the summary is based are published in Sections III. and IV. of this volume.

(A) GENERAL STATE OF THE INDUSTRY.

Character and
Distribution of
the Industry

The British pottery industry is for the most part concentrated in what is known as the Potteries district of Staffordshire, and is, speaking roughly, distributed as follows:—

Names of Areas.	Class of Goods chiefly made.
Hanley, Stoke-on-Trent and Burslem	China, Earthenware, Tiles and Sanitary Ware.
Tunstall	Earthenware, Tiles, Sanitary Ware.
Fenton	China, Earthenware.
Longton	China, Earthenware (principally China).

Bristol and parts of Devonshire are also centres of some branches of pottery manufacture as the evidence in this volume shows. The manufacture of china and earthenware is also carried on in the following districts:—London, Glasgow, Etruria, Leeds, Newcastle-on-Tyne, Bristol, Derby, Paisley, Greenock, Chesterfield, Stockton-on-Tees, Kilmarnock, Castleford, Hereford, Tamworth, Chester, Ruabon, Poole, Bideford, Thornaby-on-Tees, Swadlincote, Kingswinford, Broseley, Bridgend, Corntown (near Bridgend), Bovey Tracy, Belleek (Ireland), Coalport, Jackfield (Salop), Burton-in-Lonsdale, Brierley Hill, Church Gresley, Woodville, Kirkcaldy, Boness, Buckley, and Clifton Junction.

The yearly output of the pottery industry proper—that is to say, of china, earthenware and pottery factories—is valued by one witness at £5,550,000; another witness gives an estimate of £8,000,000, but the consensus of opinion is in favour of the lower figure. Of this total about £2,250,000 represents exports over a series of years. One witness divides the home trade into one-tenth china and nine-tenths earthenware and other pottery; and manufacturers of china say that their branch of the trade has to bear the competition of quite half of the imports. The importation of common china is said to be even greater than the British output.

General State of
Trade

The increase in the world's use of pottery ware should, it is urged, have led to a large expansion of both the home and export trade. The evidence, however, shows that the English pottery industry fails to keep pace with the home demand; the volume of imports grows year by year and the export trade is increasingly hampered by tariffs. The capacity of many of the Staffordshire factories is said to be double their present production, employment is irregular and net profits have greatly fallen away—one witness speaks of them as “utterly absent in the case of the majority of manufacturers in the china trade.” And this is so in spite of the increased adaptation of pottery in many ways in recent years. Says one witness: “There were no such things as electrical fittings a few years ago. What we call the door furniture trade was known, in my younger experience, as making

earthenware wheels for arm chairs, number plates, door plates and things of that kind. But now that has developed into an enormous industry for all kinds of electrical fittings. In the same way the sanitary business in my younger days was a comparatively small one. There was one small factory in the Potteries. It has now increased to an enormous industry, not only in the Potteries but all over the country. So that when we say that we have a small increase, it is true, but we ought to have had a very large increase, because the development in the pottery industry has been so enormous."

Finding no adequate opportunities of expansion in England some British manufacturers have established works on the Continent from which to supply both Continental and British home and Colonial markets. The evidence states that two large British firms of sanitary ware makers have recently established works in Germany. One large Staffordshire earthenware firm who has erected works in Germany is said to have invested £50,000 there, and mention is made of efforts to get within the United States tariff by establishing works there.

Transfer of Capital
and Labour to
Foreign Countries

The increased importation of competing foreign goods generally sold here at prices below and often very much below the cost of British production is pointed to in the evidence as the chief cause of the unsatisfactory condition of the British industry. The official figures may be summarised as follows :—

Imports

TABLE 1.—AVERAGE ANNUAL IMPORTS OF POTTERY INTO THE UNITED KINGDOM
(IN THOUSANDS OF £).

Table 1

	1875-79	1880-84	1885-89	1890-94	1895-99	1900-04	1905	1906†
Germany	109	103	210	239	275	384	341*	—
Holland	34	183	140	210	255	254	329	—
France	174	146	128	113	228	258	169	—
Other Foreign Countries ...	87	123	77	75	81	82	71	—
Total from Foreign Countries	404	555	555	637	839	978	910	—
Total from British Possessions	—	—	10	5	5	6	4	—
Total from all Countries ...	404	555	565	642	844	984	914	950
Re-exports	34	73	60	38	115	218	125	105
Net Total from all Countries	370	482	505	604	729	766	789	845

It will be seen that the importation of foreign pottery has increased steadily in the last 25 years and is now more than twice as much as it was in 1875-79. About 8 per cent. of the total imports was re-exported in the period 1875-79; the proportion re-exported was 22 per cent in 1900-04. Of the total imports Germany and Holland together supplied two-thirds as compared with rather more than one-third only in 1875-79. Though Holland appears separately in these figures to the extent of 25 per cent. of the total imports, the corrected figures for 1904 supplied by the Board of Trade show that the pottery we import from Holland is nearly all German, only £30,000 worth out of a total

* For the official German figures, see para. 348.

† As far as figures are at present available.

of £314,000 being Dutch pottery. The pottery imports from France declined considerably in the middle of the period under review, but were, in 1901-04, nearly 50 per cent. more than in 1875-79, and 130 per cent. more than in 1890-94. Practically all the imports from France are of French origin.

The character of the imports is dealt with in detail under each heading in subsequent sections of this Summary, *e.g.*, "Competing Foreign Countries," and "State of the Several Branches."

Exports

The exports of all classes of pottery are seen to have practically remained stationary during the last 25 years. To foreign countries since 1880 there has been a decline of about 20 per cent., which has been made up to a considerable extent by increased exportation to the Colonies. For detailed official figures see paragraph 337 *et seq.*

Table 2

TABLE 2.—AVERAGE ANNUAL EXPORTS OF POTTERY FROM THE UNITED KINGDOM.
(IN THOUSANDS OF £).

	1875-79	1880-84	1885-89	1890-94	1895-99	1900-04	1905	1906*
Russia	43	33	28	40	103	67	41	—
Germany	101	65	64	54	94	96	78	78
France	95	136	96	82	85	78	71	60
U.S.A.	621	880	840	890	721	574	521	572
Brazil	115	109	82	98	87	75	108	120
Argentina	23	40	94	55	51	70	139	185
Other Foreign Countries ...	482	455	335	332	344	447	492	—
Total to Foreign Countries	1,480	1,718	1,539	1,551	1,485	1,387	1,450	—
South Africa	42	49	43	63	108	179	156	112
India	110	139	120	121	91	108	124	161
Australia	220	294	262	185	188	208	167	179
Canada	102	115	146	138	151	199	221	252
Other British Possessions ...	50	67	110	124	136	184	217	—
Total to British Possessions	524	664	681	631	674	878	885	—
Total to all Countries ...	2,004	2,382	2,220	2,182	2,159	2,265	2,336	2,383

The largest market for British pottery is the United States; exports to that market amounted to £880,000 per annum in 1880-84 and £890,000 in 1890-94, but have since fallen to £574,000 in 1900-4 and still further to £521,000 in 1905. The largest Colonial markets are Australia, Canada and India. The increase in trade with Canada is equivalent to 100 per cent. in the 25 years, and is especially marked during the last 10 years. In the case of Australia there has been a persistent decline in the last 20 years of more than 40 per cent., marked by a still further heavy decline in 1905. South Africa has of recent years been an important market.

Export of Raw Material

While the export of pottery manufactures has been practically stagnant during the last 25 years, the export of unmanufactured clay for the uses of foreign pottery makers has largely increased. The evidence shows that American, and in some measure also Continental, manufacturers are dependent more or less on English clays for the making of their earthenware. "The United States for one class of clay—ball clay—which is absolutely essential for the manufacture of earthenware is entirely dependent on supplies from this country. They have clays suitable for making china, but not for making

* The 1906 figures are exclusive of bricks. † The 1906 total as above of £2,383,000 compares with £2,098,000 in 1905, and £2,106,000 in 1904.

earthenware, though, as a matter of fact, not much china is made in America." More than four times as much clay is now exported as compared with thirty years ago, and is now of the value of £586,000. About two-fifths of the total represents exports to the United States, which country bought £239,000 of English clay in 1905, as against £13,000 in 1875-9. This large increase in the export of unmanufactured clay to the United States has synchronised with the decreased market for British pottery in that country, to which reference has already been made.

29

The inadequacy of the Board of Trade returns is frequently referred to in the evidence. The complaint is that the official figures fail to follow the accepted trade classification; they supply a basis for the statistical examination of the import and export trade as a whole but, unaided by other authoritative information, they throw little light upon the state of the various branches or the changes that are taking place in the organisation of the trade. Thus it is pointed out that the official returns make no distinction between common and better-class china, and that in the figures up to 1904 china ware is indistinguishable from earthenware. A Staffordshire witness asserts that Longton manufacturers agree that nine-tenths of the importations officially described as "china and earthenware" are china only.

Inadequacy of
Official Returns

30

(B) COMPETING FOREIGN COUNTRIES.

GERMANY.

It is to Germany that most frequent reference is made in the evidence on foreign competition. The progress and extent of the German industry is illustrated by the list of German pottery products imported into the United Kingdom as set out in paragraphs 197-8, and the evidence generally shows that only in a few branches do German manufacturers fail to encroach more or less severely upon the British manufacturer in home, foreign and Colonial markets. They have made a complete and careful study of these markets, and under the stimulus of a national industrial policy have succeeded in a remarkable degree, and the competition is growing in area and severity.

Germany

German
Competition

31

The official German statistics published in the Appendix (Tables 8 and 9) show that the total German exports of all descriptions of pottery to all countries have risen from £2,983,000 in 1898 to £5,085,900 in 1905, an increase of about 71 per cent.

The distribution of the German export trade is roughly as follows:—United States, $\frac{1}{3}$ rd; United Kingdom, $\frac{1}{6}$ th; while the remaining half is distributed between France, Belgium, Holland, Austria and Switzerland. The export trade to the United Kingdom rose from £484,000 in 1898 to £647,000 in 1905, an increase of 34 per cent. The principal development is in porcelain tableware, coloured, gilded, &c. In 1898 the United Kingdom bought of this class of German ware £272,000 worth; in 1904 the amount was £425,000, or over 60 per cent. of the total German exports to the United Kingdom, and in 1905, £365,000, or over 56 per cent. This fancy porcelain, with other classes of porcelain ware, represent over 90 per cent. of the German pottery exports to the United Kingdom.

32

The chief item of the German export trade with British Colonies is porcelain tableware, coloured, gilded, &c., the value of which in the case of Canada, Australasia, India, and South Africa has risen from £88,000 in 1898 to £143,000 in 1905, or nearly 63 per cent. The greatest increase has taken place in the exports to Australasia, which were £23,000 in 1898 and £64,000 in 1905, an increase of 178 per cent. The exports to Canada increased from £33,000 in 1898 to £57,000 in 1903, and fell back to £46,000 in 1904, and £39,000 in 1905, under the operation of the Canadian surtax. Up to 1903 there was also a considerable rise in the exports of this class of German pottery to British South Africa, but a change in the German classification of the South African countries does not permit of a satisfactory comparative figure being given for 1904.

33 The relative progress of the British and German trade with the British Colonies of Canada, Australia, New Zealand, and South Africa, is shown by the fact that the exports from Germany were in 1895-99, £81,000, and in 1905, £173,000, an increase of £92,000, or 115 per cent. On the other hand the exports from the United Kingdom to the same Colonial markets rose in the same period from £468,000 to £580,000, or by 24 per cent.

The largest single market for German pottery ware is the United States. The increase in the case of porcelain ware of all kinds alone has been from £594,000 in 1898 to £1,587,000 in 1905, an increase of 167 per cent. The exports of other classes of German pottery than porcelain to the United States are small.

34 The success of German competitors in South American markets, such as Argentina, Brazil and Chile, is shown by the fact that, according to the German returns, the exports of coloured, painted and gilded pottery have increased from £46,000 in 1898 to £113,000 in 1905, or 144 per cent.

The relative progress of the British and German trade with South American markets, namely, Argentina, Brazil and Chile, is shown by the fact that the German exports rose from £118,000 in 1895-99 to £226,000 in 1905, an increase of £108,000, or 91 per cent. On the other hand British exports to the same countries rose from £147,000 to £274,000, an increase of £128,000, or 87 per cent.

German Dumping

35 In some of the instances quoted in the evidence German pottery goods are sold in British and Colonial markets at less than the British manufacturer pays for labour alone upon similar articles. As witnesses explain, the German manufacturers, having the double market at home and abroad, keep their factories going at full capacity, the only extra cost to them for the exported goods with which they undercut the British manufacturers being the raw material and the bare wages paid to the potter. Thus the exported goods are often sold at any price they will fetch. In illustration, the following instance may be quoted from the evidence: "A short time ago Doulton & Co. were selling a registered design for 16s. per dozen. The Germans made copies and sold them in five or six towns in England and Scotland at prices from 3s. 6d. to 12s. 6d. a dozen for precisely the same article. That shows that the agent has been told to sell at any price he could get." Again: "German china egg-cups, with four gold lines, are sold in London at 4s. 3d. per gross, delivered and no charge for package. We make egg-cups in earthenware by machinery, with girls to attend to the machines; they are never touched by men's labour. We put two gilt lines instead of four, and this work is done by women. Our cost of these, including actual dead expenses, but no profit, is 5s. 3d. per gross on the works, *i.e.*, no charge for carriage is included." Again: "Sets of three jugs are sold in Germany for 1s. 7d.; the same jugs are sold here for 9d. Heavy gilt cream jugs from Germany are sold here for 2d. each and we cannot produce them under 7d. each." In their export trade German manufacturers seem to have been especially successful in crippling the British trade in what manufacturers call "side lines," such as egg-cups, butters, cover dishes, sardine dishes, &c. German exporters are said to have driven British manufacturers very largely out of these lines into the staple lines, such as dinner and toilet ware, thereby greatly increasing the British home competition. Detailed references have already been made to the manner in which German manufacturers have succeeded in the British Colonies and in foreign markets which were formerly in the hands of British manufacturers. (*See also State of the Several Branches.*)

German Piracy of British Designs

36 The greatest complaint is made of the way in which the German manufacturers pirate British designs. One witness had 40 models, which cost him between £400 and £500. "A foreign firm bought samples, copied 38 of them, and travelled with my samples before they had time to get their own out." The same witness also remarks: "The Germans wait until they find out which is a success, and then copy it and injure the trade by putting very inferior copies on the market. The competition is not direct, but as soon as there is a cheap copy the good shops will not buy the originals."

German wages are represented as being at least one-third lower than in England ; also the German hours of labour are considerably more per week than in England, while " children are allowed to commence work much younger." One witness gives the wages in Germany as being from 25 per cent. to 40 per cent. lower than in the Staffordshire potteries, and " in special cases, such as the making of cream jugs, the writer knows of one factory where they are lower by at least 50 per cent." On the other hand, it is also remarked that " though the labour was cheaper it was not so good as ours, and in the long run it was no cheaper," and with reference to organisation the same manufacturer says that " there is greater division of labour in the works and the works are larger. Machinery can be put in on a larger scale."

German Wages
and Labour

37

Frequent reference is made by witnesses to the advantages which German manufacturers derive from the low rates of transport both by sea and rail. " It is well known throughout the trade that the Germans have an advantage in their freights." " The German railways and canals carry goods inwards and outwards at cost, or very little above it, and in the case of exports there is a rebate, which acts as a preference to German exporters of earthenware and china." Special attention is drawn to the preferential rates given to German goods, even when carried in British ships conveying British goods of a similar character to the same destination. " We are handicapped by the preferential rates given to foreign producers' goods. A short time ago they got goods from Germany to Australia in the same British steamer as ours at a very much lower rate of carriage."

Transport

38

FRANCE.

France stands next to Germany in respect of recent progress in the pottery industry. The French manufacturers have been especially successful in competing with the better classes of English earthenware, and the scope of their activities may be judged from the list of competing imports from France published in paragraphs 198-9. The exports of French pottery to all countries have risen from £1,006,000 in 1895 to £1,516,000 in 1905, or 50 per cent. Of this the exports to the United Kingdom represented £154,000 in 1895 and £240,000 in 1905, an increase of 56 per cent., the proportion to the whole French exports having thus risen from 15 to 16 per cent. Practically the whole of the trade is in white and decorated porcelain ; of white porcelain the French sales in the United Kingdom have increased from £105,000 to £160,000, or 52 per cent., and of decorated porcelain from £43,000 to £72,000, or 66 per cent. The former market in the United States for French white porcelain has been almost entirely lost, but the exports to the United States of decorated porcelain have increased from £69,000 to £193,000, or 180 per cent. in the 10 years. There is a substantial French trade with South America in what the French returns describe as " ceramic pavement," which has increased in the case of Uruguay and Argentina from £28,000 to £55,000, or 96 per cent. in the decade. The French exports to Belgium in fire-proof pottery of common clay has increased from less than £10,000 to £31,000, or more than 200 per cent.

France

39

As with other Continental competing countries, the longer hours and cheaper labour are most important items in assisting the French manufacturers in their competition, in addition to which there is plenty of china clay in France of very good quality. France can now dispense with the English tea ware which she used to import 10 or more years ago. British trade with France in sewerage pipes has also been supplanted, French manufacturers now making the goods according to English methods. Under cover of a tariff a large market has been gained in English hotels and England generally for French china for domestic uses and fancy china of all kinds. It was formerly a general custom to employ French artists in our leading potteries, but this is not so much the case now, and a manufacturer who has had " some experience at Sevres " states that there is no comparison between the good English potter and a foreign potter. We import flints from France, this being

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the only raw material we have from abroad, vessels from Cardiff to Dieppe with coal bringing the flints back. It is desirable to obtain flints as free from impurities as possible, and that on the north Coast of France was found to fulfil the potters' requirements. Materials for the manufacture of tiles such as china clay and flint are obtained from France by other Continental makers.

BELGIUM.

Belgium

Manufacturers state that considerable activity is now being displayed in Belgium in the production of fire bricks and bricks of other kinds, sanitary pipes and tiles, and sales in Great Britain at from 20 to 30 per cent. below British cost price are spoken of. The competition would not seem as yet to have developed to any serious extent, but Belgium is now to a large extent independent of British importations of these classes of pottery. Belgian goods are also said to be met with in the British Colonies and India, though the official Belgian figures indicate that the total value must be small. The Belgian figures show that two-thirds of the total exports of earthenware goods consist of terra-cotta bricks, drain pipes, &c., nearly the whole of which goes to Holland. A list of the Belgian pottery wares which are said in the evidence to compete with British products will be found in paragraph 199. The hours of labour are longer and the wages less than in England and women are very largely employed in the industries.

HOLLAND.

Holland

Dutch progress in the pottery industry is especially concerned with the making and export of tiles. "Holland being a low tariff country, British makers are still able to export, but they cannot send white tiles, only the enamel varieties." "A few years ago malt kiln tiles were exported in some quantities to Holland, but owing to the tariffs this trade has come to an end." Dutch competition is regarded seriously by English tile manufacturers, who state their inability to make headway against it. One witness says: "There is only one explanation, and that is they are selling below cost price, though not in one sense below cost, because their surplus production costs them nothing beyond the labour and the raw material." It is said that the Dutch tiles are sold in England at 25 per cent. under lowest English prices. One witness says: "The price for these tiles per square yard is in Amsterdam 6s. wholesale, and in London 5s. wholesale, after a longer carriage and shipping charges, &c., are paid. Taking all the advantages and disadvantages into consideration we are of opinion that 5s. is below the true cost price per square yard in London." It is explained that the British policy of free imports permits the Dutch tile maker to keep his works running continually and to dump his surplus into England. "They export an enormous quantity and are largely assisted by the low rates of water transport." An example is given by the following quotation of rates: china clay and flints, Rotterdam to Wesel, 3 marks per 1,000 kilos; earthenware, fine, Wesel to Rotterdam, 5.50 marks per 1,000 kilos. The distance is about 100 miles, and it costs the Staffordshire maker 15s. 6d. to convey his earthenware to Liverpool, 50 miles. "The Dutch potters work at about 3s. 4d. a day, as against English potters at 5s. and 6s. a day. They both actually work at piece work, but the above is stated to be about the average day's wage. It is asserted that the Dutch have captured the Ceylon and India trade for common painted earthenware for the natives and also the South American trade to some extent.

AUSTRIA.

Austria

The manufacture of pottery ware is carried on very largely in Austria, and extensive consignments of goods find their way to British and Colonial markets. The total Austrian export of all classes of pottery and earthenware to all countries amounted to £668,000 in 1895 and £1,248,000 in 1905,

an increase of 87 per cent. The exports to the United Kingdom were £23,500 in 1895 and £278,700 in 1905, an increase of nearly 1,100 per cent. In the same period the exports to the United States have declined from £190,000 to £163,000, or 14 per cent. Whereas formerly the United States was the more important export market for Austrian pottery its place has now been taken by the United Kingdom, which takes more than 20 per cent. of Austria's total exports of this class of goods. Five-sixths of the Austrian exports to the United Kingdom consist of porcelain, coloured, bordered, gilded, &c. In 1905 £230,000 worth of this class of pottery went to the United Kingdom as against £9,000 in 1895, an increase of nearly 2,500 per cent. The exports of coloured pottery to the United Kingdom have risen from £14,000 to £41,000 in the same period, an increase of nearly 200 per cent. The exports of Austrian porcelain ware to Australasia were nil in 1895 and only amounted in value to £350 in 1901, were in 1905, £22,000.

The great advantages possessed by the Austrian as regards cheap labour and facilities in transport are frequently referred to in the evidence. Although not so extensive as that from Germany, the Austrian competition is severely felt in a number of directions—not only in the cheaper varieties of goods but also in those of a higher class, and as in the case of German manufacturers complaint is made of the Austrian piracy of expensively protected English designs. A full list of pottery goods in which Austria is found to compete is published in paragraph 199. Competition from Austria is also experienced in Australasia in cheap china teas and staple china goods.

JAPAN.

The competition of Japan in the pottery industry is still pretty much of an unknown factor, but witnesses who have noted the character of the growing exports have no doubt that a similar revolution will take place in Japan's pottery as has taken place in her textiles. The Japanese official figures show that the total exports of "porcelain and earthenware" have risen from £210,000 in 1899 to £532,000 in 1905, an increase of 144 per cent. Japan's largest market is and has always been the United States, to which one-third of her exports went in 1899, and more than one-half in 1905. Japan's exports to the United Kingdom in the same period declined from £33,000 to £25,000. There have been increases to Australia (from £9,000 to £14,000) and Canada (from £4,000 to £18,000), and a decrease to India (from £15,000 to £10,000). The Japanese trade with Hong Kong, in the main probably an entrepot trade, is £29,000, as compared with £34,000 in 1899. "At the present time these things are made by village communities, and the product is stored and sold once a year to the men who go round to purchase it. Just in the same way that they went into factories with their textiles they will go into factories with their pottery, and as they are the greatest imitators in the world, there is not the slightest doubt that when their labour for the ordinary dinner and toilet ware comes into contact with the much higher-priced labour of this country, the depression that will ensue in the pottery trade will be tremendous." Another witness says: "I have a cup and saucer from Japan, sold at 2s. 6d. in Liverpool, and a gilder who saw it at an exhibition said he should want 7s. 6d. for gilding it. It is a most beautiful piece of work, and is china made of the same material as German china, viz., what is called 'hard paste.'" "For many years past," says another firm, "there have been imported from Japan into this country quantities of ware, mostly isolated pieces of quaint and decorative designs and shapes, now there is every evidence of the fact that the Japanese are beginning to organise the trade and they are now making and sending in some degree standard lines of goods." And in view of the exceedingly low rate of wages in Japan—said to be 4d. a day in some classes of pottery labour—and the innate artistic character of the Japanese people, their competition in the future is much feared.

United States

Before the McKinley tariff of 1890 the United States were largely dependent upon British supplies of pottery, and in 1895, during the reduced Wilson tariff, the sales of British pottery in the United States reached £955,000 per annum. Under the high Dingley duties this condition of things has been changed, and with the assistance of British potters attracted to the United States by high wages, United States manufacturers have ousted British trade from one branch after another.

**Development of
the United States
Industry**

The evidence shows that 20 years ago very large quantities of toilet ware used to be sent by the Staffordshire makers to the United States, but now comparatively little is sent, as this is a line to which the American makers have paid special attention, and they seem to be supplying the bulk of the requirements in America. Another manufacturer states that the very large trade in sanitary ware which he formerly had with the United States has been entirely destroyed, and it is said that transfers, painting and similar work is done well in the United States. Again, the McKinley tariff stopped the importation of a great many English goods of the common grades, and rendered white granite ware (the staple trade) unprofitable to English makers. "Our export trade to the United States has suffered. Years ago we used to ship some 200,000 fire bricks a year; now our trade there is practically nothing." "Until the Dingley tariff there were few tile manufacturers in the United States. Now there are many and large ones. Their trade has been built up distinctly in consequence of the protective policy. The tile manufacturers could not get on at all until the tariff was raised 25 per cent. *ad valorem*." With regard to the future of the industry in the States another witness says: "In 10 years' time America, with its tariff advantages and the use of new transfer machines and new kilns, and also the fact that they can get a good price in their own market, will be able to beat us hollow." There was formerly a wide difference between the duty on undecorated and decorated ware, and small quantities of high-class British ware were imported for decoration in the United States, but the differentiation of duty is now done away with. As a matter of fact, the American market is already regarded as almost completely closed, a manufacturer stating that "with the exception of the semi-porcelain branch it is utterly impossible to trade there. The Americans have not yet reached that stage, but have caught us up in the others."

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**United States
Competition in
Canada**

As with other branches of trade United States competition is severely felt in Canada. "We have tried quite hard to open up a trade with Canada, but so far everyone tells us there is no chance for our trade in that country; the last advices from Canada said: "I do not see any chance for you in this country, because the Americans dump the best sanitary ware here, and we make our own common ware.'" "The United States practically control sanitary earthenware in Canada now." The acquisition of fresh territories by the United States is, according to the evidence, immediately followed by the imposition of prohibitive tariffs as far as British manufactures are concerned. "Trade we used to do with the Hawaiian Islands regularly for the last 20 years," remarks one witness, "is now being done by the Americans; they have also got the Cuban trade, thus conclusively proving that when they get hold of a country we English manufacturers are at once shut out." "The Cuban market is now in the hands of the American, and the same remark applies to Honolulu and the Hawaiian Islands, with which we used to do a large trade. This is probably owing to tariff arrangements with America."

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**United States
Trade Follows the
Flag****Labour in the
United States**

Salaries and wages in the United States are considerably higher than they are in the United Kingdom. Witnesses who have assisted in the management of factories in America say that labour costs very much more considering the increased output; in one case the cost is said to be 25 per cent. more. "Practically there are no American workmen in the pottery; they have had almost all their workmen from England. They are training their own apprentices now, but they are trained under

English workmen, and are practically as good when so trained." As regards manufacturing processes, witnesses who have visited the country and been round the works state that the Americans possess no advantages.

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The export of raw material from the United Kingdom to the United States is explained by witnesses by the fact that they have clays in America for making china, but not earthenware ; consequently, for ball clay, which is absolutely essential for the manufacture of the latter, they are entirely dependent on supplies from this country. On the other hand, " America can furnish a large quantity of china clay, but a great deal of English material is used because potteries have been established with English managers, and when they have gone over there they wanted to work on the English lines, and it was much easier to start with a china clay they knew." (*See also paras. 28-9 and Table 2.*)

**United States
Dependence upon
English Clay**

Manufacturers complain of the rigidity of the Customs regulations in the United States, which they think compare most unfavourably with those of this country. " With regard to goods imported by us from the United States, every facility is given by our Custom House in connection with the importation of American goods. On the other hand, the United States Custom House puts every difficulty in the way of our manufacturers introducing their goods into the States. To say nothing of the prohibitive duties exacted, they have a rigid and exorbitant system of consular invoices, and even small consignments by parcel post are rigidly scrutinised as regards marking, &c. Such a system, in view of the different treatment we give to United States manufacturers, is grossly unfair and calls loudly for retaliation."

**United States
Customs
Regulations**

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(C) BRITISH COLONIES AND INDIA.

The pottery industry is still in its initial stages in the British Colonies, and British manufacturers find in Canada and New Zealand, and in a lesser degree South Africa and Australia, their most promising export markets.

**British Colonies
and India**

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Whereas the export trade to foreign countries has remained practically stagnant during the last quarter of a century, that to the Colonies and India has increased from about 25 per cent. of the whole British export to nearly 40 per cent. In the opinion of many of the witnesses the development of the Colonial trade is almost entirely dependent upon the tariff preference given to British goods. " The inclination in the Colonies is to take our goods, unless the difference between our prices and foreign competitors is too great ; but in many cases we are cut out for the same reasons as those given for excessive imports into our own country, viz., cheaper freight and no tariff, combined with cheaper materials and lower wages."

The competition of Germany and Belgium is most severely felt in some of the Colonies, as has been already indicated under the several branches of the trade. Especially is this so in the case of Australia, where there is no British preference in operation, and in South Africa, where the preference is too small to be of much service. " In Australia," says one witness, " we formerly had the sole control of the trade, but the Germans have made very great inroads into it. I arranged with an Australian firm to represent me in Australia last year, and naturally made an effort to insert a clause in the agreement excluding the sale of German china ; they said, ' If you insist on that we shall have to drop the matter altogether, as we sell more German china than English.' " Again, " We have reports from our agents both in Australia and South Africa that the German and Belgian manufacturers are pushing the trade very hard, and delivering the goods free at prices very much under what we can supply." " Foreign competition in the Colonies is very severe, especially in South Africa and Australia." A manufacturer of general china remarks : " Our experience in the Colonies is that the Continental manufacturer is getting orders which should in our opinion be placed

**Foreign Competition
in the Colonies**

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in the Potteries." "With regard to trade in the Colonies," remarks a manufacturer of teapots, jugs, &c., "had we not the cheap German enamel and china goods to compete against, our export trade would be more exclusive and show a larger remuneration." In the case of trade with South Africa and Australia substantial advantages accrue to foreign manufacturers from cheaper transport from Hamburg and other ports.

Canadian Preference

The preferential duties in force in Canada, South Africa and New Zealand, and especially those of Canada are reported to have been of the greatest advantage to British manufacturers. The Canadian pottery industry being still in its infancy, competition in the Canadian market lies chiefly between British and United States and (until the surtax) German manufacturers. It is the almost universal verdict that the preference has greatly encouraged trade and led many manufacturers who had not previously attempted Canadian trade to appoint agents and make trial shipments. The following are a few typical experiences of manufacturers: "The preference has been a very great thing for us, and we are now contemplating going into the Canadian market. If the preference were withdrawn the Canadian market would be practically closed to us." "We have a good trade with Canada, as there is no china made there of any class." An earthenware manufacturer, in referring to the trade in tiles, states that the preference has resulted in a larger number of inquiries and increasing trade. A maker of floor tiles says: "In Canada we have begun to do more business since the preferential rates have been in force." "The Canadian preferential tariff has already nearly doubled our trade with that Colony."

Inadequacy of Preference

In some cases the preference would seem to be inadequate to meet the advantages arising from the proximity of the United States to the Canadian market, or in some cases to offset the dumping methods of United States makers.* The following quotations are illustrative on this point: "United States has taken the bulk of the trade in fire bricks. We should be in a position to compete for the business in British Columbia were the preference substantial." "United States practically control sanitary earthenware in Canada now. Our trade has increased considerably with Canada since the introduction of preferential tariff, although German competition is still very keen." Another sanitary ware manufacturer states his complete inability to establish a connection in Canada owing to the American competition. A communication from a Canadian correspondent, he remarks, was to the following effect: "I do not see any chance for you in this country, because the Americans dump the best sanitary ware here, and we make our own common ware." In connection with the development of Canadian industries a manufacturer of common earthenware remarks: "Some years ago we used to send common brown Rockingham teapots to Canada. We were informed by the merchants that Canada has begun to manufacture such things." German competition in Canada is little spoken of, probably because of the operation of the surtax.

Australia

In Australia German competition is keenly felt, especially by reason of cheaper German freights. It is said that "the Germans are gradually securing the tea-set trade with Australia, and they are attacking the trade in general china." Again, "The Germans are ousting us by means of their surplus production both in South Africa and Australia in china tea and breakfast ware. A quantity of these goods is first brought to this country and then re-exported as British goods." United States competition in Australia is spoken of as a new feature. "Flooring tiles are now being shipped to Australia

* There is an Anti-Dumping Clause in the Canadian Tariff which provides that "In the case of articles exported to Canada of a class or kind made in Canada, if the export or actual selling price to an importer in Canada be less than the fair market value of the same article when sold for home consumption in the usual and ordinary course in the country whence exported to Canada at the time of its exportation to Canada, there shall, in addition to the duties otherwise established, be levied, collected, and paid on such article, on its importation into Canada, a special duty (or dumping duty) equal to the difference between the said selling price of the article for export and the said fair market value thereof for home consumption." This special duty is not to exceed fifteen per cent. *ad valorem* in any case and certain exceptions are made as for instance goods whereon the duties otherwise established are equal to 50 per cent. *ad valorem* and also sugar refined in the United Kingdom.

from America below ordinary cost price." A manufacturer of dinner ware remarks: "We have had some competition of foreign earthenware in Australia, but have been able to hold our own because of the quality. The price might have been ruled a little higher had it not been for this competition." With reference to the Australian import duties, several of the witnesses suggest substantial reductions and there is a general desire for a preferential arrangement.

The preference allowed by New Zealand in British goods is spoken of in appreciative terms by several of the witnesses. "We have never done much export trade until recent years, but there is no doubt whatever that the preferential tariff with New Zealand will help us very much. We have had letters from our agents there, pointing out that there is a good prospect. The preference is almost 25 per cent." **New Zealand**

The South African markets have been in an unsettled state for some time past owing to the effects of the war, and British trade has suffered. There is also said to be a prejudice on the part of the Dutch against British goods, which it will take time to allay, and this prejudice is not discouraged by German merchant houses in South African centres. The small preference is, however, showing results, as for instance: "There are signs that we shall get some of our trade again, and I have just made arrangements for opening an agency at the Cape, from which I am expecting better things." "The preference of 2½ per cent. on English to Cape Colony is affecting earthenware, and if it were increased a little more there is no doubt that it would help us. The preference in Natal is 25 per cent. of the duty, which is 10 per cent. on earthenware." The cost of transport is referred to by witnesses as being detrimental to expansion of trade with the Colony. **South Africa**

In India competition with foreign countries is severely felt in a number of directions. "The Dutch have captured the Ceylon and India trade for common painted earthenware for the natives." "In India we have been completely knocked out by German and Dutch makers of domestic earthenware within the last few years." Manufacturers of tiles state that the competition in their direction is of an active character. "French roofing tiles are chiefly used in parts of India." United States and Germany are also referred to in the same regard. **India**

In connection with trade in the West Indies it will be seen from the following quotation that the market is inconsiderable: "We went to that market, but prices are cut so low that it is not worth while going in. They get their goods from Germany and some come from England, but it is a very low class of goods on which the margin of profit is cut very fine." **West Indies**

(D) STATE OF THE SEVERAL BRANCHES.

A steady decline is reported in the branch of the trade which is especially concerned in the manufacture of china. This branch is said to have been much harder hit by importations than any other. Some manufacturers say they have all the plant to make 80 per cent. more goods than they now make; others speak of their normal output as 50 per cent. more than their present make. **Breakfast and Tea Ware**

It is agreed that the importation, especially from Germany and Austria, of the commoner classes of goods is the chief cause of the decline of British trade in breakfast and tea ware. As already indicated, the evidence gives many illustrations of the undercutting of these importations. Thus German tea services are said to be sold here at 6s. 6d. per set, which British makers cannot produce for less than 10s. 6d., and in the commoner lines of china the Germans are said to undersell us by about 25 per cent.

Manufacturers who formerly sent large quantities of tea sets to foreign countries report that the trade ceased 10 years ago. There is now practically no export trade to foreign countries in common china. There is a good and increasing trade with Canada, but there and in other Colonies competition is experienced from Germany and Austria, as already indicated (see paras. 55-63), &c.). In South American markets German manufacturers would seem from the evidence to have made great strides at the expense of British trade. "Trade in common earthenware plates, bowls, teas, jugs and chambers, white, sprayed and painted, has decreased very much indeed with Mexico and South America, specially Brazil, and is now being done principally by German manufacturers."

Dinner Ware

Witnesses compute that half the dinner ware sold in London is now of French, German or other foreign make. In other parts of the country the proportion is said to be similar in the leading stores and shops, while in the smaller shops there is probably a larger share of foreign goods. "Dinner services of French china have been sold freely by most of the retail houses for some years past, and have displaced similar services made in ironstone china, which we formerly used to make in large quantities." Again: "China dinner ware, &c., is imported from Germany and France below our cost price." Similar foreign competition is reported from the Colonies. Foreign tariffs have prevented British trade in this branch of manufacture in most of the European countries, as well as in the United States, where "the McKinley duty excludes all our manufactures of earthenware dinner services, &c."

Plates

Plates of all kinds are imported, many of them below British cost price, from Germany and Austria. Witnesses complain of similar competition in South Africa and Australia in "cheap plates of all sizes." Some earthenware dinner plates of excellent quality are imported "at 4s. 3d. per dozen, but we could not buy them here under 7s." Reference is also made to importations of dinner ware from Japan, manufacturers expecting severe competition from that quarter when the product of cheaper labour comes into contact with the higher British cost of production.

Teapots

In this class of goods there is evidence of foreign competition of the most aggravated kind in British makes. A Bristol manufacturer gives his personal experience in competitive quotations for white china fluted teapots. Cutting the price very fine he quoted 9s. a dozen, only to find the German price 2s. 9d. per dozen. "Now we pay our men for making alone 2s. 9d. per dozen, and they cannot earn very good wages even at that price; in fact, we have a difficulty in getting them made for it. This figure seemed to me so absolutely preposterous that I wrote to our agents and said that I thought this could not be an article in regular sale, and that they must have bought a job lot which, for some special reason, had to be got rid of. Their reply was that this was no job line, but a regular selling line, of which they had bought yearly many scores of dozens. Now I feel as confident as I can be about anything that this particular teapot could never have been produced under any conditions for the price at which it was sold. I ought to say also that this was a china teapot, whilst the price we quoted was for an earthenware one. The Germans were thus actually selling delivered free in London at the same price as we were paying our men to make them. There is all the labour of firing and preparing of the clay and glazes in addition to be added, and, of course, also the cost of the materials. The only conclusion one can draw is that these goods are dumped."

Dumping

A Stoke-upon-Trent manufacturer gives instances of German dumping from his own experience. He says: "There is a German china teapot sold, package and carriage free in London, for 3d. A very inferior teapot of my own earthenware, made by me, costs 2½d. in wages to my hollowware presser for making. The German teapot cannot be made for the price at which it is sold. The porcelain of which it is made is a 50 per cent. more expensive article than the earthenware of which mine is made. The cost of firing would be the same in each case, in fact the German would be a little more. That is a typical case of dumping. . . . A very large quantity indeed of these teapots is imported

into this country. That 3d. article is not an instance of surplus production, it is partly a matter of having their own market secure so that they can keep on full time, by which they can very seriously diminish their cost of production, and partly from convenience in firing." Another illustration is given as follows: "A customer of ours sells retail for 4½d. a German china teapot which we have to pay our workmen 3d. to make, then added to this there is the cost of modelling, moulds, clay, firing, turning and glazing, and loss by breakage at various stages of production. To make a reasonable profit on this article we should want to sell at 1s. 6d. to 1s. 9d."

Another example of dumping is a small cream-jug, sold at 9d. a dozen. The British manufacturer pays 10d. a dozen for making a larger earthenware cream-jug, and he explains the method of foreign manufacturers: "They first of all establish an agency in London and get these particular lines well established in the market; then they cease their agency in London, and send out a circular to their customers, stating that they will now deal direct, and that they will be able to supply the goods still cheaper; and they no longer pay one single farthing towards either rates or taxes."

Cream Jugs

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For some years past china bedroom toilet services have been imported to some extent, but foreign makers do not compete to any appreciable extent at present, though an increased importation is anticipated. Foreign china toilet services are sold at about the same as British earthenware sets. Imported earthenware sets have also made their appearance, and are being sold below British makers' cost prices. Twenty years ago large quantities of toilet ware were sent to the United States by Staffordshire makers, but now comparatively little goes, the United States largely supplying its own wants.

Toilet Ware

A few witnesses state that in some sections of fancy goods we have held our own against foreign competition and have even been able to export to the United States and the Colonies. "Foreign competition touches such articles as trinket sets, &c., but it can scarcely be called serious." Again: "Fancy articles for table use, such as cheese, butter, sardine dishes, &c., used to be sent from Germany in large quantities, but latterly we have been able to practically drive the foreigners out of our home market and also the Colonies." But on the whole witnesses agree that foreign competition in fancy goods is very keen, perhaps keener, than in other branches of the industry. There is the same "piracy" of the best English models as in other branches of the trade, and it is even asserted that by these methods and by sales at about one-third of the prices of the goods copied "the foreigner has captured fully 75 per cent. of the fancy goods trade of this country," his prices for most of the goods being "a long way below the prices at which English makers can sell." A specific illustration of the foreign manufacturers' piratic methods is given by one English firm as follows: "We originated small green hand-carved Sussex pottery pigs a few years back and found a good demand for them; patterns were sent by a London agent to Vienna, moulds were cast from these, and they are now sending back many thousands roughly-made bad imitations, which are being sold as 'Sussex pigs' at 2½d. each; ours retail at 1s. each, the very lowest they can be sold at, being entirely hand-made and not moulded as the foreign imitations are."

Fancy Goods

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Some years ago there was some trade with the potters in the United States in decorated ware, there being a demand for a higher class of goods than they could produce themselves, and a small quantity of really high-class ware was sent from this country for decoration over there. The imposition of United States' duties causes this export trade in undecorated ware to drop gradually. German tea sets are said to be very largely brought here by commission agents, who decorate and sell them again, frequently as English goods. German decorated china is said to be sold in the United Kingdom at about what British manufacturers have to pay for plain making only. Austrian decorated ware is also sold at similar prices, "so when decorated they must be sent here under cost of production." The question of competition from Japan is several times referred to, it being anticipated that imports from that country will very greatly increase in the near future.

Decorated Ware

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Foreign competition is said to interfere less with this branch than any other section of pottery. For one thing, it is a comparatively new industry, and the prices at which goods are sold by British manufacturers are said to be extremely low. Strong attempts are, however, now being made by foreign manufacturers to capture the market. The evidence indicates attempts by Belgium and Germany and the United States to obtain a footing in British markets with this class of goods, in some cases resorting to dumping for that purpose.

English makers are, however, meeting with increased competition from foreign makers in Continental and South American markets. In Switzerland, hitherto, British makers have enjoyed a practical monopoly of the sanitary ware trade, while Germany has the general earthenware business, but Germany competes with us in sanitary ware in a number of foreign countries, and especial mention is made of the harmful effect of the German subsidies to steamship lines which carry German produce to such foreign markets as the Argentine and Brazil. The export trade of sanitary goods to Germany is said to have "stopped entirely owing to the hostile tariff of 10s. per ton." British makers used to do a considerable trade with French ports, Havre, Boulogne, &c., but owing to import duties the trade was lost some years ago. The trade in sanitary goods with Norway, Denmark and the Baltic has fallen off owing to increasing competition from Sweden. The United States used to be the largest foreign market for this class of goods, but the hostile tariffs have had a most damaging effect. The United States is also said to practically control the sanitary earthenware trade in Canada; German competition has been keenly felt in Canada, but British trade has considerably benefited by the preference and surtax. The trade with South Africa in sewerage pipes, &c., has been cut into in some instances by the importations from Belgium."

The home trade in common bricks and some classes of tiles being a local trade is more or less in the hands of British makers. In other classes of bricks, tiles, floorings, and fire-proof ware of all kinds there is evidence of keen foreign competition. Some classes of fire-proof ware are said to have been displaced by foreign ware. There are heavy importations of foreign prepared floorings—a trade that has increased enormously of late years. Foreign manufacturers of fire-clay goods are also very keen to capture contracts, and a case is quoted in which a British contract was secured by a foreign maker, who not only supplied the fire bricks, but sent foreign workmen to lay the bricks. A British colliery firm is named as giving its contract for building coke ovens to a foreign firm who brought 1,200 tons of foreign bricks into the very home of the English fire brick trade. A considerable amount of trade with ironmongers in coloured enamels has been lost because of the importation of Dutch tiles. Foreign competition is most severely felt at seaports and towns on or near rivers and canals, such as Newcastle, South Coast, Hull, Folkestone, Dover, Liverpool and London, foreign goods being aided in replacing British by their cheapness and the lower transport rates from Holland, &c. In some cases the success of the foreigner in placing orders here for fire bricks and retorts is attributed to the fact that foreign makers, feeling more secure in their trade, take special means to adapt their goods to requirements. Silica bricks, fire bricks, and magnesite bricks are said to be imported from France, Germany, Belgium and Greece below the normal cost of production in those countries, and there is much evidence of importation below the British cost price.

Special reasons operate against exports of heavy classes of pottery, and the majority of British brick and tile makers do not attempt an export trade. France now makes its own tiles, &c., French clay-workers having to a large extent adopted English methods of manufacture. "The cheaper class of tiles, &c., which 10 years ago used to be shipped to the United States and Germany in large quantities is practically dead, simply because they are making all they want themselves." In most cases the manufacture of these goods in their own country has been greatly encouraged by the imposition of duties more or less prohibitive of imports. Germany has made inroads upon British business with Portugal, Denmark, Sweden and Norway, with wall tiles and floor tiles. The United States competes with us in Canada, Australia and New Zealand in plain and enamelled wall tiles and floor

tiles and fire bricks. Belgium and Holland, besides competing in the United Kingdom, cut into British trade with the United States, Argentine Republic, Portugal, Canada, Australia and New Zealand in wall tiles and coloured enamel tiles. Sweden is our chief competitor in Russia in fire bricks. French roofing tiles are chiefly used in parts of India and Australia—they also compete with British makes in South Africa.

The demand for this class of pottery has increased enormously in recent years, and most of the increased trade appears from the evidence to have gone to German and other foreign manufacturers. Porcelain electrical fittings, castor bowls, and door furniture are imported from Germany below British cost price. Some years ago the Germans brought to these markets commodities of this kind which are said to have quite destroyed the trade of some British firms. Foreign competition is indeed very keen in all but the cheapest heavy articles made from local clay. The considerable business formerly done in insulating and battery cells is now very largely in the hands of foreign houses.

**Door Furniture
and Electrical
Fittings**

(E) EMPLOYMENT AND WAGES.

The reports from the various pottery districts which refer to employment are mostly to the effect that work has been irregular for some years past and the number of hands employed has decreased. The workers are said by some witnesses to have suffered to the extent of 25 per cent. in their wages through having to work short time, business being intermittent in consequence of foreign competition. As a whole it is said there are considerably fewer workpeople employed in some of the districts now than 20 years ago. Some have drifted into other businesses ; a good number have gone to America ; many have become chargeable to the rates. The greater use of machinery is of course one cause of the decreased number of hands, but it is generally agreed that the factories could turn out much more work and employ many more hands were it not for unfair foreign competition and dumping. The normal output of some of the factories is said to be nearly 50 per cent. more than is now turned out. The McKinley tariff and the closing of the United States market to many classes of British pottery is especially pointed out as a cause of decreased employment, and the effect of the advent of Japan as a serious competitor in the world's pottery market is much dreaded. It is asked : "How can English potters stand up against a Jap's wage of 4d. per day ?"

Employment

The extent to which employment in the pottery and allied industries has been affected by the unrestricted importation of foreign china, will be gathered from the statement made by a manufacturer who gives specific figures as to the loss occasioned in the Longton and Fenton districts. He says : "The imports of foreign china amount to over half a million pounds worth per annum. Owing to this being bought from abroad instead of being made in this country, working potters lose in wages £250,000 per annum, or £5,000 per week ; potters' millers lose the grinding of 5,500 tons of bone, 3,500 tons stone, 750 tons flint, and 3,000 charges of glaze ; fire brick makers lose the sale of 1,000,000 bricks, irrespective of kiln, quarries and sundries ; marl owners lose the sale of 20,000 tons of marl, &c." The losses to coal owners and miners, bricklayers, blacksmiths, carpenters, crate and cask makers are also enumerated, and the witness further states that "70 per cent. of the total loss falls directly upon the workmen, who lose in wages £7,000 a week. Is it any wonder that the two towns feel the pinch of poverty under such a system ?"

**Effect of Imports
upon Employment**

If trade could be revived there would, it is stated, be no question of insufficiency of labour, a manufacturer remarking : "Assuming we got to-morrow double the amount of orders in the district we now have, we should be able to find hands to do the work. It would mean a re-arrangement, putting men up from inferior into better positions, bringing other workpeople in below and gradually working the staff up ; it could be done very quickly."

**Possibility of
Improved Conditions**

As regards the possibilities of the trade under more favourable conditions one witness remarks : " We could increase our output to-day 40 per cent. if we wished it ; that would be general in the trade ; some firms could double theirs, as they have the plant and could get the workpeople. We could employ 80 per cent. more men ; our establishment people would remain the same, but of the producers we could employ just double. 20 per cent. of our workmen are the same whether we are working full or half time."

Efficiency of Labour

As regards the quality of the labour at their disposal, manufacturers are apparently agreed as to the superiority of the British workman. " Taking all things into consideration, the British potter is the best in the world." " Staffordshire pottery is beyond doubt the best in the world and the skilled labour has been there for generations." " We have now good hands in our works in the higher branches, all taught in the works from lads."

Deterioration of Labour

On the other hand, witnesses state that the depression in trade has had its effect and that the quality of labour is deteriorating. " He (the English potter) is getting into a careless, slipshod method of working owing to the depression in the trade which somehow reaches the man." " The depressed condition of the pottery trade brings about a feeling that there is practically no reward ; this depression and despondency is remarkable in the towns of Longton and Fenton." It is also said that the same interest is not shown in the work as formerly. " I remember the time," remarks a manufacturer, " when an oven was drawn, the potter looked at his work and was pleased if it came out well ; there is less of that kind of thing now." " A fully-staffed works can be managed much better than a half-staffed one ; where some of the benches are empty, there is always carelessness amongst the work-people."

Apprentices

It is generally recognised by manufacturers that the best workmen are those who have worked their way up and, consequently, the system of apprenticeship continues to be largely in favour, but " the unsteady nature of the employment has ceased to attract lads, and the consequence is that the trade suffers. We indenture our apprentices, but it is becoming more and more difficult to get good men." " We want more apprentices who would learn the trade thoroughly and then technical education will be of immense benefit, as it will enable them to use their experience better."

Wages

Manufacturers state that there has been no material change in the rate of wages and no decrease in the amount earned by a man working full time, but there has been so much short time that the total earnings of the workers are reduced from 25 to 40 per cent. The wages are said to be about 30 per cent. higher than those of Germany, but the comparison loses force when British employment is broken. The general impression is that the earnings of the British workpeople in the industry are less than they were a few years ago despite the great increase in the use of pottery generally.

(F) COMPARATIVE ADVANTAGES.

Raw Material

It is pointed out that foreigners have no advantage over British manufacturers as regards raw material or sources of supply, but obtain it quite as cheaply. Clays come from Devonshire, Cornwall and Dorsetshire, and although our foreign competitors have other sources of supply, with the exception of Austria, they obtain large quantities from England. (*See also* Paragraphs 28 and 29.) One witness gives an interesting account of bone as a raw material and the methods of manipulation.

Manufacturing Processes

According to the evidence of numerous witnesses we are quite up to the level of foreign countries as regards manufacturing processes. " In some of the older potteries in England the plant is not quite up-to-date, but many of our trades are of a special character in which no machinery can be applied, consequently no alteration in plant would improve the condition." Another maker remarks :

"Mills and factories are practically the same and foreign countries have no advantages in better machinery nor are their works on a larger scale ; in so far as earthenware is concerned there are much larger factories in England, or quite as large as anywhere abroad." All the best factories on the Continent are said to have been fitted up by a British firm.

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It is, however, recognised that the Germans have an advantage from better organisation. Having a protected market and security they are able to erect large factories, with everything as up-to-date as possibly can be got and an absolute security for their trade. That the Continental manufacturers have some very distinct advantages is generally agreed, these consisting, apart from protected home markets, of cheaper labour, longer hours, fewer Government restrictions and lower transport rates. As far as the labour is concerned, it is thought by some that inasmuch as it is not equal to ours in quality, the cheapness is materially discounted thereby. Continental manufacturers are not hampered by stringent rules as to lead glazing as we are. The British manufacturer has to incur very heavy expense in insurance against and means to protect his workpeople from the dangers of lead poisoning, also in carrying out the Factory and Employers' Liability Acts.

Foreign
Advantages

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The difference existing between British and foreign ware is described at some length by manufacturers and the variations in manufacturing methods and materials are also given. "The ordinary German china is made from clay and felspar, this constituting the difference between hard paste and porcelain and bone china." In order to make here the hard paste china, it would be necessary to train up a different class of men, and it is also pointed out that foreign countries have natural advantages as far as fire-clay is concerned, and that we have no particular source of supply for felspar here. The hard paste china is not in itself any cheaper to make than ours, and it would be no advantage to try and make it in England.

The unsatisfactory rates of transport in this country are commented upon by a large number of witnesses, and it is thought the deterioration of the trade would be checked by improvements in this respect. This subject has already been dealt with in an earlier part of this summary. The important items of carriage, packings, and breakage are dealt with by the witnesses, the foreigner apparently offering distinct advantages to the foreigner. Another important feature is the matter of tare in the weight of goods chargeable with duty. Continental countries are in a position to send their goods direct by rail, and can thus pack in light packages, and in many cases can pack loose in the truck, thus escaping with a light tare and paying only on the net weight of the goods. The difference under these conditions is said to constitute an important differential duty against the trade of Great Britain in favour of Continental rivals.

Transport

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The technical instruction given in Germany is said to be much more complete and to the point than that given in this country. There is always an affinity between the education given and the branch of manufacture carried on in the district. "From what I have observed in Germany the system of technical education there produces better foremen and 'upper-grade' workmen; the 'common' workman does not avail himself of technical education." The importance of having a practical chemist in a factory is fully recognised by manufacturers, and reference is made to the special training required. "The German chemist is a clever man, but we cannot afford the money for him. If there were a trade ahead we should take him." As regards designers, we are said to be as far advanced as on the Continent. "Our schools of designs have been in existence in the Potteries for a great many years, and they turn out very good students. In fact, the highest productions of Minton's, Copeland's, Worcester and others have a decided pre-eminence over those of any nation in the world."

Technical
Education

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It appears to be the general opinion of manufacturers that cost of production is almost entirely dependent on the volume of output. Although a falling-off in trade and in output results in a reduction of hands, and consequently in the wages bill, and the price of material remains unaffected, the standing

Cost of Production

charges, consisting of rent, rates and permanent salaries, continue in full force. It is therefore obvious, as various witnesses point out, that the percentage of the permanent items of expenditure with a small output on the net cost of production is a very serious one. "If we could keep the factory fully employed it would mean a large reduction in our standing charges, and that would also mean that it would not be necessary to increase the price of our goods; on the contrary, cost of production would be less, and we should be able to sell cheaper." Goods cost more to produce in this country owing to rates, taxes, and impediments placed in the way of manufacturers by Government, and the greater continuity of employment is a great aid to foreign manufacturers in their competition with British makers.

Output and Cost of Production

As regards proportion of cost, two or three witnesses remark that it is almost equally divided into three parts: 33 per cent. establishment charges, 33 per cent. labour, and 33 per cent. materials. Another states that his figures show establishment charges from 25 per cent. to 45 per cent. and labour from 47 per cent. to 70 per cent., "leaving out quite a trifling sum for materials." Says one witness: "Half our machinery is idle, and we are working with half a producing staff. Were our factory fully employed our establishment expenses could not be increased by more than 10 per cent. and our production would be doubled. This would enable us to reduce selling prices by 10 per cent., and still leave us with increased profits." Again: "If the factories could get more work to do, most of them could turn out 50 per cent. more goods, practically without increase of establishment charges." "It is not cheap labour and cheap materials only that are the greatest factors of cheap production; but it is the quantity of production, coupled with the efficient use of labour-saving machinery, and without an assured market you cannot spend a large sum of money in doing that."

Profits

For the various causes indicated under the separate headings in this summary, manufacturers generally state that the net profits in the pottery industry have decreased in recent years. The severe foreign competition in the home markets has resulted in a systematic fall in prices, and the loss of foreign markets by reason of prohibitive duties has compelled many manufacturers to turn their attention solely to the home trade. This has inevitably led to very keen competition amongst the British makers, and when taken in conjunction with that from abroad the effect upon profits has been severe. A manufacturer of common chinaware says: "Our branch has suffered more heavily than the better-class china. The failures and poverty in the district (Fenton) attest the fact that profits have practically disappeared." According to an earthenware manufacturer, "the total net profits in our trade have decreased during recent years. This applies to all branches, more particularly to the sanitary ware." With regard to the quantities of china and earthenware from abroad, which compete so seriously with the production of British makers, it is pointed out that the "middleman is getting a very much bigger profit out of this ware than he is out of English makes."

Effect of Foreign Tariffs

The effect of foreign tariffs in restricting British export trade is shown in a number of instances. The export business of some firms with the United States has been almost entirely extinguished by the tariff, except for fancy articles. United States, tariffs have been especially effective in stopping the export of English goods of the commoner grades, and the United States, tariff arrangements with Cuba and the Hawaiian Islands, since the Spanish-American War, have also acted most prejudicially upon the British export trade. Foreign duties on china of various kinds vary from 20 per cent. in some Continental countries, to 60 per cent. in the United States and 130 per cent. in Russia. Contrasting the foreign tariff systems with the British policy of free imports one witness says: "The British policy of free imports enables foreigners to dump certain things; and it does more harm than that, for if a leading line can be dumped in a country like this, it gives the manufacturer and the traveller a chance of selling other things on which there is a good profit, and that is where we suffer. They have something to open the account with. The foreigner has a home market that is secured

Dumping

to him, and is able to dump surplus stock on us. For instance, if the dumping ground existed I could dump 50 per cent. of stock at 30 per cent. under the sale price in England. I could afford to take 30 per cent. less, and make 10 per cent. profit on it. If my establishment charges were 40 per cent. and I could make 50 per cent. more I could sell that at 30 per cent. less, and have a profit."

One of the greatest disadvantages brought out in the evidence is the weakness of the United Kingdom in any commercial negotiations affecting the industry. This point is especially dealt with in the evidence of Mr. T. C. Moore, Chairman of the Parliamentary and Tariff Committee of the North Staffordshire Chamber of Commerce, who has been concerned in the negotiation of many commercial treaties. The Cobden Treaty of 1860 was the first of a long series of international arrangements in which the methods of the classification adopted as between the United Kingdom and France became the model for other countries. The classification of goods was then naturally settled to suit the needs of British industry, and thus European tariffs became specially serviceable to British trade, which derived considerable advantage from the operation of the most-favoured-nation article in European commercial treaties. This system has been followed by the German system of commercial treaties designed for the development of German industry and the advantage of Central European States, and in the absence of any means of effective negotiation British industry is placed at a great disadvantage.

Mr. Moore quotes in illustration the position of the British pottery industry under the Swiss treaty. Germany, in her negotiations with Switzerland, secures good terms for general earthenware in which alone she is interested, and then "under the very plausible idea of not wishing to drive too hard a bargain (as the tariff in this particular case is not framed for protectionist purposes but for revenue), yield her consent to a large increase of duty of 50 per cent. which is asked for on the sanitary earthenware—as a concession to Switzerland—the result being that the operation of the 'most-favoured-nation' clause would mean an advantage to the trade of the contracting power, and a menace to the trade of the country, whose only claim to consideration in the treaty is that based on this particular clause contained therein. In dealing with treaties I have frequently found that where a contracting power can supply china and not earthenware, good terms are secured for china to the exclusion of earthenware; but in this particular case 'earthenware' is sub-divided so as to admit of the 'most-favoured-nation' clause being of no benefit whatever, but instead a means of injury to the trade of other than the contracting power to the treaty." Mr. Moore also shows how disadvantageously the British industry is affected in the arranging of treaties by allowances for tare and customs regulations generally.

(G) REMEDIAL MEASURES.

The witnesses are unanimous in their views as to the necessity of the imposition of import duties in this country, and a large number of manufacturers put forward suggestions. In some cases witnesses speak in a representative sense. Manufacturers are practically agreed that duties of from 10 per cent. to 25 per cent. would meet the case. "The bulk of the imports into this country are the low-priced articles in china, 10 per cent. on a low-priced article would not amount to much, and 25 per cent. would be a good deal better; but even on the low-priced articles a 10 per cent. duty would do an immense good." The attitude of the workpeople is practically unanimous in favour of the proposed change. "It does not matter paying 2s. a week more for what we have to buy if we can get two or three days' more work a week."

In view of the progress of trade with the Colonies that grant a preference to British manufactures, the greatest importance is attached to the negotiation of a system of mutual preference within the Empire.

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Treaty
NegotiationsClassifications and
Most-Favoured-
Nation Treatment

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The Swiss Treaty

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Remedial Measures

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97 **Effect upon Prices**

Manufacturers are decidedly of the opinion that the suggested duties would not cause a rise in the prices of goods, the encouragement to factories and the consequent competition acting as a safeguard in that respect. "With a 10 per cent. duty the internal competition would be sufficient to keep down any rise in price." On the contrary: "If we could produce double the quantity we should be able to take practically 10 per cent. off the charge to our customers. If I could produce 30 per cent. more than now from an average of 51 ovens to 90 ovens, I could sell at 11½ per cent. cheaper than at present, and be just as well off. In other words, the effect of the duty would be that we could reduce our prices." Great importance is attached by witnesses to the effect the duties would have in safeguarding the trade against the unfair competition of dumping. The British market is essential to the foreign producer. "Duties would not by any means stop foreign importations of crockery. But it would put it on a fairer level, and a small duty would be paid practically by the producer." "It may pay the foreigner better up to a certain point to pay the tax rather than stop part of his works."

98 **Classification**

It is pointed out that the classification of goods is of the utmost importance, "and in drawing up a scheme of classification, labour-cost should have a very fair consideration." "There should be a system of appraisement similar to that in America, based on the value of the goods as sold in the country of production."

Opinion of the Trade

Finally it is pointed out that the pottery trade as a whole takes a very decided stand on the question. "We have 60 firms in the china trade, and there are 50 of them absolutely agreed on the question of fiscal reform. Of the remaining 10, about half of the partners are very favourable, but from the fact that they each have a partner who generally, for political reasons, does not see fit to throw in his lot with us, they have to stand out."

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SECTION III.—EVIDENCE OF WITNESSES.

The following is a full summary of the evidence of witnesses. The only omissions are portions of evidence which the witnesses desired to be treated as confidential for trade or personal reasons.

WITNESS No. 274.

MR. T. C. MOORE

(Shelton, Stoke-on-Trent).

I was formerly a manufacturer of pottery ware, but 10 years ago I retired. I am Chairman of the Parliamentary and Tariffs Committee of the North Staffordshire Chamber of Commerce and consequently still retain my interest in the pottery trade and know exactly what they are doing, and am anxious to see it prosper. For the last 20 years I have been entrusted—so far as the pottery interests are concerned—with the negotiations in regard to all the commercial treaties made during that period. My experience has been, on every occasion, when a treaty has expired and has to be renewed, that higher duties are imposed and the difficulty of doing business thereby considerably increased.

Commercial
Treaties

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The object of protectionist policy on the part of foreign powers is to secure for native industry the supply of the home market, to establish and develop foreign trade, and to get rid of surplus stocks without delay by "dumping," or in other words, by selling off cheaply in foreign markets whenever the absence of a Customs duty allows this operation to be effected. To accomplish this object a duty sufficiently high is framed to meet the requirements. It is obvious that no amount of brains, no ingenuity, no cutting down of profits and lowering of prices will meet these conditions and enable this country to obtain a footing in their markets, when, in the absence of the power to retaliate, a tariff can be raised at will to shut us out. Dumping is also caused by trusts, kartels and bounties, though the free home market given by the tariff produces the same effect. We have unmistakeable evidence that the pottery trade suffers from dumping.

Dumping

It may be asked whether, in case negotiations are entered into with these countries, they will cease to take stringent measures to protect their industries, or whether they will easily throw open their markets in competition with other nations. I think not; but in such cases, where no arrangement can be arrived at, and there is evidence of the intention to shut us out of their market, we should treat them in like manner, and shut them out of ours. On each occasion when a treaty has been before this country for consideration, it has been my duty, either personally or by report, to inform our Government what influence these augmented tariffs would have on the pottery trade, and I have attempted to show the injustice, and also the injury, which they would inflict. All the help or satisfaction I have been able to obtain from our authorities was sympathetic interest in our complaint, an assurance that a faithful representation of our case would be made, but, beyond that, nothing more could be done. The result has been that higher duties have been imposed, the power to do business has thereby been curtailed, because the foreigner has been put in a position to supply his own requirements. This being the position of the case at the present time, what I have to suggest is that Great Britain shall again have, what every other country in the world possesses, the liberty to negotiate, and something to negotiate with. There does not appear to be any prospect of a change in the fiscal policy of any foreign power, and to meet this difficulty, and remedy the grievances now existing, power to negotiate should be given. There have been plenty of occasions in the past, and there will be in the future, when a British Minister having to conduct a great commercial negotiation will feel his hands strengthened, will feel he is indeed able to represent the interests of the great country whose foreign affairs he has to manage, if he can say to the Minister of the country with whom he has to negotiate: "We do not ask you to reverse your commercial policy, we do not ask you for anything that is impossible, but common justice and common fair treatment we do ask, and if we do not get it we shall take our own measures." We have evidence that foreign nations are apprehensive of British retaliation. The value of British markets is fully recognised abroad, and good results must inevitably follow a system of negotiation.

Retaliation

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I would draw attention to the vast importance of being one of the contracting powers in the making of a treaty, as the classification of the goods is no less essential than the fixing of the amounts of the duties. Classification is of the very greatest importance and in drawing up a scheme of classification, labour cost should have a very fair consideration. In the pottery trade there are about 16 classifications, but they ought to be so sub-divided as to suit each particular trade. In the year 1860, when tariff arrangements were negotiated between Great Britain and France, the classification of goods was naturally settled to suit the trade between the two countries. The classification then adopted was adhered to in the arrangements subsequently concluded between France and other powers, and thus European tariffs became specially serviceable to the trade of Great Britain, and the benefit of their provisions was secured for our trade by means of a better worded "most favoured nation" article in these commercial treaties. In 1882 the tariff arrangements which France had contracted with Great Britain came to an end, and although for a further period France still held the premier position in the making of treaties, in 1892 she ceased to take the lead in international tariff arrangements. Germany then took this system in hand, and in a short period of time concluded commercial treaties of 12 years' duration with most of the Continental powers. These treaties are framed to favour and develop German trade, which

Classification of
Goods

105 **Most Favoured
Nation Clause**

has prospered under their arrangement, as that of Great Britain progressed under the treaty system of 1860. This position of affairs has a very direct bearing on the value of the "most favoured nation" clause, which is claimed in these treaties by Great Britain in virtue of her policy of Free Trade. The free traders of this country are continually informing us that all the advantages obtained by the contracting powers who have made these treaties are secured to us under this clause, and consequently that we have no reason whatever to complain, or to be in any way concerned thereby. This is altogether erroneous and misleading. It certainly does prevent separate and specific differential treatment of British goods in foreign tariffs, but this to a great extent may be made inoperative by the method of the classification of the goods. I discovered a very striking example of this in preparing a Report on the Swiss treaty. I found in regard to the earthenware trade that Switzerland obtains her supply chiefly from two countries—Great Britain and Germany—Great Britain having a monopoly of the sanitary portion of the trade, *i.e.*, lavatory basins, closets, &c., of which she supplies $\frac{2}{3}$ of the imports, whilst Germany has a monopoly of the trade in general earthenware such as dinner ware, tea ware and toilet ware, of which imports she supplies about $\frac{2}{3}$. These two divisions have a separate classification of their own. The assumption is that this treaty will be negotiated with Germany. Great Britain, having given all, is outside any need for consideration in regard to these negotiations; Germany accordingly will make the best terms to suit her own particular interests. What can be more natural than that Germany will secure good terms for general earthenware in which alone she is interested, and having obtained that will then, under the very plausible plea of not wishing to drive too hard a bargain (as the tariff in this particular case is not framed for protectionist purposes but for revenue) yield her consent to the large increase of duty of 50 % which is asked for on the sanitary earthenware—as a concession to Switzerland—the result being that the operation of the "most favoured nation" clause would mean an advantage to the trade of the contracting power, and a menace to the trade of the country whose only claim to consideration in the treaty is that based on this particular clause contained therein. In dealing with treaties I have frequently found that where a contracting power can supply china and not earthenware, good terms are secured for china to the exclusion of earthenware; but in this particular case "earthenware" is sub-divided so as to admit of the "most favoured nation" clause being of no benefit whatever, but instead a means of injury to the trade of other than the contracting power to the treaty. This particular point is worthy of special note, as the operation of this clause can so be made as to affect the trade of this country very seriously.

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"Tare"

Another important feature in the arranging of a treaty is the matter of "tare" in the weight of the goods chargeable with duty, which is ignored altogether in many treaties, the duty being charged on the gross instead of on the net weight of the goods. This is particularly disadvantageous to the pottery trade. These goods being of a fragile character, have to be packed in strong and necessarily heavy packages to stand the strain of a sea journey which entails several changes and rough handling of the goods during transit. These packages represent a "tare" varying from 15 % up to 65 % on the gross weight, according to the nature of the goods contained. Continental countries are in a position to send their goods direct by rail, and can thus pack in light packages, and in many cases can pack loose in truck, thus escaping with a light tare in the case of packages, and paying only on the net weight of the goods when sent loose in truck. The difference under these conditions constitutes itself an important differential duty against the trade of Great Britain and in favour of our Continental rivals. In the framing of a treaty the points of importance are in the following order:—(1st) The classification of the goods. (2nd) Rates of duties. (3rd) Allowance for tare. (4th) Customs regulations generally. The duties on pottery and earthenware are principally specific. *Ad valorem* is very exceptional.

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Foreign Methods

In the foreign countries competing with us trade is carried on on a large scale. Those manufactories which I have visited (and I have visited most of the important potteries throughout Europe, and have investigated their methods of manufacture) were selected by me for some special excellence or merit, and were of the very first rank, and accordingly well up-to-date. That is the reason why they capture the market to a great extent; but if we had the security they have there are plenty of people in our district who would invest capital in the same manner. We have large concerns in the potteries and people who are prepared to furnish any amount of capital when they can see that it is going to be productive of good results. In some of the older potteries in England the plant is not quite up-to-date, but many of our trades are of a special character, in which no machinery can be applied, consequently no alteration in plant would improve the condition. That would not apply to the great bulk of the trade we do. We have manufactories that are as up-to-date as any on the Continent. Most of the improved machinery on the Continent for the cheap production of pottery has been obtained from our own district. In one of the most up-to-date places visited, I was rather surprised to find some machines which I had not seen in our district; I asked the proprietor whether it was his own inventive genius that had suggested these, and he first of all tried to claim some credit for them but ultimately admitted that they came from Staffordshire—from the very people who supply our own.

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**Commercial
Travellers**

The system of commercial travelling is only superior in foreign countries because the foreigner sends more people to canvas for orders. They do it more thoroughly, and employ more hands, *e.g.*, the total number of commercial travellers who visited Switzerland last year was 6,531, of whom 4,463 were German. The United Kingdom sent 45 only. 6,000 people being sent about the country and paid, implies a considerable outlay, but there is no doubt they look well after the trade.

Effect of Duties

High tariffs must limit the possibility of doing trade. They either close the market to us entirely, or curtail the power of doing business to the extent that these countries are in a position to supply themselves. These foreign tariffs tend to secure the home markets to our foreign competitors because the security of trade in the home market tends to greater efficiency in production.

On Capital

The adoption of a tariff here would lead to the investment of more capital in North Staffordshire, because it would give greater solidity and firmness to trade—the trade is suffering from deficiency of capital at the present time. We have to put up with what we have got simply because we are not quite sure that that increase of capital is going to be productive of results which will justify the expenditure. The going out of firms is common in the Potteries. The capital required to start in the pottery business depends entirely on the scale

on which you commence business. Some start with a very limited capital, and have very small places. One may start with anything from £1,000 up to £20,000. Some start in a small way with £1,000 and make a speciality. They commence making something which they can get a little out of; and, if they prosper, increase the size of the place.

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We find that in every case when a tariff has been raised we have had to lower our prices to meet the increase of duty, therefore, we may say it would be borne by the manufacturer to a very great extent. Prices would not rise in consequence of a duty because the competition is sufficiently keen in our district to prevent anything very much in the way of advance in prices. A general duty of 10 % is needed with special powers to deal with special cases so that where we have evidence of goods being dumped in this country at less than cost, we should first of all raise them to the cost in their own country and then impose the tariff on that basis. The working men of our district are hardly sufficiently educated yet to know the importance of these things; and as to tariff arrangements I am sorry to say that they are very little known or understood even by people who are supposed to be informed.

On Prices

WITNESS No. 275.

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MR. BERNARD MOORE

(Moore Bros., St. Mary's, Longton, Staffs.; Manufacturers of High Class China).

I make exclusively high-class china, principally tea and breakfast services and ornamental ware. I am also a director of a large milling combination for grinding the materials for manufacturers—perhaps the largest in the world.

There has been a steady decline in the trade, prices having gone down very much. The volume of trade is less than it was, and I have very good means of knowing, because no china can be made without bone, and we are by far the largest grinders of bone in the country, and naturally notice what the imports of bone are. The number of hands employed would not be a test of the volume of the trade. Since the trade has been bad and prices have fallen great efforts have been made to cheapen production by putting in machinery, &c. Firms are making goods now by machinery, and making half as much again as they did, so that the absolute hands employed would not be a test. The amount of wages paid as distinct from the people employed is also not a good test for the same reason, but the number of ovens fired would be a very good test. There has been such a great decrease in the volume of trade that the administration charges make it much more difficult to compete, though there is practically not very much difference between the price of German and English china. The total net profits have diminished, and the remuneration has been markedly less in the common china. There has been much more competition in that branch. The cause of the change in the state of trade is the importation of foreign china.

State of Trade

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Cause of Change

Trade has decreased with the Colonies, except Canada. The other Colonies are not manufacturing but are importing German goods, not American. We can sell at the same price as the German an article that is good enough for common consumption in the Colonies. There is very little trade in cheap china with foreign countries.

Export Trade

English china is made of three materials—bone, stone and clay. All the clay comes from Cornwall, and it, and also china stone, is being exported largely. An important change is likely to take place next year (1905) in the supply of china stone, which will raise the prices from about 14s. to 17s. 6d. a ton in Cornwall. There is a considerable addition to that in carriage, so that when it is ground and in the pottery it is worth 55s. a ton. There is no waste in grinding, it is all used. It is cheaper to grind in the pottery than it would be where the stone is found, because we are near the coal. A small amount of grinding is done in Cornwall with water, but manufacturers prefer to buy locally ground material. Foreigners have no advantage over us as regards raw material, or in the sources of supply. Roughly speaking we use 20 or 25 % of china clay in the manufacture of china. China clay is found in a great many places, and the exports from England to America will decrease simply because they have clay themselves. But they have to learn how to use it. Clay varies very much. Speaking generally it is a hydrated silicate of alumina, but one clay may have an excess of silica in it, another clay may have a certain amount of alkali in it, and in order to use the clay this must be found out. It would not do to merely substitute one for another. Nowadays, owing to technical education, a man ought to be able to tell the difference, but there are not very many men who could. There is an ample supply of china clay in many parts of the world, and we have by no means a monopoly. America can furnish a large quantity, but a great deal of English china clay is used because potteries have been established with English managers, and when they have gone over there they wanted to work on the English lines, and it was much easier to start with a china clay they knew. China stone is a semi-decomposed granite, the same material as the "Pe-tun-tsze" of the Chinese. It is the same granite from which the china clay comes, half disintegrated, and is a bi-silicate of alumina with a certain amount of felspar in it. We used to have almost a monopoly of china stone, but that has disappeared to a certain extent though we seem to have still a monopoly in certain kinds, not equally but still very essential, particularly that known as the hard purple stone, the more vitreous kind, which is not so plentiful. There is plenty of the other sort. China of any quality cannot be made without china clay, but it could be made without china stone simply because the china stone could be built up. It is certain now that the stone is likely to increase in price, and it is quite impossible now to buy for next year except at a very considerable rise. Our competitors get the raw materials quite as cheaply as ourselves, but the price is rather difficult to ascertain. They have other sources

Raw Material

China Clay

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China Stone

113 Bone Ash

of supply, but with the exception of Austria they get a great deal from England. An ordinary bone, fired at the most intense heat, will become like a piece of china, except that it will be dry on the outside, and will become transparent where it contains the soluble salts. Nearly 60% of china is bone ash, and we can fire it at such a heat that it becomes translucent without melting or bending over. There is very little bone china made at present except in England, and a little in America. We get bone from South America as a rule. It is bone that has been used for fuel; the ash comes over here and is ground. There is nothing peculiar about South American bone. Certain manufacturers use nothing but English bone, but it is more expensive. The bone from Rio Grande is very much better than the bone from the River Plate, which is almost exclusively beef bones. (Horse bones are not so good as they contain a small percentage of iron and do not burn as white as ordinary bones.) The difference arises in consequence of the way they treat it. In Rio Grande, when the meat is killed, the bones are burned at once, while the practice in the River Plate is to leave them in a big heap till the end of the season and then burn them. In Rio Grande they are not burned to destroy them but as fuel. Occasionally they burn bones to get rid of the fat, but generally they are used as fuel instead of coal under the boilers to melt down tallow, &c., and the ash from the freshly burned bones is better than that from the bones that have been allowed to partly decay. There is no doubt about the supply of bone as it is a waste product. An immense quantity comes over as manure. That has been kept fresh and clean. One bone is really as good as another if it is fresh, *i.e.*, a cow bone, but at those places where they kill a great number of mares, as they do for the tallow, if these bones are mixed with the cattle bones the product is not quite so good. As received it is only partially burned, and the more it is burned the better it is. The importation of bone is, perhaps, the best criterion of the condition of our particular trade. It would be extremely difficult to derive any figures from that unless one were in the trade, because bone is imported for other purposes besides china. The amount imported for manure is probably 70,000 tons a year, whilst the consumption for pottery purposes is not more than 5,000 or 6,000 tons. There is no way of getting accurately at the amount imported for the china trade, though it all has to be ground in this country. The most reliable returns would be those of the Liverpool brokers, as all the bone comes through three men in Liverpool. The amount ground for the trade would be very difficult to discover, for the bone grinding firms change, and while we might be very slack another firm might be busy. The only reliable figures would be the totals, and these would be quite impossible to obtain.

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Fuel

Fuel is an important item of cost. Including the labour on coal I could make £10,000 worth of the better class of china for £500 worth of coal in my own factory. That is about the proportion, but not by any means a general figure. The cost of coal would be much more for cheap china. We have been paying very high prices for coal, 13s. 10d., and about 2s. for "slack," though the pit is close to the factory, *i.e.*, a higher price in Staffordshire than they have been paying 100, 200 or 300 miles away, for the same coal. That is not a question of carriage but of the coalowners combining against us. I am interested in a manure works in Wales, and have been buying Staffordshire coal there for less money than I can buy the same coal for my own factory.

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Lead Glaze

In the inquiry as to the use of lead in pottery, I took an active part with Mr. Burton as a witness for the manufacturers. We use less lead in glazing than foreign countries as far as general manufacture—not china—is concerned, but the foreign china and English china are two distinct things. One has a felspathic glaze and the other has not. In consequence of the greater laxity abroad there is more lead poisoning in the factories than in ours, and there are statistics to bear this statement out; but there has been no compulsory registration of cases of lead poisoning abroad. I do not complain of the restrictions in this country; to a certain extent they were quite right, they have improved the condition of the workmen and will have a very good effect indeed.

Hard Paste China

The ordinary German china is made from clay and felspar. The system of making china in England and Germany is quite different, that is, the difference between hard paste porcelain and bone china. Bone china is fired at a lower temperature to commence with, and glazed at a still lower temperature. Hard paste china is fired at a pretty high temperature to begin with, and then at the melting point of felspar in the second firing. Ours is fired up to the greater heat the first time.

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Foreign countries are making absolutely the same kind of china that we are, but we could not make their china. Their kind of china is not in itself any cheaper to make than ours, and it would be no advantage to try and make hard paste china in England. Many people who do not understand it say that is what we ought to do, but there are technical difficulties. We should have to train up a different class of workmen to make it. In hard paste china foreign countries have natural advantages as far as fire-clay is concerned, and in that we have no particular source of felspar here and should have to import it all from Norway and Sweden, as we do now. Norway and Sweden have no clays likely to compete with our own. They get their clays from England, but they have the felspar on the spot. Felspar is found as an absolutely constant crystalline substance, not in any way mixed up with granite, and consists of 6 equivalents of silica, 1 of alumina and 1 of potash or soda, the only varieties being potash spar, soda spar, or soda lime spar. We have not the fire-clay for the saggars—*i.e.*, the crucibles in which you fire the china—that would be necessary to produce hard paste china. We get ours from the coal measures in Staffordshire, and it is very cheap. Hard paste china to be made successfully has to be fired in a reducing atmosphere for a certain time. Our china is fired in an oxidising chamber. If the fire-clay that is used in our saggars were fired in a reducing flame the clay would turn from the sesqui-oxide to the di-oxide, the saggars would melt and would not stand the heat. That would be one great difficulty in introducing the hard paste.

Labour and Wages

The amount and continuity of employment in our trade of recent years has been irregular and the number of hands has decidedly decreased. The workers have suffered to the extent of 25% in their wages through having to work short time in consequence of business being intermittent through foreign competition. This began 4 or 5 years ago, and in some branches the foreigner has taken nearly all the trade. Our labour is for the most part women. The potters, as a rule, are men, except in certain light work, such as putting on the handles. The women do painting, and a certain amount of the printing. Men printers work the presses, and the women

transfer the paper to the ware. A woman gets 10s. to 18s. a week according to her capacity. Wages vary and there are a good many highly paid workmen. There has been no material change in the rate of wages and no decrease in the amount earned by a man working full time. Personally I think there has been deterioration in the quality of the labour. I have managed a works for 35 years, and men seem to take less interest in their work now. As long as they can get their wages and turn out so many hundred dozens of cups they are satisfied. I remember the time when an oven was drawn the potter looked at his work, and was pleased if it came out well; there is less of that kind of thing now. The unsteady nature of the employment has ceased to attract lads and the consequence is that the trade suffers. Manufacturers are not entirely free from blame for that. In the old days a man gradually worked up so that he could make pretty nearly everything. Now as soon as he can make a teacup they let him start and do that, and he never can make anything but a teacup. He does not learn the whole trade. There are no restrictions by the workmen's Union. We are always making potters. There is a large number of apprentices made every year, and it does not necessarily follow that because there has been a decrease in total numbers fewer potters are being made. We indenture our apprentices, but it is becoming more and more difficult to get good men. The gaps are not being fully filled up and men have gone to other trades; some have gone abroad.

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Taking all things into consideration the British potter is the best potter in the world. I have had some experience abroad at Sevres, and a great many places, and there is no comparison between the good English potter and a foreign potter. The best American potters have been Englishmen who have gone over. There are many instances of English managers going abroad. The whole of the American trade has been established in that way. A great many men are going over now, even to the Continent. They go because they cannot get on here. This applies more particularly to the china, but there is also a very large earthenware works that has just moved to the Continent. They have invested £50,000 in Germany. Though a great many English people have gone over to America and attempted to establish works there I do not know of any works that have gone over bodily. There is more push and go in American workmen. In an English factory you find a man who drinks a great deal, and tries to live on his reputation as a potter. They would not stand that in America; he would have to do his full share of work.

Emigration of Labour

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Technical and commercial training does not produce a superior class of workmen here as it is believed to do in foreign countries. There is too much tendency to exaggerate the value of what is called scientific training. The potting methods, however imperfect they may be, have been arrived at as the result of experience, and by the exercise of the same mental functions employed in scientific research. We want as much scientific training as possible. My experience is that the technical training that has been given has been absolutely invaluable to a great many men, and we cannot have too much of it; still the practical result has not been to give us a better class of workmen on the whole. Practical knowledge of chemistry is required for mixing the different qualities of clay. One man with a thorough knowledge is wanted, not 50 with a smattering. We want more apprentices who will learn the trade thoroughly, and then technical education will be of immense benefit to them as it will make them use their experience better. Designing and the art part of our work is a very important branch, and there the technical training has done a great deal of good.

Technical Education

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We get all our materials by canal, but the canals are owned by the railway companies and there is no genuine competition, for the rates by water and by rail are practically the same for potters' materials. The railway companies do not do all that they might. I applied personally for through rates for 100-ton lots (a train load), and the manager of the North Staffordshire Railway replied that they did not want 100-ton lots—that 5-ton lots were quite sufficient, and would not give any reduction for the quantity, though they do so to the foreigner. We bring up 25,000 tons a year from Cornwall and Liverpool, and we applied for through rates from Cornwall for certain kinds of stone, but it is very difficult to get any reduction in rates from a railway company. They have it all fixed, on the basis of a 2-ton rate, and it is the same whether it is 2 tons or 100 tons. All our stuff comes into Runcorn. The rate for bone from Runcorn to Stoke, possibly 50 miles, is about 10s. 6d. A vessel will bring 300 tons of bone ash from South America to Liverpool or Runcorn for about 17s. to 21s. a ton.

Canal and Railway Rates

Our local rates are very high. In Longton they are 10s. in the £, in consequence of the great amount of void property. People abandon their properties, do not pay, and leave the place, and they are unable to collect about 35% of the rates. They are compounding with the landlords now for a discount of 25%, the landlords to pay the rates and collect them. The freeholds do not belong to the cottagers, but it has been a custom for the tenants to pay the rates, and they flit about from place to place and so evade payment.

Local Rates

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In well-managed factories here the method of accounting is as good as it can be. Dead charges have increased very much indeed, and, speaking for my own factory, I have paid 25% or 30% less wages. If the factories could get more work to do most of them could turn out 50% more goods, practically without increase of establishment charges; there are very few that could not. Assume that I had a protected market, and was able to keep my factory going to its full capacity, establishment charges could be reduced by 20%, thereby reducing the whole cost probably 10% all round. I differ from some makers as to the proportion of the different elements of cost. My figures show that establishment charges vary from 25 to 45%, and labour from 50 to 70%, leaving quite a trifling sum for materials. This is particularly the case in white china. If one were putting £10 worth of gold on a plate it would of course alter everything. These figures are for white china without gold. The bearing of this on English labour is that if you displace £100 worth of cost price of bone china it displaces 95% of English labour and interest on capital.

Prime Cost

Designs can be registered, but the registration laws are very curious. At one time we were bringing out quite 500 or 600 designs in a year. We register our successes; to register everything would be throwing money away. Registration takes time and costs from £1 to £2; it used to cost more. Besides it means furnishing drawings, and the probability is that some one is dissatisfied with them, and sends them back for some trivial alteration. They must be registered in every country in which protection is desired. We only register in

Registration of Designs

121 **Registration of Designs**
—continued.

England, and it is not much use when it is done. It serves chiefly to frighten people, though occasionally one gets a case. If the cheap imitations can be found in time they can be stopped, but unfortunately they get distributed all over the country and a comparatively small alteration will be quite sufficient to nullify the registration. It is difficult to bring it home to the person issuing the article, as it passes through many hands. As a rule it is too late, the damage is done, and further, the people to be proceeded against are sometimes your own customers, and much offence may be caused in that way. Every original design should be registered, simply because it is an original design. Possibly the difficulty could be got over if the agent of the manufacturer of imported foreign goods were compelled to deposit a certain sum as security against the possibility of imitations. That is to say, if he wants to trade here he must trade fairly, and give security for fair trading.

“ Piracy.”

We have our own designs and make according to them, and in this connection we suffer enormously from unfair competition from the Germans. I had 40 models that had cost me £400 or £500. A foreign firm bought samples, copied 38 of them and travelled with my samples before they had time to get their own out. Out of 7 or 8 designs the probability is that only 2 or 3 are a success. The Germans wait till they find out which is a success and then copy it, and injure the trade by putting very inferior copies on the market. The competition is not direct, but as soon as there is a cheap copy the good shops will not buy our originals.

122 **Mark of Origin**

It is not now necessary that the goods should be stamped with the country of origin, but all goods (each piece) ought to be so stamped. They were so stamped for a long time, but the practice of stamping packages took its place. It does not affect my manufactures much, but some of the makers of the cheap china consider it a very serious matter. Nearly all our articles are stamped with the name “ Moore Brothers ” ; that is known in the trade. Sometimes we put a full address on. I cannot say that I have ever found attempts to copy it.

Foreign Advantages

Foreign countries have no advantages in better machinery, and foreign manufactories are not on a larger scale ; as far as earthenware is concerned there are much larger factories in England, or quite as large as anywhere abroad. Foreign countries have these advantages in respect of processes of manufacture. They work very much longer hours, the wages are much lower, and they have fewer Government restrictions.

Dumping

The duties on china of various kinds vary from 60 % in America to 20, 30 and 40 %, and in some countries up to 120 % or 130 %, as in Russia. The British policy of free imports enables foreigners to dump certain things ; and it does more harm than that, for if a leading line can be dumped in a country like this, it gives the manufacturer and the traveller a chance of selling other things on which there is a good profit, and that is where we suffer. They have something to open the account with. The foreigner has a home market that is secured to him, and is able to dump surplus stock on us. For instance, if the dumping ground existed I could dump 50 % of stock at 30 % under the sale price in England. I could afford to take 30 % less, and make 10 % profit on it. If my establishment charges were 40 % and I could make 50 % more I could sell that at 30 % less, and have a profit.

123 **Duties:**

A comparatively small duty, in my opinion, would stop dumping. A man will take the risk of sending stuff in if he has nothing to pay. It will fetch something here. A month or two ago a well-known firm were selling a registered design at 16s. a dozen. The Germans made copies and sold them in 5 or 6 towns in England and Scotland at prices from 3s. 6d. to 12s. 6d. a dozen for precisely the same article. That shows that the agent had been told to sell at any price he could get ; he got 12s. 6d. in some places, and 3s. 6d. for the very same thing in others. A 10 % duty would be an immense advantage, without raising the price to the consumer. I should be glad to see 25 %, but an all-round 10 % duty based on value would do an immense amount of good. There should be a system of appraisal similar to that in America, based on the value of the goods as sold in the country of production. If I were willing to sell a £5 article for a sovereign in America I cannot invoice it at a sovereign, and pay duty on that. The bulk of the imports into this country are the low-priced articles in china.

The workpeople in Longton as a whole are strongly in favour of some reform in our tariff. Personally I am not politically in favour of it, but I do not make it a party question and think our people are willing to allow common sense to rule their bread and butter.

Preference

The increase of trade with Canada since the preference has been given has been much more rapid. Still they always have taken a certain amount of British china in Canada.

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WITNESS No. 276.

MR. ENOCH MASSEY

(E. Hughes & Co., Opal Works, Fenton ; Manufacturers of Common China).

We do not make higher grade china and no ornamental china, except a little small heraldic ware. The manufacture of common china means the production of tea services at anything under £1 per set ; over that we begin to class it as high-class china. Our average price for a tea service would be about 10s. a set, whereas, probably, Messrs. Moore's average would be 50s., they beginning at a price that we finish at. We keep a class of workpeople that can turn out a great bulk of stuff at a cheap rate, and we can sell it at a cheap rate, but the workmanship and materials are not so high in class and quality as those used and made by Messrs. Moore ; still, they are very presentable and nice things. We use the same materials, but a cheaper grade.

There has been a steady decrease for the last 8 or 9 years, a very perceptible decrease in the output. Of foreign trade we have practically none in common china; there is a little with Germany, but very little. We have a good trade with Canada as there is no china made in Canada of any class. Our trade with South Africa has decreased. Unfortunately there is a sort of resentment on the part of the Dutch against us, and they will not buy English goods if they can possibly do without them. We have practically no trade in South Africa now where we had a very good one before the war. The main thing that will help us there is the dying away of prejudice. The Dutch prefer to buy the German goods, at least that is the reason for not buying that is given to us by the houses in question. It is a national sentiment, a little bit of resentment which time will efface. A Dutch farmer does not know the difference between German earthenware and British, but if it is pointed out to him he would always take the German, and the trader will always consider the prejudices of his customers. The traders of the country are, in our particular business, nearly all Germans or Dutch. The South African trade will come back to this country eventually, but at present it is very disappointing. Some of our smartest men went over there after the war and found they were able to do very little business indeed, the net profits have decreased very seriously. Our branch has suffered more heavily than the better-class china. The failures and the poverty we have in the district attest the fact that profits have practically disappeared.

State of Trade

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The English workman leads all workmen in pottery, there is no doubt about it, though at present he is deteriorating; he is getting into a careless, slipshod method of working owing to the depression in the trade which somehow reaches the man. We have not the same control over our workpeople now that we had 20 years ago. When I was a workman at the bench 30 years ago, there was a very much keener grip over them than there is at the present time. For instance, many apprentices at the bench had to attend the art school for 4 nights a week and to take their register at the end of the week to be shown to the employer. We cannot put that in force now. The boys want to play football and cricket and not attend school. If trade were better and we could keep a full staff of workpeople, we could offer such inducements that we should get a better class of boys as apprentices. A fully staffed works can be managed very much better than a half staffed one; where some of the benches are empty there is always carelessness amongst the workpeople. There has been practically no material change in the nominal rate of wages. We are not fully employed in our mills and factories by any means, but the workmen employed at our factory are kept going 6 days a week. We work on this policy, that of the producers, the actual makers of the ware, we have exactly half the staff; we work with half the staff, and work full time. The secretary of the Cobden Club was down some time ago, and I took him round our factory, and showed him that almost every alternate bench was empty throughout, but those occupied were working full time. Our standing charges are thus proportionately higher. Our factory is running full time, with the same steam power, the same heating, the same rates, the same taxes, and the same interest on capital. There are a very large number of potters unemployed at the present time. They are not all working under the conditions that we are. We have worked with half a staff on full time rather than a complete staff on short time; many are keeping a full staff and working short time. As a whole there are considerably less workpeople employed in our district now than 20 years ago. Of the balance some have drifted into other businesses; a great number have gone to America; many have become chargeable to the rates. We are talking of increasing our parish workhouse now, though at the present time it is one of the largest in the country; it is crowded. We have thousands of people in Longton out of work. The workpeople beyond doubt are realising what the foreign competition is doing for them—driving them into the workhouse and taking away their bread.

Labour

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Salaries and wages in the United States are considerably higher than here. In other countries they are rather lower. A man who receives the higher salary or higher wages does more work, but he is paid a greater price for his work. I have assisted in the management of a factory out in America at one time and know that labour costs very much more considering the increased output; it costs 25% higher in America. Practically there are few American workmen in the pottery, they have had almost all their workmen from England. They are training their own apprentices now, but they are trained under English workmen and are practically as good as the English when so trained. I was employed at a large factory out in America for 2 years and the proportion of Americans in that factory was very small indeed, they were principally Germans, Austrians and Englishmen. Speaking of the relative value of the class of work made by one man as compared with another, it took more wages to pay 5 Englishmen than it took to pay 6 of any other nationality, and their work was very much superior.

Wages in America

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I have been a member of the committee of our technical school for a good many years, and have a very strong feeling that in our district at least the technical and art education that is given in connection with South Kensington is not by any means the best suited to our trade or at least not so well suited as it might be. I think it would be best for our school to break with South Kensington training and to work it on our own lines as a school of ceramics. The South Kensington method is too theoretical and goes into branches which are of no use whatever. I made my son apprentice to our firm to teach him his business, believing that the potter is best who has worked his way up from the bottom. I wanted him to learn modelling and sent him to the art school. The only models given him there to copy were absolutely of no use to him; instead of learning to model a cover, dish or teapot they started him on a foot, an ear, or a hand, and something of no earthly use to him. Our boys are never taught to use the tools that they will have to use at the bench when they come to work, but are taught to use a totally different kind of modelling tool and to model with their fingers on a set block, whereas we model on a whirler, and use mechanical power as far as we possibly can to help.

Technical Education

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The same may be said of the teaching of chemistry. There is too much prominence given to branches that have no application whatever to our own industry, and the chemistry of our own industry is in a large measure ignored in the syllabus of the schools. I cannot speak very much of technical instruction in the United States, but have a better knowledge of that given in Germany. There it is very much more complete and to the point. The branches of education are made to correspond with the needs of the district. There is always an affinity between the education given and the branch of manufacture carried on in the district.

The British supply of raw material is practically constant, we have had no trouble. We are anticipating a rise on one of our materials—china stone, but that is not a very serious matter. That particular article is being exported in very large quantities indeed to the United States where there is none, and there is only a limited supply of it in this country. America must import it from England or use felspar, of which they have plenty, but that would need very careful alteration of their formula, substituting one material for another—a most serious matter for the potter. Even substituting one grade of china clay for another is a very serious matter indeed, that is the reason why all the English potters going to America prefer to have imported English material, the use of which they are accustomed to, rather than use their own which is close at hand, because, though their own may show good results in their experiments and may really show fair results in manufacture for a time, the ultimate results may be disastrous. There is plenty of china clay in France and any quantity in America, and of a very good quality indeed. I have taken numbers of samples from there of different kinds. There is also plenty in Ireland of a similar quality to the Cornish which has never been worked. As one of the commissioners at the Cork exhibition, it was my duty to look into the exhibits of mineral deposits, and there was china clay produced from 4 different districts in Ireland of very fair quality.

A very small quantity of unfinished goods has been exported at any time, chiefly white ware, ready glazed here, sent abroad for decoration over the glaze. Some years ago there was some trade with the potters in America, there being a demand for a higher class of goods than they could produce themselves; and a small quantity of good ware, really high-class ware, was imported from this country, and the decoration added there. That was when there was a very wide difference between the duty on undecorated and decorated ware. When that difference disappeared our export, small as it was, of that undecorated ware, gradually dropped away, and now it is not worth consideration. The great majority of the decoration is over the glaze and baked in afterwards.

We could increase our output to-day 40% if we could find a market for the goods, and that would be general in the trade; some firms could double theirs, they have the plant and could get the workpeople. We have all the plant at our works needed for making at least 40% more than we are making at the present time. If we could keep the factory fully employed it would mean a large proportionate reduction in our standing charges, and that would also mean that it would not be necessary to increase the price of our goods; on the contrary, cost of production would be less, and we should be able to sell cheaper.

The railway companies in England are undoubtedly inclined to give a preference to the foreign manufacturer on both large and small quantities. The present rate for carrying the imported German china from London to Bristol, about 120 miles, is 10s. a ton. The carriage of English china from Stoke-on-Trent to Bristol, about an equal distance, is 31s. 6d. A case of German china from London to Longton was charged through at the rate of £1 a ton, the same case was packed with English china and sent back to London, and charged 32s. 6d. per ton. The exact rate they were charging the foreigner from London to Staffordshire was not merely a proportion of a through rate for the entire journey, but it was what the railway company in this country actually received. The same between London and Bristol, the actual amount received by the G.W.R. Company for carrying German goods from London to Bristol is 10s. per ton, and they charge us 31s. 6d. for an equal distance. If Messrs. Doulton were to send china from London to Bristol they would not get the 10s. rate, their rate would probably be about 30s.; that low rate is charged to compete with the steamers. There is no doubt about that, but how the through rates into the inland and Midland districts come to be given I cannot imagine. There is not that wide difference between them that there is between the points where railways have to compete with steamers, the difference there is very marked. We had a case at our Chamber of Commerce meeting where one of our members complained that he had sent out some goods to New Zealand and was charged £2 a ton by measurement on a certain English boat, and the same boat carried a consignment of German china at £1 8s. 9d. per ton. In the glass trade it has been just the same. The expansion of British exports of manufactures to the Colonies would overcome the difficulties alleged to exist in regard to return freights. The deterioration of the trade would be diminished by improvements in means of transport. I have a very strong feeling that the canals, which are so important to our industry, ought in some way to be got out of the hands of the railways and nationalised. Certainly water transit ought to be improved; one of the main advantages that our competitors on the Continent have is good water carriage. I cannot tell what it would cost to bring a ton of our class of goods from one of the competing factories in Germany to London as against our cost from Staffordshire, because rates in Germany are kept so entirely secret. I have just been over to Rotterdam and made all the inquiries possible, but can get absolutely no information. Stuff coming down by water to Rotterdam in huge 1,000-ton barges, is transhipped there and brought to London. Some of our English potters are transferring their factories. A large firm in our district has built a very fine one close to the waterside in Germany with the object of getting their goods into the London market cheaper than they can by remaining in Staffordshire. Thus two of our largest and most energetic manufacturers in Staffordshire are simply transferring their establishments to Germany, still intending to work for the English market, because of the double advantages of cheap transit and cheap labour. In one case the old firm continues business here, and they are taking only the principal men of each department over to the new establishment in Germany.

With regard to the different elements of cost, the proportion of labour, material, and the like, estimates might be very misleading because some potters grind their own materials. At our factory we do not grind anything, we purchase all our materials from the milling company ready ground. The proportions curiously divide themselves into three very nearly equal parts: labour 33%, establishment charges 33%, and materials 33%, that is including gold. I have taken as the basis of my calculation the finished ware, whereas in Mr. Moore's calculation he took the undecorated ware. Practically, in making common china those are the proportions where materials are purchased ready ground and prepared for use. The majority of the china potters do not grind, it is cheaper to buy.

Foreign countries have an advantage in respect of processes of manufacture, in cheaper carriage, though I cannot say how much cheaper, cheaper labour and longer hours, though this advantage is gradually disappearing. As to the mode of manufacture—the processes, the mills and factories are practically the same. Many of the best factories on the Continent have been fitted up by a firm from our own district, and they have been built by the foreign workmen at a lower cost than they could have been built in England. In our processes we are quite up to the level. We have about the finest factories in the world; there is nothing finer than our best equipped factories in the Potteries.

Foreign
Advantages

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The Board of Trade figures do not distinguish in any way between common and better-class china, and up to the present year they have not distinguished even between china and earthenware, it has all been classed together. In the Longton district we have worked out figures which show that what there is of depression of trade has affected us rather more than the earthenware makers. There is no doubt on that point, and there is equally no doubt whatever in the minds of everybody connected with our trade in Longton that though the Board of Trade returns of imports speak of china and earthenware, $\frac{1}{10}$ ths of the imports are china. We distinguish between china and earthenware, in that one is translucent and the other is not. There is a semi-china which when fired up to a very great heat indeed becomes more or less translucent, but only faintly so. It is generally classed with us amongst earthenware, but the translucent china is very easily distinguished from that. In earthenware we can get very good substitutes for china and much the same design. The best class of earthenware is really better than the commonest class of china in appearance, and for wear too; and there is some earthenware which is very much higher in price than common china.

Board of Trade
Returns

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Nothing less than 25 % duty will give us a fair grip of the trade within our own shores. 10 % would do a great amount of good, but to give us practical command of our markets and still not give us power to raise the price of our goods, 25 % is absolutely necessary. If the duties were carefully levied we should get a better trade, and prices would not be advanced to the home consumer. The expansion of trade would control that.

Duties

Even that large duty would not have the effect of generally raising the prices in any way. It would prevent the cutting to get particular orders which now exists, though that cutting rate does not reach the consumer; to the consumer it would not raise the prices in any degree.

Effect on Prices

If we could produce double the quantity we should be able to take 10 % off the charge to our customers. In other words the effect of the duty would be that we would not raise our price but could reduce it. Foreign imports would decrease very considerably with a 25 % duty, but nothing would keep them all out. I am prepared to admit that the foreigners make a few lines that they would still beat us at even with a 25 % duty. They are goods that are very difficult to produce with our clay, and very easy to produce with theirs, and therefore cheaply, and we should never keep those out. These articles are very limited indeed.

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There are plenty of our skilled workmen that would quickly be in the business; capital would soon be found for them if ours were a very good paying business. Assuming we got to-morrow double the amount of orders in the district we now have we should be able to find hands to do the work. It would mean a rearrangement, putting men up from inferior into better positions, bringing other workpeople in below and gradually working the staff up; it could be done very quickly. I discharged a man some short time ago at 50s. a week wages. He was out of work a long time, and I find now he has gone to a blast furnace near our works for a guinea a week as a labourer. He would be very glad to get back to his place. I should have him back if I needed a man.

Effect on Labour.

It matters little whether the duty be *ad valorem* or on weight. Most of the duties imposed against us on the Continent are on weight, and therefore in saying what the duties are abroad we have to speak with reserve, because they vary with different factories. The duty would be very light indeed on Mr. Moore's goods in Germany and very heavy on ours. It is 10s. 2d. per cwt. In the case of some of Mr. Moore's goods this is an infinitesimal duty; with us it means about 33 %. I take a pound's worth of clay and perhaps spend £1 in labour on it where Mr. Moore spends £10. I should not object to a duty by weight, because that would be an advantage to my trade; but makers of high-class ware, with justice on their side, would say it ought to be *ad valorem*. Those are the only two possible ways. There is this about *ad valorem* duties, there must be very careful appraisalment. In America there is very careful appraisalment, and it works very well there. The mere fact that we see as we assert, that 90 % of the imports are china, while they are still being classed by the Board of Trade as 50 % china and 50 % earthenware, shows the necessity of more careful appraisalment, more careful discernment anyhow than there is at the Board of Trade at the present time.

Ad Val. and
Weight Duties

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The preferential tariff which has been given us in Canada has worked such wonders for our business that it would be a good thing all round. An extended preferential arrangement with the Colonies would do good, especially in Australia. In Australia we had practically the trade in our hands until some 20 years ago; gradually the Germans have crept in until a very large proportion of the trade in cheap china is done by them. They have had considerable help from their government in cheap shipping arrangements.

Preference

The trades union leaders do not realise the causes of loss of employment. In our district they are free traders; strange to say there is one prominent exception who is speaking very strongly indeed on the subject, but trades unionism amongst the china workers is not very strong, nor are the men likely to follow the leaders of the unions; they are thinking for themselves in the matter. I do not know a single man in my factory that would declare himself a free trader, and that is typical of the district; the empty benches are too strong an argument against them.

Trades Unions

WITNESS No. 277.

Mr. HERBERT J. COLCLOUGH

(Longton and Fenton, Staffordshire ; Manufacturer of Common China).

I attempt to manufacture for the million. I endeavour to reach that class of trade which buys largely. My output is comparatively large, and I am always seeking orders in bulk, and endeavour to meet the demands of those who want the cheapest stuff possible. We do not make "Improved English 'Queen's White' china" largely, but try continually to make it in bulk. We manufacture for the tea and breakfast table, but not the dinner table nor the bedroom. The earthenware makers are now making very great incursions into our trade, and are competing with us very closely in the manufacture of tea and breakfast ware.

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State of Trade

I have been in the china trade the last 7 years, but during a part of that time, up to 1900 my output was only about half what it is now, as I doubled the size of my factory in 1900, and I had no difficulty in obtaining orders to keep the factory running full time. Since Christmas 1901 I have not worked more than two-thirds time. I have reduced the number of hands, but those I have I keep moderately employed and could turn out as much again as now, though that would be running at high pressure. The normal output of my factory is nearly 50% more than we turn out at present. Some of my former hands have left the district or gone into other occupations, many of the unemployed have emigrated, others have gone labouring and picking up odd jobs; many of them are walking about the greater part of their time; some have gone into the Poor House, and generally they are in a very bad way. They would go to the coal mines but the mines are necessarily inactive when we are slack because the potteries are the backbone of the coal trade in this district, and a reduction in the output of pottery means a reduction in the amount of coal used. In the present depressed condition of things the volume of the trade done by Longton and Fenton runs to about £500,000 per annum—that is the china trade. We have earthenware factories in Longton, but they are few; and Longton and Fenton practically depend upon the manufacture of cheap china. I get my figures from the number of factories and the probable output. There are 60 factories, and in the present depressed conditions of things they would turn out about £10,000 each, or an aggregate of between £500,000 and £600,000 per annum. Those 60 factories average about 120 hands each. I estimate the total trade of the pottery industry of the United Kingdom as between 5 and 6 millions, and we turn out about $\frac{1}{10}$ of that, and have to bear the competition that is produced by the importation of half a million pounds worth of china. We make chiefly common china in Longton and Fenton; Stoke-on-Trent and Hanley and other places produce earthenware; Stoke-on-Trent has the biggest firms of world-wide repute who turn out all sorts of goods. I know only one reason for the reduction of work in our district and that is the imports of foreign china. Government regulation has nothing to do with the decrease only so far as it may possibly increase the price indirectly, and I do not complain of it. In the home trade we do a good deal now by direct dealing with senders of orders, the trade is done usually by the introduction of agents and travellers in the first case, and repeat orders when the connection is established. We deal direct with both retail and wholesale traders. In fact we are so keen about getting business that we are prepared to trade with anybody if there is a chance of getting an order. The normal discount at the present time is supposed to be 5%. The undercutting that goes on very often takes it to 10 and 12½. Imported common china, which competes so closely with our business, is sold at any price necessary to bring it below that of the British maker; and there is evidence daily that competition is getting more keen. I have seen patterns of a regular stock line of tea-sets from Germany quite as good as anything we turn out in Longton, quoted for 6s. 8d., compared with our 8s. 6d., which is the most serious thing in competition I have seen. We have had evidence in our organisation that the selling price is higher in the German market than here. We have German travellers in Longton who come to sell the stuff. It is on sale in the shop windows, and our commission agents, who are local factors, buy very largely of German goods, decorate and sell them again, very frequently as English goods. There will be a decided impetus given to the possible competition from Japan in the near future. It is simply a question of their making to pattern to suit the various markets and establishing a factory system.

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Earthenware

Earthenware has increased during the last 2 years. It is affected very largely by the tariff fluctuations in America. The depression has not been so acute by any means in the earthenware as in the china trade. We have been hit very much harder than other people. We export largely but not so largely as the earthenware manufacturers; their goods go the whole world over. Quite half the imports of both earthenware and china are classed as china. Our trade is a tenth part of the total pottery industry of the United Kingdom, and we have to bear the competition produced by half the imports, which is practically equal in volume to our own output, and the other half is distributed amongst the other $\frac{1}{10}$ ths of the pottery industry of the United Kingdom. The importation of common china is greater than the output here; even the official figures return it as quite as great.

Exports

In Australia we formerly had the sole control of the trade, but the Germans have made very great inroads into it, and to demonstrate what it means to us, I arranged with an Australian firm to represent me in Australia last year, and naturally made an effort to insert a clause in the agreement excluding the sale of German china by the firm that was selling mine, and they said "If you insist on that, we shall have to drop the matter altogether. We sell more German china than English." I was anxious to make the arrangement with this house so I had to drop the clause. I had similar experience previously; there is no chance of getting a decent house to represent us without submitting to that. This firm told us that the German goods were being sold cheaper than we could sell ours at, the only reason why the goods sell is because they are so much cheaper; no one

claims that they sell because they are better. I have not much experience of the Cape trade—only in what I may call the better class of my productions. I had some very satisfactory orders indeed up to the time of the war, but since then they have disappeared, though trade is reviving and there are signs that we shall get some of it again. I have just made arrangements for opening an agency at the Cape, from which I am expecting better things.

Total net profits have decreased to such an extent that they are utterly absent in the case of the majority of manufacturers engaged in the china trade at the present time, and in the trade generally all branches have declined. **Profits**

The continuity of employment and the amount of work in our trade and district is extremely irregular, and has been so for some years, the number of hands has not decreased very much, but practically earnings have decreased by 30 to 50 %. I neither employ a foreigner nor buy foreign goods if I can help it. In the higher branches of work French artists are employed at some of the leading potteries, but not so much as formerly; it was general in the old times but we have good English artists now. In up-to-date works where there is an effort made to introduce modern conditions, the power is supplied by steam or electricity. Formerly the whole was done by hand power. **Labour**

Wages have not materially altered, but machinery has been introduced and the conditions have been changed, whereby it has been possible to produce a larger amount of goods at a lower price, although the sum total of the workman's weekly wages has been practically the same and sometimes has increased. At the same time he has to work very much harder, though he gets the benefit of juvenile assistance very frequently which brings his net wages up to more than formerly. For instance in the process of throwing, when done by the ancient method off the string wheel, two women were employed to attend to him; now he works his own power wheel with a lever under his foot, the speed of the wheel being regulated by cone-gearing through the lever. This dispenses with one woman and he pays the other more because she has to do a little more work. He wants more for himself for the extra attention to the wheel, which was paid for formerly in the price of the ware, and he does better because he has to work harder. **Wages**

There is very little change in the conditions of supply of raw material of British origin only the probable increase in the price of stone, which would not make a difference of above a sovereign on a turnover of £300 or £400, and therefore practically has no effect. Anything is an injustice that raises the cost of production, and though this is so small as to be hardly worth mention we fear a corner in anything we use. There was a scare some time ago in the earthenware trade about the cornering of ball clay. **Raw Material**

Technical education is extremely good if properly applied, but we have not that advantage; we should have a better chance if there was a greater reward for those who follow it up. We find a great difficulty in getting the operatives to attend the classes that exist. We have 50 free scholarships in the town, and out of 200 hands in my factory only 3 took any interest in them, and they had to be solicited. I account for the extraordinary difference in the attitude of mind between the English lad and the American in this respect by the lack of security in the trade. Its depressed condition brings about a feeling that there is practically no reward, this depression and despondency is remarkable in the towns of Longton and Fenton. Lads and girls are tolerably well educated at the primary schools but there is the usual proportion making use of it, and the shiftless idle ones who only think about how to get away from it. **Technical Education**

The reason why our local rates have increased in the abnormal manner they have is the herding together of families in consequence of the reduction in their earnings. I have some property and during the last 12 months there has been a re-assessment of the district, with a further increase in the rates, and 25 % of my tenants gave notice. One was a married man with a family, and he was going to live with his mother because they could not afford to keep separate houses. Others have gone over the boundary of the borough in order to escape the rates. It was estimated a month ago that we had 870 empty houses in the borough, and we who are left, unfortunately have to pay the difference. It is rather unusual for the working men themselves to pay the rates though it is the custom in our district; but we start from the 1st October, 1904, on the principle of compounding the whole of them, with an allowance to us of 25 % to accept the responsibility of voids. The borough authorities estimate that it will be from 8 to 10 % to the good, owing to the fact that 33 to 35 % is irrecoverable under the present system. The landlords will accept that 25 % because they have no alternative. **Local Rates**

A railway official has declared to me that the companies do not give preferential rates, but through rates for goods that they would not otherwise get. The cultivation of traffic they would not have without a preferential rate is keenly watched. We have a common complaint that the preferential railway rates are a great injustice, and that the companies are generally disinclined to do anything at all for the fostering of trade which one would expect a trading concern to do. I have the right to use a railway siding which is immediately at my factory gates, and they will not allow me to unlock the gate to draw my stuff off, I have to go practically to the other side of the town to do it. It does not interfere with their traffic at all, the siding is on my factory side of the railway; but for some inscrutable reason they prefer to put the stuff down on the other side of the line and I have to go round to get it. Another firm has the right to that siding, but it is of no practical use to them. I am told they prevent us using it, because they would lose 3d. a ton if we used it. It might pay us to give them the extra 3d. a ton, but we consider it an imposition. We fetch the coal in our district from the pit's mouth by carts. The price for which an ordinary individual can get a small package conveyed, say from Hanley to London, acts adversely as regards the charges per package, because a larger package can be delivered much more cheaply than a small one, that is as regards the packing charges. As regards the railway rates, it is charged on tonnage, and as regards the keeping of stock by the customer the depression in trade has let them see there is no difficulty about procuring their requirements in small supplies, and the orders have been reduced in volume for the last few years on account of the ease with which they can get anything they want. The orders are more in number, but very much smaller, and consequently more troublesome, **Freight Rates**

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—continued.

on account of the ease with which they can replace anything they sell. We have to carry very much larger stocks than we used to do for this reason. In my case I carry a very large stock in anticipation of the demand—what we call stock lines for which there is always a sale; these are the same now as 20 years ago, and we keep them in stock for the prompt execution of orders. We have had too much in stock for a long time and should like to dump them somewhere if we could, but we could not dump without injuring our own trade because we should have to dump into the markets where our regular customers are. My agent states that we are handicapped by the preferential rates that are given to the foreign producers' goods, and that a short time ago they got goods from Germany to Australia in the same British steamer as ours at a very much lower rate of carriage. The agent referred to told me that he buys the German goods which he insisted on retaining the right to sell, and that he gets them over for a very much lower rate of carriage than ours. Where I have quoted goods "free," which I have done in one or two cases, I have generally managed to do it for about 20%, which covers the whole sea freight and if the German can get it cheaper it is a serious handicap. German goods are carried on board a British ship alongside British goods, at much lower rates by shipping from London. Our goods cost more to get to London than theirs, and from London to Australia there is not the same rate to both parties; the statement was made to me definitely that the sea freight was less for the German goods in the same vessel than for ours when shipped abroad. There is a large quantity of foreign china shipped as English and it is done very largely from London. I presume when goods are shipped as English produce freight would be the same.

146 **Elements of Cost**

As to the proportions of the different elements of cost I am somewhat favourably situated. My factory has been built within the last 7 years and is laid out on the best lines possible. My establishment expenses compare very favourably with those of the rest of the trade. I put them down at 30%, but this is an ample allowance; the producers wages are 35% and materials 35%. Where we do not grind our own materials the conditions are very different from those existing in factories where they do—but 30% with my factory is an ample allowance for establishment charges; these charges are increased in consequence of our not being able to run our factories full time. If I could run my factory fully I could certainly reduce my prices, and make a much better profit than I can now, so that a tariff would in my case positively lower prices, not raise them, unless one were inclined to seek for abnormal profits, which we should not have much opportunity of doing because we should so very soon have internal competition. As to the comparative burden of administration charges such as rents, commissions, salaries, &c., here and abroad, there is not much to be said, except that it is pretty well established that they are higher in the United States.

Foreign Advantages

Foreign countries have advantages in respect of manufactures, for it is pretty well established that cheaper labour and longer hours exist, particularly on the Continent. As to the oft-quoted complaint against the china trade, if the English public wants felspathic china, why do we not make it? If the price the Germans sell an article at is 1s. 8d., it would probably cost us 1s. for labour and 1s. for material if we made it. If the German manufacturer, whose conditions as to materials are practically the same as ours, can get the equivalent of the 1s. worth of labour for 8d., which is about the proportion that is generally conceded, we could not possibly sell the article for 2s. while the German can sell it for 1s. 8d. The class of goods that we make is a close cutting trade with the retailers who, as a rule, make reasonable profits of from 25% to 35%. Those are the profits generally estimated as the basis of their selling prices. What they buy for 3s. they would sell for 4s. or 4s. 6d.

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Commercial Travelling

Commercial travelling is better in the case of foreign countries than our own because there is a greater security or a greater chance of getting orders, and hence the travellers' expenses are more easily paid. We usually conduct our business by agencies abroad which employ their own travellers, generally on commission.

Duties

As to duties, the estimate we have all formed is 25%. That we should like; we should be very grateful for 10 or even 5 as a beginning. It has been said that there are some things which we could not keep out; there is nothing that we could not make, or that we should not have spirit enough to try at, if there was only a 25% duty put on it. But the utter hopelessness of the present condition of things renders it altogether improbable that anyone will put money into a business that they know they are going to lose by. There is greater stability in any business when we know what the foreign competition is going to be. There is no stability in the fact that Parliament in any year imposes a duty on foreign goods, because that may be repealed by an adverse political opinion afterwards, but we are quite prepared to take that risk; as far as it went it would be very good for us and when it is once put on it is hardly likely that it will ever come off again. 10% would make a very decided difference and would at once give such an impetus to the trade of our district that we could find full employment, anyway for the factories now existing. A duty even so high as 25% would not increase prices at all. The security of the consumer lies in the fact that if there is any desire at all on the part of the trade to secure abnormal profits on account of the duty on the imports, we should very soon have internal competition to regulate it. We never have been and are not likely to be short of competition. Our business is such that it can be soon brought into existence by anyone making an effort to make china and put it upon the market, and it would be something extraordinary which would give an amalgamation any chance of raising prices to an abnormal level. Even with the advantages many foreign nations have they could not continue to send their goods in and compete with us against the 25% duty, but they could get very near it in some articles. There are some few things that come from abroad that it would not be to anyone's interest perhaps to attempt to make. But with 25% duty there is nothing that comes in that our own manufacturers would not endeavour to make; and there is nothing we could not make with a 25% duty on it. There might be some little competition from abroad but not very much. We sell the goods we make because they are better not because they are cheaper, and they satisfy everyone who has them. They only get displaced in the markets because of the cheaper and inferior productions from abroad. The Germans generally speaking make a very much heavier article. There is no trade in the country which has been more damaged by the imports of foreign products than ours, and no trade that needs import duties more; nor is there any trade where there would be less increase in price in consequence of an import duty. We have an organisation called the China Manufacturers' Fiscal Reform Association, which was brought into existence immediately Mr. Chamberlain

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voiced his views on the matter. We have 60 firms in the china trade and there are 50 of them absolutely agreed on the question. Of the remaining 10, about $\frac{1}{2}$ of the partners are very favourable, but from the fact that they each have partners who generally do not see fit to throw in their lot with us they have to stand out. The attitude of the workpeople is practically unanimous in favour of the proposed change, and it was very pithily put by a working man the other day:—It did not matter paying 2s. a week more for what he had to buy if he could only get 2 or 3 days a week more work. Foreign tariffs tend to the efficiency of production in foreign countries by securing their home markets. The great point in the whole matter is that if one can only secure sufficient trade to keep the factory running, one is never afraid to spend money in order to bring oneself up to date if there is a security of a return. If you have not that, a spirit of hopelessness pervades all trades and tends to check enterprise.

Attitude of the
Workpeople

There is not the slightest doubt that extended preferential arrangements with the Colonies would be good, particularly in Australia. The expansion of British exports of manufactures to the Colonies, which might be induced by preferential tariffs, would overcome the difficulties existing as regards return freight. As a matter of course if there are profitable return freights it follows that the shipping industry can be carried on more profitably, and this would tend to the reduction of freights.

Preference

WITNESS No. 278.

MR. JOHN RIDGWAY

(Bedford Works, Stoke-upon-Trent; Pottery Manufacturer).

We, in common with the whole trade, labour under considerable difficulties owing to the fact that no statistics are available as to the home trade; this is a very great blot on our national statistics. The prevailing impression is that the home trade is in a very unsatisfactory state, brought about by largely increased imports of foreign earthenware. The pottery export trade with foreign countries has decreased and with the Colonies it has increased. The net profits in my own trade have diminished considerably in recent years owing to our not having been fully employed. Employment has been intermittent for a great many years. Sometimes it has been better, sometimes worse. The pottery industry has been very largely increased by its adaptation to various things which 30 years ago we never dreamed of. There were no such things as electrical fittings a few years ago. What we call the door-furniture trade was known, in my younger experience, as making earthenware wheels for arm-chairs, number plates, door plates, and things of that kind. But now that has developed into an enormous industry for all kinds of electrical fittings. In the same way the sanitary business in my younger days was a comparatively small one. There was one small factory in the Potteries. It has now increased to an enormous industry, not only in the Potteries but all over the country. So that when we say that we have a small increase, it is true, but we ought to have had a very large increase, because the development in the pottery industry has been so enormous. There is a good deal of competition with foreign countries in electrical fittings. And in sanitary ware it is enormous. Some years ago we used to export very large quantities of sanitary ware to the United States. Now the trade is entirely destroyed. There is not much pottery brought into this country in sanitary ware. They have copied ours on the other side, and two large firms of sanitary makers have recently established works in Germany in order to escape the tariff. The time prior to the McKinley tariff of 1890 was the high water-mark of British exports to the States. Since then it has diminished. There have been fluctuations, but in 1895, during the time of the Wilson tariff—when the tariff was reduced—we exported £955,000 of British pottery to the United States. In 1901, under the present Dingley tariff, those exports diminished to £512,000. During that period there was a revolution in English goods. The earthenware trade then first began to export what we call "thin goods"—goods made exceedingly like china, very thin on the edge and very difficult to pot. Formerly the goods sent to the States were fairly thick so that you could tell at a glance earthenware from china, but now the English earthenware exporters—the large ones particularly—have gone in for this exceedingly thin ware, which is practically a revolution. But in spite of all that they have done the exports have gone down from £955,000 to £512,000.

State of Trade

I attribute the change to increasing foreign and especially German competition. This is clearly shown in the following table of pottery exports:—

Foreign
Competition

	United Kingdom.	Holland.	Germany.	France.	Belgium.	Total.
1898	£2,040,000 31·81%	£324,000 5·0%	£2,983,000 46·52%	£923,000 14·4%	£141,000 2·20%	£6,411,000
1902	£2,095,000 26·14%	£497,000 6·2%	£3,910,000 48·80%	£1,323,000 16·51%	£186,000 2·32%	£8,011,000

These figures show that Great Britain's share of what was practically the world's exports of pottery decreased in 5 years from 31·81 to 26·14 %, or a loss of nearly 6 %. Holland's share increased from 5 % to 6·2 %.

153 Foreign Competition —continued. Germany's share increased on very much larger figures than Great Britain's from 46.52 to 48.80, an increase of nearly $2\frac{1}{2}$ %. France's share increased from 14.40 to 16.51, an increase of 2 %, while the share of Belgium remained practically stationary. On comparing the items of each country the figures work out as follows:— Great Britain increased her export trade in 5 years about $2\frac{1}{2}$ %, Holland on a small total 50 %, Germany on a very large total $31\frac{1}{2}$ %, France on a moderate total $42\frac{1}{2}$ %, Belgium on a small total 30 %.

Japanese Competition

The above figures do not include in either case the amount of pottery exported by Japan, and this has increased from £140,000 to £600,000 in about 4 years. Japan has largely exported ornaments, &c., some of them exceedingly artistic. I have a cup and saucer sold at 2s. 6d. in Liverpool, and a gilder who saw it at an exhibition said he should want 7s. 6d. for gilding it. It is a most beautiful piece of work. It is china made of the same material as German china, viz., what is called "hard paste." There is no doubt that the same revolution will take place in Japan's pottery as has taken place in her textiles. At the present time these things are made by village communities, and the product is stored and sold once a year to the men who go round to purchase it. Now just in the same way as they have gone into factories with their textile goods so they will go into factories with their pottery, and as they are the greatest imitators in the world, there is not the slightest doubt that when their labour for the ordinary dinner and toilet ware, which is the main thing, comes into contact with the much higher-priced labour of this country, the depression that will ensue in the pottery trade will be tremendous. The freights are very high, but they make very little difference in high-class goods.

154 German Competition

We are suffering very much in the home trade from certain articles—what we call side lines—being taken from us by the Germans. The Germans go in very largely for these side lines, such as egg-cups, butters, cover dishes, sardine dishes, &c., which we formerly used to manufacture, and we are being driven as home manufacturers very largely into the staple line such as dinner and toilet ware.

Employment

Employment in the pottery trade is less than it was in 1890, the year the McKinley tariff was introduced. The depression began then notably because the United States up to that time took about half of our exports. The printed branch owing to the enormous competition has been much less remunerative in recent years. But apart from that there are other branches which have also been hit very hard.

Wages

It is difficult to estimate whether the rate of earnings of workpeople in our district and trade has increased or diminished in any way in recent years because we are very much wanting in statistics. A full account of the whole of the production of the United States potteries for the last year is accessible—the number of people employed and very full details. These details are entirely wanting in our own trade and it is impossible to get them. Judging from personal experience I should say that the general earnings of workpeople now are less than they were a few years ago. The rate of earnings in our own works has followed very much the general rule.

155 Technical Education

Technical and commercial training and higher education generally do not in themselves tend to promote the production of a superior class of workmen in foreign countries. The English artisan at his best is the finest in the world. In the Potteries still exists the old system of apprenticeship. An article has recently been published by the British Consul in Stuttgart, Dr. Rose, who lays great stress upon the technical training of students in pottery. The German Government has established a technical school for pottery at a place called Höhr. This school in the day time is attended by 21 pupils with 7 professors to teach them, and their hours for learning the pottery trade are 8 per week. Contrast that with our ways. In the Potteries an apprentice is supposed to remain at his trade and pay a certain proportion of his earnings towards being taught it for 6 years, during which he works 48 to 50 hours per week. In addition to that all the scientific training the boy would require would be obtained at any of the night schools in the Potteries, which are attended by large numbers of students, and at which the curriculum is as liberal as that in the technical day schools in Germany. Our designers are as far ahead as those on the Continent. Our schools of design have been in existence in the Potteries for a great many years and they turn out very good students. In fact the highest productions of Minton's, Copelands, Worcester and others, have a decided pre-eminence over those of any nation in the world.

Raw Material

The conditions of the British supply of raw materials have remained unchanged for many years. We possess the best raw materials in the world for manufacturing earthenware and china, which we sell freely to our trade rivals without any taxation whatever. In other words the china clay in Cornwall, which is of course capable of being exhausted, is being exported just as freely to our rivals as it is being used in our own country. That is a clay that makes all kinds of paste and earthenware too; it is the best china clay in the world.

156 Elements of Cost

It is exceedingly difficult to state the proportion of the different elements of cost in our business. In calculating the net cost of all articles we always add $33\frac{1}{3}$ % for dead expenses before estimating our profit. The percentage of dead expenses in our trade is very great, because it is not one industry only, but a series, one following after another. A stagnation in our trade means a large proportion of dead expenses which cannot be avoided, hampering production and increasing the cost. That state of things is almost general throughout the pottery trade. It hits certain markets at certain times and is not universal at any time, but it is very general.

Transport Rates

There is no doubt that we suffer very much from bad methods of transport in the Potteries. For instance it costs us as much to bring our clays and to take our earthenware 38 miles to and from the sea, as it does to bring the German stuff a couple of hundred miles up or down the Rhine. The German railways and canals carry goods inwards and outwards at cost, or very little above it, and in the case of exports there is a rebate which acts as a preference to German exporters of earthenware and china. They deliberately encourage their export trade. It is part of their policy.

Commercial Travelling

The system of commercial travelling on the Continent is not superior to that in this country take it altogether, although the Germans are exceedingly pushing in their methods of doing business.

Foreign countries can get their clays up the Rhine as cheaply as we can get ours into our works. They are at a little disadvantage in their coal and also in their saggar marl (the case in which all pottery is fired, made of rough common fire-clay).

Comparative
Advantages

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It is often said that foreign countries are better equipped and better trained and that their manufacturers are more up-to-date. I very much question that. In many cases it proceeds from a wrong method of comparison. For instance a man goes down to a large place in Dresden, employing perhaps 3,000 hands and erected within the last 20 years. Then he goes to some old factory producing very high-class goods in the Potteries, and he compares the one with the other, and immediately jumps to the conclusion that the Englishman is old-fashioned and that the foreigner is very go-ahead. But the old rule holds good. If you wish to compare, compare things of the same order. To a producer of high-class goods, e.g., a 5-guinea plate—and a near neighbour of mine is constantly selling 5-guinea plates—the amount of saving that can be effected in a great many of these mechanical appliances, would be nothing in the value of that plate or in a trade of that kind. But if you are turning out plates by the thousand at 2s. a dozen, then it does make a difference.

Foreign Potteries.

German hard paste china contains a great lot of china clay; it is rather difficult to work, and they cast a great quantity of their stuff. They pour the material as a thick cream into the mould, and allow the water to soak out of it through the plaster of Paris case in which it is poured, take it out and finish it and put on the handle and spout. That is not a cheaper process. My teapot would be pressed, that is, we should form two little flat cakes of clay, put one on each side of the mould, join them together, work it out at the seams, and let it contract in the same way. That is the difference between the two processes—one is quite as cheap as the other.

Hard Paste China

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As a specimen of dumping, there is a German china teapot sold, package and carriage free in London, for 3d. A very inferior teapot of my own earthenware, made by me, costs 2½d. in wages to my hollow-ware presser for making. The German teapot cannot be made for the price at which it is sold. The porcelain of which it is made is a 50% more expensive article than the earthenware of which mine is made. The cost of firing would be the same in each case, in fact the German would be a little more. That is a typical case of dumping. It may be looked upon from another point of view, because I might import that teapot for decoration on the glaze, and then it would be simply raw material. A very large quantity indeed of these teapots is imported into this country. That 3d. article is not an instance of surplus production, it is partly a matter of having their own market secure so that they can keep on full time, by which they can very seriously diminish their cost of production. It is also partly from convenience in firing. These teapots are put into the saggars to pass through the ovens. Suppose you were placing two ewers in one of these saggars, you would want something to go between the spaces to fill up. If these spaces were empty that would increase the cost of production of the two ewers. The Germans, therefore, can produce this article, by keeping their factory going at full capacity, and using it in between in the way described, and the only cost of them is, practically speaking, the raw material and the bare wages paid to the potter for turning out the article. If we were protected in the same way we should be more or less in the same position to dump these on free markets if there were any. That German teapot is not stamped in a machine, it is an ordinary cast thing. Another example is a small cream jug, sold at 9d. a dozen. I pay 10d. a dozen for making a larger earthenware cream jug. It is done in this way. They first of all establish an agency in London; and get these particular lines well established in the market; then they cease their agency in London, and send out a circular to their customers, stating that they will now deal direct, and that they will be able to supply the goods still cheaper; and they no longer pay one single farthing towards either rates or taxes. The following is the circular referred to:—

Dumping

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“Nuremberg, January 1st, 1904.—We have the honour of informing you that in the coming spring we shall give up our London offices, and we, therefore, request you from the above date to be kind enough to send us all mail matter, remittances, &c., direct to our address here. As we no longer have travellers in England, we would further request you that you will transmit us your valued orders direct to Nuremberg, and you can be assured that we shall execute them with care and the promptest attention. As there will be less expense for us owing to the changes which we are about to make, we shall be able to quote you even lower prices than hitherto, etc.”

Having got these lines established they are known all over the country and everybody asks for them. Therefore if they can save the expenses of their London agency and do it direct at a cheaper rate they are bound to keep their hold on the market. Nobody can touch a thing of that kind. I cannot give the exact sale price of this 3d. teapot in the country of manufacture, but I should say it would be worth about 6d. or 7d. I charge 8d. for mine. There is no comparison in the quality of the two things. One is earthenware and the other is china. Some little German figures represent another instance of very cheap production. They are sold at 3s. 9d. a dozen=3½d. each, package and carriage free. There is a pattern of Austrian vase which is a wonderful one at 2s. 3d. a dozen, or 2½d. apiece. They are produced by Worcester, &c., in England, and are either of very high-class or very common—what we used to call dolls and joans. A man in quite a country district has seen some correspondence going on in our trade journal in connection with this dumping, and he sends me the following letters with a long list of articles that he gets from Germany:—

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“I have just been reading your statements in the *Pottery Gazette*, and thought the enclosed might interest you. This firm makes and sells china, brushes, wood ware, leather goods, &c. For years they have had a showroom in London and sent out travellers; this they have now given up and propose to trade direct, so they will pay no Income Tax or any other expenses in this country; every pound will go clean, except postage stamps. I have some wonderful lines in foreign goods—white, Queen, fluted china breakfast cups and saucers, 2s. 10½d. for 12 pairs; good china soap dishes 2s. 9d. dozen; ¾-pint Queen white fluted china jugs, really good, 2s. 9d. dozen; china funnels with handle, 7s. 6d. gross; ¾-pint china cream,

161 **Dumping**
—continued.

9s. gross, all carriage paid and free cases. Out of every £20 I take in cut-glass tumblers, &c., £19 is for foreign made. I am a fair trader, free to those who take ours free. I am afraid English manufacturers have a lot to answer for in the arbitrary manner they treat the trade. The crate and straw and packing business is an abomination, I am just charged 6d. for a 1d. card box to hold 1 vegetable cover."

"In reply to yours of the 3rd, you are at liberty to make use of the information I sent you in any way you please, as I see no cause for secrecy in the matter. Re the crate and straw question, how is it possible for one manufacturer to send out crates and straw at 6s. 6d. which another charges from 11s. 6d. to 13s. for. I know one stoneware house that charges 4s. for a 10-bar new crate and straw, not returnable. How do the glass works allow in full for empties when returned, and the foreigner package free, carriage free, and if the breakage is excessive will meet you in the loss. I understand many thousands of tons of English clay is exported every year to the countries who manufacture these cheap goods, and I am told could not make the goods without English clay. Why don't we put 2s. 6d. per ton duty on it?—the foreigners would do so for us under the same circumstances."

**Price of Goods in
Country of Origin**

162 Proof of dumping would be the price in the country of origin. There was a dispute in the United States about certain articles which were being exported to the United States from various parts of the Continent and an American gentleman waited upon me with a view of obtaining information. The difficulty was in finding out what was the price in the country of origin, because this particular manufacturer was exporting the whole of his production of this particular pattern and shape to one importer in the United States in a very large way, and of course it was exceedingly difficult to find out what was the price in the country of origin. The Association on the other side sent this gentleman over; he waited on me, and I sent him to my London agent who gave him some information in connection with it. He then went on the Continent and after a great deal of difficulty he found out the home price. Since his return home he has written to my agent to tell him that the Court of Appraisers in the United States have raised the price 10 %, with a 10 % fine, and as a natural consequence these goods are raised in price and are not unfairly competing with goods sent by legitimate competition. The effect of the extra tariff has been to raise the price in this particular class of goods, but only to the level of ordinary class—not beyond.

Duties

The rates of duty I suggest are 10 % for general tariff, beyond that a maximum tariff against any nation declining to give us favoured nation treatment or raising their duties against us, with a strong clause against dumping of goods exported at less than their price in country of origin. These recommendations are not so drastic as some of my Longton friends have suggested, but I think them sufficient for the purpose. A high duty is not necessary, but I certainly attach very considerable importance to the dumping clauses, because there is not the slightest doubt that it would be a safeguard. I do not fear legitimate competition, but I do fear a competition of that kind which lands you in very great difficulties.

Effect on Prices

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I do not think the effect of the duties upon prices would be very great, competition among British manufacturers tending to keep prices at a comparatively low level. Duties would not by any means stop foreign importation of crockery. But it would put it on a fairer level, and a small duty would be paid practically by the producers. If I were fully employed I could turn out of my factory 15 % to 20 % more. It therefore follows with standing charges at 33 % a further 20 % could be turned out without any cost for fixed charges, and as a consequence my whole production could be sold at a lower price. The market being safeguarded by a duty would rather tend to lower prices than to raise them.

Effect on Labour

I look upon this fiscal question as one very largely affecting the working classes and as a matter of free trade. With regard to 50 % of the costs of our production, which is labour, we have not got free trade. The working man very properly lays a standard down for himself and a rate below which he will not work. If so-called free trade is to continue his chance of obtaining employment will be increasingly less, inasmuch as he will not only be brought into competition with the cheap labour of Germany, but he will very soon be brought into competition with the still cheaper labour of Japan.

Preference

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The probable effect of an extended preferential arrangement with the Colonies would be a large increase of trade. Canada affords a very forcible example. Our exports to Canada under the preference which is very considerable have increased from £144,000 in 1902 to £202,000 in 1903.* The preferential duty began at 25 %, it was then increased to 33 %, and under the 1904 statement of the Canadian Finance Minister, it has increased to 50 % in the new tariff. There are not many potteries in Canada, and it is a question between us and the United States, and was a growth of the Imperial spirit which led them to wish to give an advantage to us where they could. They have to import nearly all earthenware. This preference is a very great advantage to us. We are all looking forward to a very much increased trade with Canada.

WITNESS No. 279.

MR. JOHN S. GODDARD

(Ashworth Bros., Hanley; Manufacturers of General Earthenware and Sanitary Ware).

We are manufacturers of general earthenware and sanitary ware.

State of Trade

Business in the United Kingdom is about the same as regards the gross returns, but we have to be constantly looking out for some new branch in order to keep our returns up. Novelties are not introduced in sanitary ware so frequently as in general ware.

(*See also Tables in Section V.)

We export our goods to the Continent of Europe and to America, and in some small degree to the Colonies. The exports from this country clearly show that the Americans are making more pottery every year, and more nearly supplying their own requirements. In fact, in some branches of the trade, English manufacturers have almost lost the market. The total net profits in our trade have decreased during recent years. That applies to all branches, and more particularly to the sanitary ware branch.

Our foreign competitors copy our designs to some extent and we are forced into new branches, the foreigners taking our old ones. Competition has been so keen, and things have been cut so much that we have had in some instances almost to create a new line. In many branches there is competition between foreign goods sold in this country and ours. In most cases those goods are sold at prices at which it would be difficult for us to produce at. This competition is chiefly from Germany, France, Austria, Holland and Belgium, because they can produce more cheaply owing to lower wages and longer hours. A quantity of goods still goes into the Continental market; but there are some branches which have been entirely lost. For instance, my own firm years ago used to send a large quantity of earthenware teaware into France. Now we do not send, and have not done for some 10 or more years past.

My own estimate of the value of home production, is 8 millions. It has been estimated from 5 up to 16 millions. My method of getting at it has been to estimate the number of factories in the trade of a given production and lump them all together. The figures of the imports of china and earthenware into this country for the quinquennial years 1883, 1888, 1893, 1898 and 1903, show the great increase which has taken place during the last 20 years, especially from Germany and to a great extent France.

The foreigners' great advantage is that they have a protected market, and through that being able to erect large factories, with everything as up-to-date as possibly can be got, and, to all intents and purposes, an absolute security for their trade. Railway rates also in foreign countries are more favourable, and in most of the Continental countries they have a much better system of waterways, which is a very important point. All the foreigners' goods are delivered free of carriage and packing, and they give you packing cases in as well; they are not returned. The foreigner is not responsible for breakages, nor are we, in Staffordshire, as a rule, responsible, except where it can be proved that the breakages arise from faulty packing. The proportion of wages to the total cost of production I put at from 40% to 50%. It is a very difficult matter in the pottery trade to estimate the exact proportion of the different items of cost. It is so intricate. Labour runs from 40 to 50%; but on the Continent the labour proportion would be very much less—there is no question about that—and even less in Japan. From the information we got a good many years ago, the wages in Germany were estimated at about 60% of the wages in Staffordshire; but that would not altogether account for the difference between their prices and ours. We generally reckon the retailer puts on 50%, and out of that he has to pay carriage and packages.

Some raw material used by the foreigner actually comes from this country, and possibly in some cases they get it cheaper than the Staffordshire manufacturers on account of the charges for freight, for it is practically wholly sea-borne. Our clays all come from Devonshire, Cornwall and Dorsetshire. America and in some measure some of the Continental countries are dependent more or less on clay supplies from this country for making their earthenware. That is a matter which ought to be kept in view. It is a question analogous to the export of coal and a very important question, though the owners of clay fields would probably make a protest against being restricted in the amount of their exports. The United States for one class of clay—ball clay—which is absolutely essential for the manufacture of earthenware, is entirely dependent on supplies from this country. They have deposits of china clays in their own country, but not ball clays. They have clays suitable for making china, but not for making earthenware; though, as a matter of fact, not much china is made in America; and the china which is made on the Continent is to a large extent of an altogether different character from the English china; it is not bone china.

The foreigner can make and is making earthenware. It is a point that has been disputed over and over again. The free-trade manufacturers admit that the foreigners compete in china, but they say that no foreign-made earthenware is coming into this country at present. Here are samples, all good, sound stuff; not the rubbish it used to be years ago. At present they have not attacked the ordinary lines very seriously, but they have begun to do it, and it is only a matter of time when we shall have the earthenware market flooded in the same way as the china market is at present. Their earthenware dinner plates are as good, in some respects, as any earthenware we know of which is being produced in Staffordshire at the present moment. They get a good price for them, they are not dumped goods. As a matter of fact this ware is being bought and sold at higher prices than English earthenware. The samples of dinner plates in question have been bought at 4s. 3d. a dozen.

The following may serve as a brief review of foreign competition in general:—

Dinner Ware (dinner services).—The foreign-made ware, which is chiefly china, and which competes with the better classes of English earthenware, is imported principally from France and Germany. It has obtained a great hold upon the market and is to be found in nearly all the better class retail shops in London and the provinces. This competition has established itself during the last 15 years. The amount of competition I estimate at from 25% to 50%—and it is more pronounced in London than in the provinces. At present there has been but little foreign "earthen" dinner ware introduced, though there is some, and no doubt this will increase. In the cheaper lines, such as printed dinner ware, at present there is very little competition. No English-made china ware can compete in price with the foreign. The English costs on a very reasonable estimate at least twice as much. It is a different class of ware—a lighter article as a rule.

Toilet Ware (*i.e.* bedroom toilet services).—There has been for some years past foreign china toilet ware imported, though the quantity has not been large, and the prices compare favourably, and in many cases are less, than similar English earthenware. More recently foreign earthenware sets have made their appearance,

Imports

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Foreign Advantages

Carriage and Packing.

Elements of Cost

Raw Material

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Foreign Earthenware

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Foreign Competition in General

169 **Foreign Competition
in General**
—continued.

which are good in manufacture and design, and which are being sold at somewhat less prices than English ware of similar quality and decoration. At present there is only a small quantity of this class coming, but it will undoubtedly rapidly increase. Twenty years ago very large quantities of toilet ware were sent by the Staffordshire makers to the United States, but now there is comparatively little sent, as this is a line which the American makers have paid special attention to, and they seem to be supplying the bulk of the requirements in America.

Sanitary Ware (lavatory basins, water-closets, and similar sanitary appliances).—At present the foreigner has not made much progress in this country, but English makers are meeting with more competition from foreign makers in the Continental markets.

Earthenware Jugs.—Latterly, say within the last 3 years, there have been large quantities of earthenware jugs, with coloured decorations, imported from abroad, which have displaced so many English-made goods. Both manufacture and decoration are good.

Flower Pots and the like.—In this class, the better class particularly, the foreigner has captured a very large percentage of the trade. The shapes and decorations are exceedingly good and the prices are much lower than the English. In some styles of decoration the foreign-made goods excel.

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Trinket Sets and Candlesticks.—These are sold at one-half the price they can be produced and sold in English earthenware.

Fancy Goods.—It is perhaps in this line that the foreigner has done the most serious injury to the English maker. The foreigner copies some of the best-known English models and sells them at about $\frac{1}{3}$ of the English prices. It is not therefore only the less artistic and commoner classes of fancy goods, such as those usually sold at seaside resorts, which are imported from abroad, but the better classes also. I estimate that the foreigner has captured fully 75 % of the fancy goods trade of this country. The prices of most of these goods are astounding, and a long way below prices at which English makers can possibly sell. These goods are coming from a large number of countries, Germany, France, Austria, Holland and elsewhere.

Dumping

I am not prepared to say whether these articles are dumped or not, because it is so very difficult to get absolute evidence of what is a dumped article. In many cases the presumption is that it must be dumped, but one cannot produce absolute proof. Still we believe that some of the foreign articles sold here could not be produced, even in the country of origin, at the price they are sold at, knowing the rate of wages and the cost of material. We had an exhibition a short time ago in Stoke of dumped china and earthenware. We looked upon them all, at least most of them, as good cases of dumped goods. We cannot conceive that they can be anything else. By "dumped" we mean not only that they are very much cheaper than ours, but that we cannot conceive that they could be produced in the country of origin at the price at which they are sold. The workers had a chance of seeing them, for they were publicly exhibited for about a fortnight. We are proposing to have another exhibition shortly. The prices at which the goods were sold were attached to them. The middleman is getting a very much bigger profit out of this ware than he is out of the English make. The articles are multifarious. There is an enormous quantity and variety, and the question is whether the competition is a direct one, or whether it is simply a case of substituting an inferior article for a more complicated one. When I say the foreigners sell their goods here at $\frac{1}{3}$ our prices, the goods are not exactly the same in a great many cases; but the English manufacturer could not possibly produce any particular article excepting at a very much higher price, even if he had a large sale for it when made.

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**Japanese
Competition**

For many years past there have been imported into this country quantities of Japanese ware, mostly isolated pieces of quaint and decorative designs and shapes; now there is every evidence of the fact that the Japanese are beginning to organise their trade, and they are now making and sending in some degree, standard lines of goods. The competition from this quarter, in view of the exceedingly low rate of wages paid in Japan, and the innate artistic character of the nation, is perhaps the most to be feared of any foreign competition in the future. I believe that in Japan the rate of wages is about 4d. a day.

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Duties

The rates of duty would have to be very considerable on some of the articles, and there would have to be a number of different classes of duty, probably ranging from 10 % upwards, as 10 % all round would certainly not meet every case, though it would be of very substantial assistance. In some particular instances it would take as much as 50% duty to really put the trade upon a proper footing. It might have a tendency to slightly increase the prices, but prices would not be increased to the full extent of the duty by any means, as the middleman would have to bear a part. With a 10% duty the internal competition would be sufficient to keep down any rise in price. A 10% duty would be some encouragement to manufacturers to put down more modern appliances and put up more works, if combined with preferential tariffs in the Colonies.

We cannot run our factories at their full capacity, and that very largely increases the cost of our production. The duties would probably enable us to do this and therefore reduce the cost; it would all tend towards that end. Duties are not wholly paid by the countries imposing them. This is proved by the fact that British manufacturers have had to reduce their prices in order to maintain their position in the United States and elsewhere, when the duty has been increased. And that would apply conversely to our case. That has been, I think I am right in saying, the case in every instance where the duty has been raised.

WITNESS No. 280.**MR. T. B. JOHNSTON**

(Messrs. Pountney & Co., Ltd., Bristol; Manufacturers of General Earthenware).

I am chairman of Messrs. Pountney, and also of the Bovey Tracey Pottery Co., Ltd., but for the purpose of this enquiry I represent only Messrs. Pountney.

In our factories trade has been very steady during recent years, but it is falling now. The trade as a whole has undoubtedly fallen back. At our other works in Bristol we have gone in for making light goods, the better class of earthenware, and the result is the opening up of a new market, and we have kept very well employed, but it remains to be seen whether it pays to do that or not. Both of our factories originally made the ordinary common earthenware for general domestic use. This semi-porcelain is a very thin grade, more like china. It really approaches china in everything except transparency and is very popular now, and when nicely got up, much better than anything the foreigner can do, and it will stand wear without chipping. We make the same class of goods they make in the Potteries, but these are the staple goods, and they are a slightly better quality of the staple goods. **State of Trade**

Profits in relation to turnover have been steadily on the decline until 1899 when there was a rise generally all the way round. The rise was in materials, and we got better prices, but now they are falling again. The returns show clearly that every year more foreign goods come into the English market, but the fall of profits is due to the raising of the American tariff in 1897 more than anything else. There were then a large number of firms manufacturing exclusively for the American market, and when the tariff was put up 20 % the output fell off over 30 %, with the result that those firms came into the English market, and so increased the competition in our own market very considerably. In our district, and in our works, we have given a better quality and sold at a less price, and in addition to that we have paid higher wages to a certain extent. This has met the difficulty up to a certain point. If it goes on we must have a market to increase the volume of our trade. That is the trouble with us in England. We want larger outputs and so get our charges down. The competition during the last 10 years has been very much greater. **Profits**

We cannot at the present moment trade with America, because of the tariff of 60 %. There is only an opening there for the highest grades of semi-porcelain goods. My partner has been some time in America studying the chances of trade there, and he reports that it is utterly impossible except in that branch. The Americans have not yet reached that stage, but have caught us up on the others. Transfers and painting and that sort of work are done well in America. Though our trade has fallen off in America very considerably, it is rather a curious thing that some potters and some other English manufacturers are doing remarkably well and are increasing their turnover. Some have doubled or trebled their businesses, and though the American trade has fallen off over 30 %, they are getting it at the expense of other British manufacturers. This does not mean, however, that more labour is being employed, but on the contrary about 30 % less. **United States Trade**

There is no doubt that Staffordshire is the place to manufacture, because of the labour. The skilled labour has been there for generations, and the Staffordshire pottery, beyond doubt, is the best in the world, and I see the difference in my workmen when I go to Staffordshire. The way they handle the clay in Staffordshire is absolutely different. Being in Bristol, and having been established there for a long time, we decided to remain. Ours is a very old firm. We date back to 1750, and the Bovey Tracey pottery to 1800, about the time they were making the fine Bristol china. We are the descendants of the old firm. In those days they did not get the painters from Dresden and the Continent. Fyfield was a great painter at that time, and he came from Plymouth. We cannot get our labour at Bovey Tracey. We cannot transplant the workpeople, for they will not go. I have tried to send Bristol men down there, but they say they have no music halls and no theatres. I thought they would like it, for it is a beautiful place on the borders of Dartmoor, but they will not go. **Labour**

Our hands have been fairly well employed, but the last year we have been working only 4 days a week at one of our works. The rate of wages has increased in actual money amounts. We are paying now for a certain class of work 5s. a day where we paid 4s. a day 5 or 6 years ago. **176**

Personally I am strongly in favour of technical and commercial training, and higher education. The best technical education is what a man gets in the workshop, but in addition to that, to those who attend the technical classes in the evening, the better class of men, undoubtedly it has been and is of great benefit. Their general intelligence is improved and they learn the theory alongside the practical work. My time has been mainly occupied in driving the theory into my men, and getting them to understand it and combine it with their practice. **Technical Education**

A thoroughly good German chemist in general pottery and colouring as well as in bodies and glazing called on me this morning, and he is anxious to come into the works. We have got the empirical knowledge but we want the chemical knowledge. For the last 10 years I have been urging that the best reserve fund we can make would be to have a chemist in our place constantly experimenting on research work, but my partner does not quite see it in the same light when we have argued the thing out. The fact is, he says, we cannot afford it. Under the conditions in which we are in to-day I give way to him. If we were making better profits though he might not agree with me he would say, we can afford it and will try it. That is where we **Expert Chemists**

manufacturers are. The time is taken up with watching our costs, and seeing they do not go up too much. If we had confidence in the trade the foreigner would not be much ahead of us. We have now good English hands in our works in the higher branches, all taught in the works from lads. All my foremen I have brought up myself from apprentices.

We are bound to have scientific chemists if we are to hold our trade. It is a difficult question that I am very much interested in, and I have been ever since I went into business. In fact I got the Professor at the University college at Bristol to give lectures on the chemistry of potting to my workpeople once a week all through the winter for 3 years; but you want chemists who have been trained in your works, and have the practical knowledge. It is astonishing how over and over again I have had these scientific men down, and they say this and that is quite easy, and we can put it right. Then they have found the difficulty and have had to admit that things do not work out as they expected. It needs practical training, and the chemist of a pottery must be a man who has been trained right up in that one thing. It is a big field and a big subject, and the way to get these skilled practical chemists is to put on a tariff and then in the same way as the foreigner years ago took our skilled empirical workers, so we should be able to take their trained chemists. That is better than a Charlottenburg University which would take 30 years to establish. You will get it directly you get the tariff. This German chemist is a clever man, but he will have a difficulty to get into an English factory because we cannot afford the money. If there was a trade ahead we should take him.

The volume of our trade does not at present admit of our having chemists solely employed. In pottery a works manager has got all his time cut out to learn his business, and with a skilled chemist in pottery also—unless he were also a practical man—I should be upside down before I knew where I was. In my business there are a great many instances of people so employed. The pottery trade is a difficult trade and needs practical men. If I came across a practical man, also a chemist, I should certainly employ him as manager. The difficulty is to get the practical man and the chemist in one.

Freights

I have no reliable information as to preferential railway rates in foreign countries, but it is well known throughout the trade that the Germans have an advantage in their freights. They deliver all their goods carriage paid, and our goods are all ex factory. That to a large extent prevents our knowing what it actually costs them to produce. One cannot tell exactly what the carriage is and we cannot compare our transport rates by land and water. There was a great deal of trouble as to freights when they started the line of steamers from Bristol, and the South African ring simply prevented us from sending goods by those steamers. We should have done it, but our merchants and buyers would not as they were afraid of losing their rebates. The result was we could take no advantage of that line. The ring is very strong. Sir Alfred Jones' line to the West Indies is a help to us. We went to that market, but prices are cut so low, that it is not worth while going in. My partner went over to see what could be done; we did a little, but it was not worth much. They get their goods from Germany, and some come from England, but it is a very low class of goods on which the margin of profit is cut very fine. I do not know what the freight from Germany is; but there is no doubt about the competition by Germany. We have not sent by New York to get cheap freights, but it has been done considerably and we talked of doing it at one time.

Proportions of Cost

As to the relative proportion of the different elements of cost. Wages vary from time to time, but the average of the trade would be from 42 to 45 %, though as a matter of fact if I increase my turnover by £100, £70 or £75 goes to labour directly or indirectly. £42 goes to the labour in my works, but the coal is another large item of which 70 to 80 % is labour, and then there are the other materials. In fact I made a calculation some time ago, and it is something like 70 to 75 % which would go as wages to the workers directly or indirectly. If the manufacturer increases his trade he would get £5 net profit out of every £100, and the working classes would get £70. It is not the manufacturers who will make the great profits as everybody seems to think.

Costing

The system of checking and accounting is very likely better in foreign countries than here. We are a very old nation and we have traditions and old traditions, and old scales and old rates in our trade which were applicable years ago, but which are not quite so applicable now when machinery is introduced. The foreigner has gone into this more closely than we have. Probably the decimal system has helped it very much, and made it more easy to make complicated analyses of costs.

Amalgamations

As to amalgamations it is a very difficult thing to arrange a combination to keep prices up, but it seems to be easier to do it where there is a protected market.

Foreign Methods

Foreign countries have no advantage in respect of processes of manufacture, so far as I know. America has none whatever. In Germany the labour may be cheaper. A friend of mine who has been manager of a German factory for some years, told me that though the labour was cheaper it was not as good, and that in the long run it was no cheaper. The great thing they have, and it is borne out by what a young German chemist told me, is better organisation, larger works and more machinery employed for moving the goods all the way through. In England there is nothing of that kind, it is all done by hand. In Germany there is greater division of labour in the works, and larger works. Machinery can be put in on a larger scale. The foreigner, with the help of his tariff, makes on a larger scale to start with. Then with larger works he can make use of this machinery which we cannot, and every day it is becoming more clear that in the future we shall have more machines. There are machines for making one class of goods like ewers. If I put in one of those I should have my whole place filled up with ewers. The foreigners can put that machine down and reduce the cost from 2s. 6d. to 1s. 6d. a dozen thereby.

There is another process that might be called firing by machinery:—In the biscuit furnaces at Huntley and Palmers' factory at Reading, the biscuits go in at one end, gradually pass through the fire, and come out baked at the other—a continuous process. Our ovens are large erections filled with saggars, and it takes a long time to fill these kilns and to empty them. In these foreign rotary kilns the ware would come in gradually

at one end and be taken out at the other, and thus reduce the cost of fuel 80 %. This has been done for the last 5 or 6 years on the Continent, and it is gradually coming. It is not absolutely successful yet, but it will be, and when it is the foreigner can take advantage of the machine, reduce his labour bill, and save time in manufacture, and instead of taking 6 weeks to get ware through from the clay he will do it in about 4 days. Much of the decoration of pottery is done by lithographic transfers. Years ago I put a machine down for the purpose of making them, but I cannot keep that machine going because it turns out such an enormous quantity; if I could turn over 4 times the amount then I might be able to reduce the cost of dinner sets 2s. or 3s. a set. This machine is costing me 8d. a sheet at the present time, whereas if the machine were fully employed the cost would not be much more than 3d.

Foreign tariffs restrict British trade and help competition with other countries without doubt. Although we have every advantage in England to get the clay, and the coal and the best skilled labour, yet by means of the tariffs, and the introduction of machinery, the foreigner will in the long run be able to beat us. Take America for instance:—I went over there in 1897, just after the tariff was raised, and I am firmly convinced that they have no right to make a single ounce of pottery on strictly free trade principles—they can not really compete with us in any way without the tariffs—and yet they are getting our skilled labour over there. In 10 years' time America with its tariff advantages, and the use of these transfer machines and these new kilns, and also the fact that they can get a good price in their own market, will be able to beat us hollow though we ought to be doing the trade. We are obliged to be continually producing new shapes and new decorations, and cannot put into stock certain classes of ware which will be selling the year after next. While foreign tariffs increased and our trade declines, capital will not go into the industry.

Effect of Foreign Tariffs

When I was a boy we were losing money in our business, and I had more drilling perhaps than other manufacturers in the advantage of concentration. We had two works then, and I clearly saw that if we could close one we should save expenses, but I never realised what it meant. We did close one. What was the difference? We saved more than we thought we were going to do. Not only that, but we turned a loss into a profit. Some years afterwards there was another works in the district the owner of which had died, and we leased it, but we had not worked it long before I found that it was too small to make it pay on the turnover. So we gave it up and transferred the business to our other works. I reckoned we should save a few hundreds a year upon that, but we saved a great deal more. We put it into our other works and it made all the difference. If we had our works at Bovey Tracey at Bristol, and if we put these two works together, we should save a considerable amount, not only in labour, but in stocks and other dead charges. We should not want the same amount of stock and not so much capital. We might almost close the Bovey Tracey works because the other would be more effectual, and if we had the output the thing would be feasible. One man looks after a 400 h.p. engine, but it takes one man also to look after a 50 h.p., and then there are stock and other dead charges. It means so much more than the average man thinks it does, unless you have very careful cost sheets.

Concentration of Works

There always will be men above the average who do well when other men are starving, but the trade of any particular industry should be such that the average man, with average ability, and industry, should be able to make a living, and the Napoleons of the industry ought out of the natural expansion of the trade to do well; but when a trade remains stationary then these men are simply driving the others out, and are not employing more labour. Foreign tariffs tend to the efficiency of production in foreign countries by securing the home market. That is the whole thing. If it were not for that I should be a free importer to-day. I have been a very keen free trader in days gone by, but this is the one thing that has altered the whole question. The whole basis on which they have founded all their theories in days gone by has been upset. It is not cheap labour and cheap materials only that is the greatest factor of cheap production, but it is quantity of production coupled with the efficient use of labour-saving machinery, and without an assured market you cannot spend a large sum of money in doing that. If I thought I was simply going to sit still and get a higher price, and do no more trade, it would be wrong; but what I firmly believe is that in the whole of the Staffordshire district over 60 % of the factories ought to be scrapped, and modern works put up. There are young friends of mine who are keen, and would like to pull their old works down, but how can they get capital into their businesses when at present they can only show a bare 5 % profit? The capital does not come into it. The alterations are very costly.

Effect of Foreign Tariffs

The facilities enjoyed by our foreign competitors is the whole crux of the question. They have our market to dump in.

Dumping

With reference to the competition we are meeting with from Germany, some few months ago our London agents (who also import a large quantity of fancy goods from Germany) wrote to us and asked us to quote them for a plain white fluted teapot which they were buying from Germany, and which they would have preferred to buy from us if the price had been right. We went into the matter, and after cutting the price very fine, quoted them 9s. per dozen. They wrote back to say that this price was absolutely out of it, as they were only paying 2s. 9d. per dozen. Now we pay our men for making alone 2s. 9d. per dozen, and they cannot earn very good wages, even at that price, in fact we have a difficulty in getting them made for it. This figure seemed to me so absolutely preposterous that I wrote to our agents and said that I thought this could not be an article in regular sale, and that they must have bought a job lot which, for some special reason, had to be got rid of. Their reply was that this was no job line, but a regular selling line, of which they had bought yearly many scores of dozens.

Now I feel as confident as I can be about anything that this particular teapot could never have been produced under any conditions for the price at which it was being sold. I ought to say also that this was a china teapot, whilst the price we quoted was for an earthenware one. The Germans were thus actually selling delivered free in London at the same price as we were paying our men to make them. There is all the labour of firing and preparing of the clay and glazes in addition to be added, and of course also the cost of the materials. The only conclusion one can draw is that these goods are dumped.

185 Dumping in
South Africa

Here is an extract from one of our South African Agents' reports for March, 1904 :—" Our customer at Oudtshoorn has just compared the price of your last consignment of teas with the consignment recently delivered by a German firm. Yours, as you know, are not decorated in so expensive a manner as their white and gold. Yours work out thus : Landed, cost 3s. 5d. per dozen of 12, including inland carriage. German white and gold : Landed, cost, including inland freight, at 2s. 8d. per dozen of 12." That means that there is a difference of about 1s. 10d. The German is about 10d. a dozen of 12 pairs against our 1s. 7d. a dozen of 12 pairs. That is dumped. There is no question about that. That is to say the subsidies and assistance given in one way or another account for it. With regard to decoration of cups and saucers in which the Germans are said to surpass us, the cost of gold is pretty much the same the world over. They do not get it cheaper, but increased outputs and the subsidies they get in the freights, make this competition possible.

Duties

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If a tariff were put on here—just so much as they have increased their business by their dumping in our market—it would hit them hard, because it would send up the cost on the other side. If they are putting 20 % of their goods into our market to-day, and this is stopped by a tariff, their cost of production would go up and they would not be able to compete in the neutral markets with England. The foreigner will have to choose ; it depends what the tax is. It may pay him better up to a certain point to pay the tax rather than stop part of his works. The condition of fair competition would be such a tariff as would practically stop dumping, and dumping could be stopped. 25 % on the whole would be enough ; that is what I have found in my experience of dumping in our class of pottery work, but it would vary according to different stages of our turnover. Graduations of tariff according to the wares and the market based on the labour would be a fair thing. In common goods 10 % would perhaps be enough, because the freight would be heavier. There is no section of the business which would require more than 25 %. All depends on the amount of the tax, but it is very likely that the foreign manufacturer would pay part of it. He would look upon it as a matter of business. He would have to consider whether it would pay him best to close part of his works or pay the tax. At the start the foreigner would pay a very large portion of it undoubtedly, but the duty would encourage manufacturers to rebuild their works and modernise them, and the result in the long run would be that the cost would be less. I have never increased my business without reducing the cost and selling prices, and that is the only way you can do it. The consumers get a better article at a less price, and higher wages can be paid to the work-people. It seems perfectly clear that that is the result of increased efficiency of the works and the labour-saving appliances that can be brought into play. If there was a tariff the Colonial trade would expand very considerably. There is nothing to prevent it. They prefer our goods to the foreigners.

Preference

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The preference in New Zealand has been a very great help. In South Africa it is only 2½%, which is too small to be of any great assistance, and it has not been working long enough for one to have had much experience of its benefits. It is in New Zealand where our agents speak so strongly about it. It is 25 % there. Extended preferential arrangement with the Colonies would, without doubt, help our trade very considerably. We did a fair South African trade until last year, when it fell completely away. We are afraid to send goods over at present ; it has been over-stocked. We have never done much export trade until recent years, but there is no doubt whatever that the preferential tariff with New Zealand will help us very much. We have had letters from our agents there, pointing out that there is a good prospect for us in New Zealand, and in Canada there is no doubt about it the preference has been a very great thing for us, and we are now contemplating going into the Canadian market. If the preference were withdrawn the Canadian market would be practically closed to us.

WITNESS No. 281

MR. F. RAWDON SMITH

(Managing Director, Craven, Dunnill & Co., Ltd., Jackfield, Shropshire ; Manufacturers of Tiles
of all kinds).

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State of Trade

The principal branch of our business is decorative tiles. During the 5 years ending 1903 the trade in the United Kingdom has been steady, with foreign countries it has gone down, with the Colonies and British possessions it has gone up. But the general tendency, taking all together, has been to decrease the total net profits in our trade in our district in relation to turnover. As proved by our balance sheets the decrease is steady and continuous. The output has also decreased and all branches have become less remunerative. The volume slightly fluctuates. The output is larger, taking series of years, comparing 1890-1900 with 1880-1890, and this latter with 1870-1880.

Causes of Change

I attribute the change in the state of trade in our district to the decrease in home consumption lately' and to long continued depression in the Banda Oriental and Brazil, and in Australia, to the sudden collapse in South Africa, and to the high tariff in the United States of America. The decrease in the home consumption is mainly due to the general depression of trade.

Wages

There has been little or no alteration in either day work or piece work wages. Any alterations have been towards lessening the rate, but those mostly on the introduction of improved methods involving a greater capital expenditure.

From what I have observed in Germany the system of technical education there produces better foremen and "upper grade" workmen; the "common" workman does not avail himself of technical education. The greatest enemy to the production of intelligent workmen in England is that every workman fancies he knows all about it, and that no one can teach him more. A foreign workman is always on the *qui vive* to catch a new idea. That was my observation of several factories in Germany, in Holland and in the United States, which I visited myself.

Technical Education

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Foreign countries have no advantages in respect of processes of manufacture. I have been round several works and have never seen anything they have not copied from us. That applies to the United States as well, though formerly they had the natural gas fire, which has now ceased.

Foreign Advantages

In our trade there never was a good design that was not copied from an Englishman's as far as I have seen. The piracy that goes on is most irritating, and I am told there is no redress.

Piracy of Designs

The leading causes which produce combinations in this country are the hopes of a reduction in cost by buying raw material in a more wholesale fashion, by reducing clerical and managerial staff, and economising the expenses of travelling and distribution. A large company can buy their raw material cheaper than a small one, because they can buy it by the shipload and save freight.

Trusts

I divide the proportion of the different elements of cost as under:—

Elements of Cost

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	Raw Material.	Forer.	Wages and Warehouse.	Fuel.	Freight and Cartage.	Office.	Travellers, Agents, Branches, Pattern Book.	Rents, Rates, Taxes, Royalties.	Management	Repairs.	Unclassified, as Law, Patents, Auditors, Insurance, Bad Debts, &c.
1901	14.43	1.21	35.36	10.62	6.11	9.58	10.90	3.03	3.08	1.49	4.14
1902	13.63	1.99	38.13	9.63	6.59	8.67	10.94	2.85	2.90	1.66	2.95
1903	13.18	1.64	37.15	9.45	6.05	9.35	13.09	2.62	2.88	1.56	3.01

The above table accounts for the whole of my firm's expenditure during the years 1901-2-3.

All sorts of railway rates seem high relative to the work done by the railway companies. That applies to us because ours is particularly heavy traffic. Ours is "rolling freight" and we pack very closely in tubs so that it is very solid and handy. We suffer also, in common with other branches of our trade, from the excessively high rate from our works to the sea. We cannot get on any canal in our district, though our goods are just those which would benefit by increased canal accommodation and with lower rates thereon. All the information I have on railway and canal rates in this country is that the difference between the two is inappreciable. The canal rate on tiles in Germany is much lower than the railway rate. Inferentially from the price of certain tiles delivered in London our trade suffers from the preferential railway rates adopted in foreign countries. From information in our possession I should say that a fixed sum would carry a given weight of tiles the shortest distance in the United Kingdom and the longest in the United States by rail. In the case of Germany, Holland, Belgium and France the distance would be greater than in the United Kingdom. In Germany, Holland and Belgium much carriage of tiles is done at a very low rate by water. It is only because of water freight that we can sell in Switzerland.

Freight Rates

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The British policy of free imports permits the Dutch tile maker to keep his works running continuously and to dump his surplus into England where he has "no wall to climb." One firm, for example, have to import nearly everything from England, with the exception of fuel, and they are able to, and do, export into London a prodigious quantity—for I may use that word—of tiles. It was, and I understand still is, an enormous business and a serious competitor with ourselves in London. We have tried by every conceivable means, but are unable to make much headway against it. We cannot produce and get our goods into London at their price. There is only one explanation and that is that they are selling below their normal cost price, though not in one sense below cost, because their surplus production costs them nothing beyond the labour and the raw material. But it is below cost so far as we are concerned when they sell at 5s. 6d. per square yard, delivered in London.

Dumping

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As to the effect of foreign tariffs in restricting British trade, there was this condition of things in the United States. The average proportion of our goods sent there was 25%, and we had a very fine business. That has been almost entirely extinguished by the tariff, except for what may be called *articles de luxe* if you may talk of such a thing in the tile trade, fancy articles which they will have at any price; in those we still do a certain business. We make every sort of tile. Floor, wall, hearth, bath, mosaic and faience—everything in such like articles. What I have said as to the United States applies also to Germany and France. To Holland, which is a low tariff country, we are still able to largely export. Foreign tariffs tend to the efficiency of production in foreign countries by securing their home market to our foreign competitors. Till the Dingley Tariff there were few tile manufacturers in the United States of America. Now there are many and large ones. Their trade has been built up distinctly in consequence of their protective policy. The tile manufacturers in the United States could not get on at all till the tariff was raised above 25% *ad val.*

Effect of Foreign Tariffs

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Preference

The probable effect of extended preferential arrangements with the Colonies would be an increase in the quantity of tiles taken by them. It is possible to extend British trade at home and abroad by excluding the foreign and by favouring the English maker in our Colonial trade. In consequence of Colonial preference we have had increased enquiries and some increase of trade with Canada. It is a very small trade at present, and a very large number of enquiries end in nothing. Our trade has fluctuated a good deal with the building trade. Possibly the climate of Canada in winter has something to do with the small demand for tiles. They are cold and very slippery to walk upon when the feet are coated with snow. Tiles and building go together and our business is the first to suffer in a depression and the last to feel a revival. Tiling is the first thing struck out of a contract if economies have to be made.

Duties

The duty would not raise the English price owing to the competition between home makers and the fact that prices in the tile trade are almost crystallised. That is to say there is sufficient competition because of the large number of makers in this country. We have a Tile Makers' Association, but it is rather loose. We try to regulate the price of these tiles but we do not represent a majority of firms, although we have the majority of output, and we still have to compete with outside competition in this country. Our workpeople do not know sufficient about the competition in London; but as a rule they know enough about it to be entirely in favour of stopping anything that is taking their bread and butter from them.

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SECTION IV.—REPLIES TO FORMS OF INQUIRY.

(A) IMPORTS COMPETING WITH BRITISH PRODUCTS.

QUESTION 3 (FORM I.): *What are the principal articles that you manufacture for the home trade in respect of which you experience foreign competition?*

Imports Competing
with British
Products

GERMANY :—

Artistic Pottery.
Ash Trays.
Battery Cells.
Bowls—earthenware.
Bricks—fire, magnesite, red and silica.
Candlesticks—china and earthen-
ware.
Castor Bowls.
Cheese Stands.
Chemical Stoneware.
Cider Cups—china.
Coffee Pots—china.
Coffee Sets.
Cream Jugs—china.
Cruets.
Cups and Saucers—china and
earthenware.
Dessert Sets—china.
Dinner Services—china.
Divided Cover Dishes—earthen-
ware.

Door Furniture.
Egg Baskets—earthenware.
Egg Cups—china, earthenware and
pot clay.
Egg Frames.
Electric Light and Bell Fittings.
Electrical Porcelain.
Fire Clay.
Figures—earthenware.
Funnels—china.
Fancy Goods.
Hospital Earthenware.
Ink wells.
Insulators.
Jugs.
Jugs—china and earthenware.
Knobs.
Match Boxes.
Moustache Cups and Saucers.
Mugs—china.

Ornaments.
Pic Cups—china.
Plaques.
Plates—white china and white and
gold china.
Present and View Ware.
Retorts.
Sanitary Earthenware.
Sardine Dishes—earthenware.
Shaving Mugs.
Soap Dishes—china.
Teapots—china and earthenware.
Tea Services—china, decorated
china and white china.
Tiles—plain glazed hall.
Toast Racks.
Toilet Ware.
Trays—china and earthenware.
Trinket Sets.
Vases—earthenware.

Germany

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FRANCE :—

Afternoon Sets.
Art Pottery.
Ash Trays.
Battery Cells.
Breakfast Sets.
Bricks—clamp (stocks and plate),
fire and silica.
Candlesticks—china (hotel).
Cruets.
Dessert Ware.

Dinner Ware.
Domestic Earthenware.
Electric Light and Bell Fittings.
Egg Cups.
Fancy goods—medium quality and
moderate quality.
Glass.
Insulators.
Marble and Slate Work.

Match Boxes.
Moustache Cups and Saucers.
Ornaments—red floor.
Present Ware.
Sanitary earthenware.
Tea Sets.
Tiles—glazed.
Trinket Sets.
Vases.

France

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AUSTRIA :—

Coffee Pots—china.
Bricks—magnesite.
Egg Cups—china.
Fancy Goods—better-class make.
Jugs—china.

Mugs—china.
Plates—white china and white and
gold china.
Teapots—china.
Tea Sets—better-class make.

Tea Sets—decorated china and
fancy.
Tea Ware—white china and white
and gold china.
Trays—china

Austria

BELGIUM :—

Bricks—clamp (stocks and plate),
magnesite, paving and silica.
Cement.
Fire Clay.

Glass.
Marble and Slate Work.
Sanitary Pipes.

Silica Fire Blocks.
Tiles—coloured enamelled and wall,
white.

Belgium

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HOLLAND :—

Bricks—fire, paving and red facing.

Tiles—decorated and Dutch
enamelled.

Tiles—glazed and white wall.

Holland

U.S.A. :—

Baths—fireclay.

Closet Pans.

Electrical Pottery.

U.S.A.

SPAIN :—

Tiles.

Spain

ITALY :—

Light Italian ware for interior walls.

Italy

GREECE :—

Bricks—magnesite.

Greece

IMPORTS OF WHICH THE COUNTRIES OF ORIGIN ARE UNSPECIFIED:—

Acid Jars.	Earthenware.	Ridges.
Baths.	Electrical Pottery.	Sanitary Fittings—fireclay.
Bread Trays.	Fancy Earthenware.	Sardine Boxes.
Bricks—fire, fire (for resisting chemical action in certain parts of gas and glass furnaces), red, and bricks for lining rotary cement kilns.	Fire Bricks—Dinas silica.	Shaving Mugs.
Candlesticks.	Fire Clay Gas Retorts, fire clay for Glass Houses, and fire clay Ware glazed.	Slates.
Cement.	Flower Pots.	Socket Pipes.
Cheap China.	Fruit Dishes.	Spirit Jars.
Cheese Stands.	Gas Retorts.	Stone Bottles.
Chimney Pots.	Jam Jars.	Sundials.
Coat of Arms Ware (“Heraldic Ware”).	Jugs.	Tea Sets.
Crucibles.	Marmalade Dishes.	Tiles—encaustic glazed, glazed, floor and wall.
Cups and Saucers—Irish, white and gold, and tea, white and gold.	Mouldings.	Toast Racks.
Dessert Sets.	Mugs.	Toilet Services.
	Paving Goods.	Toilet Table Sets.
	Polishing Powder and Paste.	Trays—fancy and triple.
	Prepared Floorings.	Trinket Sets.
		Vases.

(B) SOURCES OF SUPPLY.

QUESTIONS 3 AND 4 (FORM VIII.):—Give particulars of the principal supplies of the materials, raw and partly manufactured, used in your industry in 1903, and state from what countries they are derived. State if any of the above-mentioned materials, now imported from foreign countries, were formerly obtained in the United Kingdom, and, if so, what has caused the change.

Sources of Supply.

MANUFACTURERS OF GENERAL TEA AND BREAKFAST CHINA AND FANCY ARTICLES.

Coal, lead, china stone, china clay, fire clay, colours, plaster, flint, packing materials from Cornwall and other parts of England; borax, straw and paper, partly English and foreign; liquid gold, France and Germany; calcined bone, South America. Materials have always been obtained as stated except best gold, which was obtained in this country, but has now been displaced by liquid gold from France and Germany. Bone was formerly obtained here, but for some years it has been obtained from South America. The change we understand was owing to the objectionable fumes in producing it.

MANUFACTURERS OF CHINA WARE.

Our principal raw materials are liquid gold, lead and litho sheets from Germany; colours and flint from Germany and France; bone from Rio Grande; oil and turpentine from America; straw from Holland. Straw and lead were formerly obtained in the United Kingdom, but now from abroad owing to their being cheaper. Liquid gold is not made in England.

MANUFACTURERS OF GENERAL EARTHENWARE, YELLOW WARE AND ROCKINGHAM TEAPOTS.

Our principal raw materials are boulder flints from the coast of France; china clay and stone from Cornwall; ball clay from Devonshire; boracic acid from America; Spanish lead manufactured by Derbyshire lead works. Lead used to be mined in Derbyshire and other countries, but Spanish lead is cheaper. Boulder flints used to be picked on our own coasts, but English labour is too dear and on some coasts picking is not allowed.

MANUFACTURERS OF FLOOR TILES, &c.

Our principal raw materials are red clays, fire clays, china clays, “Cornish” stone, manganese (crude binoxide), ironstone, white lead, litharge and copper oxide from England; flint from France (as ballast); borax from California, U.S.A.; felspar from Norway; and cobalt oxide from Saxony. We are not aware of any change from England to foreign countries, unless it be in the case of flint; the English variety is obtained in the lump from chalkpits and thus has more or less of this compound of lime upon it. As it is desirable to obtain flint as free from impurities as possible, and being found that the seashore-worn boulder flints from Fecamp and elsewhere on the north coast of France, which came over in ships as ballast, fulfilled the potters’ requirements, these have been used.

COMPOSITION BRICK MAKERS AND CEMENT BLOCK MAKERS.

Clay and sand from Scotland; cement from England and Germany. Cement was formerly all bought in United Kingdom; now partly got in Germany at 3s. per ton less.

MANUFACTURERS OF FIRE BRICKS.

Fire clay for glass house pots has been imported from foreign countries owing to its greater suitability; fire bricks and retorts for gas works and for coke ovens have been imported from foreign countries owing to the special means taken by the foreigners to adapt their goods to special requirement

(c) FOREIGN COMPETITION AT HOME.

Foreign Competition
at Home

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QUESTIONS 4, 5 AND 6 (FORM I.): *Are any articles similar to those manufactured by you imported into this country below your cost price? If so, please state particulars as far as you can. Have you any information leading you to conclude that such imported articles are placed upon the British market at or below the normal cost of production in the country of origin? Is your trade subject to adverse competition from foreign countries in consequence of any difference in the rates of wages, in the hours of labour, or in other respects?*

QUESTION 14 (FORM II.): *Is it within your experience that foreign traders are injuring your trade by disposing of their goods in any of your markets at a less price than they obtain for similar goods in their home markets?*

There are many general statements to the effect that wages are lower and the hours of labour longer in foreign competing countries. It is not thought necessary to repeat these general statements except where detailed information is given.

CHARLES ALLERTON & SONS, PARK WORKS, LONGTON, STAFFS.; Manufacturers of General China, Earthenware and Fancy Goods.

Porcelain, China-
ware, &c.

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From Austria and Germany below our cost price: White china teas and plates; white china teas and plates with gold lines (known in the trade as white and gold); decorated china tea sets, china jugs, mugs, egg-cups, tea and coffee pots, trays and other sundries. These are imported below the normal cost of production in the country of origin. In foreign competing countries wages are lower, hours of labour are longer. Foreign governments appear to help their industries as far as possible. We compete against adverse freight and railway rates.

J. AYNLEY & SONS, LONGTON, STAFFS.; China Manufacturers.

Teapots, toast-racks, candlesticks, egg-cups and frames are imported from Germany below our cost price. These articles could not be delivered in Longton (as they are) at a profit. I could not have them made at the price they are sold at. They are decorated, painted and gilt, and delivered here. I have a toast-rack and candlestick, both painted and gilt, delivered in Longton at 3½d. each. I pay 5d. each for making a similar article. We are copied right and left with all their technical education.

BARKER BROS., LTD., MUIR WORKS, LONGTON, STAFFS.; Manufacturers of General China and Earthenware.

We find more competition in china goods than in earthenware. The articles imported into this country below our cost price are teapots, egg-cups, mugs, jugs, cups and saucers, plates, and seaside present ware from Germany; tea sets and better-class fancy goods from Austria; and tea sets and trinket sets from France. A customer of ours sells retail for 4½d. a German china teapot which we have to pay our workmen 3d. to make; then added to this there is the cost of modelling, moulds, clay, firing, turn and glaze, and loss by breakage at various stages of production. To make a reasonable profit on this article we should want to sell at 1s. 6d. to 1s. 9d. In foreign countries wages are 25 to 30% lower, hours of labour are much longer, and then there is the difference in the railway rates and the cost of materials, their body being made of a cheaper class than we can, or care, to use.

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BISHOP & STONIER, HANLEY, STAFFS.; Manufacturers of Dinner Ware, Toilet Ware, Tea Ware, Jugs, Kitchen Ware, Flower Pots, Dessert Ware, &c.

Foreign competition touches such articles as trinket sets, shaving mugs, candlesticks, toast-racks, &c., but it can scarcely be called serious in our case. Possibly if French china dinner ware were prevented from coming in, or a heavy duty put on, we might have more demand for earthenware dinner ware. So far as our trade in the home market is concerned, any slight adverse competition we may experience is largely in consequence of the rate of wages, hours of labour, and facilities for inland transport possessed by foreign countries. As regards trade in foreign countries, the adverse competition is largely owing to the tariff.

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BLAIR & CO., BEACONSFIELD POTTERY, LONGTON, STAFFS.; China Manufacturers.

We experience foreign competition in nearly all the china ware we make, as our new patterns and shapes are immediately copied abroad and supplied to our own customers in Great Britain at very much lower prices. We have no information leading us to conclude that such imported articles are placed upon the British market at or below the normal cost of production in the country of origin, but as we supply some china to France and Germany and other Continental countries, which would satisfactorily compete against them in their respective countries except for their tariffs, it appears reasonable to suppose their goods are sold below cost in our country. Wages in France and Germany are at least ½ lower than in England, also the hours of labour are considerably more per week than here, and children are allowed to commence work much younger than in England. Freights and railway rates are considerably in favour of the foreigner.

BLYTH PORCELAIN CO., LTD., BLYTH WORKS, HIGH STREET, LONGTON; Manufacturers of General China.

Competition exists against goods we make, any novelties produced here being promptly copied abroad and imported here, particularly from Germany and Austria. Our class of china is sent into this country at a considerably lower rate than we can produce same.

E. BRAIN & Co., FOLEY CHINA WORKS, FENTON, STAFFS. ; General China Manufacturers.

Competition keenly exists against all goods we make, as any novelties brought out here are promptly copied abroad and exported here, particularly by Germany and Austria. Cups and saucers, egg-cups, mugs, jugs, tea and coffee pots, trays, plates, fancy goods and desert ware from Germany ; tea sets and fancy goods of superior class from Austria ; dessert ware, trinket sets, afternoon tea sets, fancy goods of moderate quality from France, are imported below our cost price, and at or below cost price in the country of origin. Wages in Germany, Austria, and France are from 25 to 30 % lower than here, the hours of labour are considerably longer. Most of the foreign china imported is made of cheaper materials than we can use for local reasons. High railway rates and freights are also against us.

SAMPSON BRIDGWOOD & SON, ANCHOR POTTERY, LONGTON, STAFFS. ; Manufacturers of General China and Earthenware.

Cups and saucers, plates, egg-cups, fancy goods from Germany ; tea sets and superior fancy goods from Austria ; trinket sets and afternoon tea sets from France, are imported below our cost price. Continental wages are lower and hours of labour are longer. The bulk of the foreign china imported here is manufactured of cheaper raw materials than the manufacturers of this district are able to procure.

HERBERT J. COLCLOUGH, GODDARD STREET, LONGTON, STAFFS. ; Manufacturer of General China, chiefly Tea and Breakfast Ware.

All goods we make are subjected to foreign competition ; strenuous efforts are made against special lines, and a large proportion of the goods is sold at prices it is impossible to produce them at. Wages in the chief Continental countries which compete with us are about 30 % lower than here. The hours of labour are considerably longer, and adverse railway rates and freights affect us disadvantageously. Imported foreign china is made of cheaper materials than we can use. English clays are imported abroad at lower prices than we can obtain them at.

W. E. COPELAND & SONS, STOKE-ON-TRENT ; Manufacturers of China, Earthenware, Parian, Stoneware, &c.

The more ordinary classes of earthenware and china are imported from Germany and France, but we cannot say below our cost price. But the market is inundated with cheap goods.

EDWARDS & BROWN, HIGH STREET, LONGTON ; Manufacturers of General China.

Germany, Austria and France import into this country below our cost price cups and saucers, egg-cups, mugs, trays, fancy plates, lettered goods for the seaside, tea sets, fancy articles of superior and medium quality. They considerably undersell us. Wages in Germany, France and Austria are about 40 % less, hours are longer, and the exported goods are subject to lower rates for freight and cheaper shipping facilities. Also the materials used are of a cheaper kind and not available in this locality.

HILL & Co., LONGTON, STAFFS. ; Manufacturers of General China and Fancy Goods.

Competition exists against all goods we make, as any novelties brought out by us are promptly copied abroad and exported here, particularly by Germany and Austria. Sets of 3 jugs are sold in Germany for 1s. 7d. ; the same jugs are sold here for 9d. Heavy gilt cream jugs from Germany are sold here for 2d. each, and we cannot produce them under 7d. each. With regard to cruet sets, &c., we pay more for making in clay state than the foreigner's price in this country. We pay more for wages in the production of most articles than the retail price of foreign goods here ; then we have to buy materials for making same, also to find fuel (which is a considerable item in making china), rent, rates and taxes. Additional expenses have also been caused recently by the special rules imposed by the Government. China made in Germany is of inferior materials and cheaper than ours. We cannot use the same materials as the foreigners, for local reasons. Freights and railway rates are also against us.

HOLLAND & Co., 22, EDGBASTON STREET, BIRMINGHAM ; Merchants.

We import china from Austria and Germany, and fancy goods from Bavaria and France. British-made goods are preferred, and it is only the foreign-made fancy goods that still linger on owing to the low price and artistic finish. Our importation of foreign goods is gradually decreasing.

E. HUGHES & Co., OPAL CHINA WORKS, FENTON, STAFFS. ; Manufacturers of China Ware.

All our goods are in direct competition with imported goods. Every new line we introduce is promptly copied by the Germans. Copies of our goods are sold all over this country at prices much below our cost of production. German tea services are sold here at 6s. 6d. per set, which we cannot produce for less than 10s. 6d. German fancy goods, such as mugs, candlesticks, moustache cups, &c., are sold at about half the price ours cost to produce. In the commoner lines of china the Germans undersell us by about 25 %. Trinket sets and some other lines from France and Germany have driven English-made goods almost entirely out of the home market. It is generally stated in our trade that German goods are sold in this country at much lower prices than in Germany. We have pieces of German china in our possession which have been sold in this country at prices it is not possible for them to have been produced at. In Germany the rate of wages to working potters is much lower than here. They also work longer hours ; but the main difference in cost of production is caused by their using very much cheaper material. The German china is made of "felspar," which is much lower in price than the "bone" we use ; we cannot produce the cheap felspar china here owing to purely local reasons, and this places us at a great disadvantage in price ; our productions, however, are much superior to theirs.

A. B. JONES & SONS, GRAFTON WORKS, LONGTON ; Manufacturers of General China and Fancy China Goods.

We experience competition in all classes of goods we make. We have to contend with Germany, Austria and France. They very largely follow in our footsteps in every new direction we take. Egg-cups, fancy goods such as cruets, egg frames, dessert sets, candlesticks, toast-racks, teapots, present ware for seaside places, especially, are imported into this country below our cost price from Germany ; and tea sets, afternoon tea sets, dessert ware, and trinket sets from France. Some of the lines are so much cheaper than we can produce for, that the use of cheaper materials and the difference in wages cannot account for it all. All smart productions are copied abroad, cheapened and imported here, and our trade for these goods spoilt by competition, which prevents us from doing any bulk of such new goods. Wages in Germany are at least $\frac{1}{2}$ to $\frac{1}{3}$ less. The working day is 2 to 5 hours longer. Foreign and English railways give many advantages to foreigners that we do not get, in the shape of cheaper rates, &c.

LONGTON PORCELAIN CO., VICTORIA WORKS, HIGH STREET, LONGTON ; Manufacturers of China Tea and Breakfast Ware.

China tea and breakfast ware of every description—especially egg-cups, mugs, toast-racks, plates, cups and saucers, teapots, &c., are imported into this country. Any novelty we bring out, any new shape or pattern is at once copied and sent here—even into our own town—to compete with our productions. We have bought foreign goods in this country at prices 20 % below the list price of such articles in the country of origin, notably afternoon tea sets and sets of jugs. In Germany and Austria wages are from 30 to 40 % less than they are here, while the hours of labour are longer. They can sell and deliver to us here, free carriage and packing, egg-cups at 4 $\frac{1}{2}$ d. doz., which is no more than we pay for making. They can get china clay and stone from Cornwall at cheaper rates than we can here.

THOMAS MORRIS, LTD., REGENT WORKS, LONGTON ; Manufacturers of General China and Fancy Goods.

Competition exists against all goods I manufacture ; nearly all new patterns and designs I bring out are immediately copied and sold within a few months in home markets by the Germans and Austrians. Germany and Austria lose 25 % on all the stock goods and cheap tea sets they sell in this country, otherwise they have nothing to pay for making same. Wages in Germany, Austria and France are 35 % lower than here. In Germany 14 hours per day are worked as against my work-people's 10 hours per day. Most of the china imported is made of cheaper materials than we can use, for local reasons. We are also subject to adverse freights and railway rates.

PARKYN & PETERS, 32, QUEEN VICTORIA STREET, LONDON, E.C. ; China Clay Producers.

The Staffs. potteries do not use nearly as much of our clay as formerly owing to the American duty of 50 % to 70 % on earthenware, china, &c., and German duty knocking them out—result, we suffer. Germans and Yankees are now sending their manufactured goods here.

PULHAM & SON, 71, NEWMAN STREET, OXFORD STREET, LONDON, W. ; Manufacturers of Pulhamite Stone.

There are plenty of vases, &c., imported into this country at lower prices than ours, but not necessarily made of similar materials. At any rate they come into competition with our own manufactures. Most of the objects imported into this country which compete with our manufactures would be made at lower rates of wages.

REDFERN & DRAKEFORD, BALMORAL WORKS, LONGTON ; Manufacturers of General China and Fancy Goods.

We experience very keen competition in goods imported from Austria and Germany, and new styles of our manufacture are at once copied by some Continental makers. Tea sets and fancy goods of better class make from Austria ; all useful china goods from Germany ; and dessert ware, afternoon tea sets and trinket sets from France, are imported below our cost price. We are of opinion that a vast quantity of tea sets and general useful china is placed on the British market at less than cost. Wages in Austria and Germany are at least 30 % lower than our own. The hours of labour are longer. The china imported into this country is made of cheaper materials than our own for various reasons.

RIDGWAYS, BEDFORD WORKS, STOKE-ON-TRENT ; China Manufacturers.

The following are imported from Germany :—China tea sets ; china jugs, 2s. 9d. doz. ; china soap dishes, 2s. 9d. doz. ; china funnels, 7s. 6d. gross ; $\frac{1}{2}$ pint china creams, 9s. gross ; all packages and carriage free. We pay 11d. a doz. or 11s. a gross for making earthenware creams, $\frac{1}{2}$ pint. It is extremely difficult to prove that such imported articles are placed upon the British market at or below the normal cost of production in the country of origin, owing to variation of qualities in German china and the different prices at which they are sold. Goods for export are subject to a rebate even off the low freights obtainable on the German rivers, canals and railways. These ordinary rates are in some instances below cost, as the following shows :—China clay and flints, Rotterdam to Wesel, 3 marks per 1,000 kilos ; earthenware, fine, Wesel to Rotterdam, 5-50 marks per 1,000 kilos ; earthenware, usual, Wesel to Rotterdam, 4 marks per 1,000 kilos. The distance is about 100 miles, and it costs us 15s. 6d. to convey our earthenware to Liverpool, 50 miles. Our hours are much shorter than those of any other country. Our wages are about 30 % higher than those of Germany, which is our most serious competitor in our home, colonial and foreign markets, and we are also handicapped to a considerable extent by the special rules lately forced upon us by the Home Office, and which either have no parallel in Germany or the cost of which is partially defrayed by the State.

STUBBS BROS., ARGYLE WORKS, FENTON, STOKE-ON-TRENT; Manufacturers of China.

Fancy articles upon which there is most profit are sold here cheaper than in foreign country of origin. Lower wages are paid in foreign countries, longer hours of labour, and less Home Office interference. Also lower railway freight charges.

TAYLOR & KENT, FLORENCE WORKS, LONGTON, STAFFS.; Manufacturers of China Ware.

Irish white and gold cups and saucers are imported below our cost price.

G. WARRILOW & SONS, QUEEN'S POTTERY, LONGTON; Manufacturers of China Tea and Breakfast Sets, &c.

Goods below our cost price come from Germany, Austria and France. Germany in particular imports into this country most of the goods we manufacture and offers at from 25 to 40 % under our prices. Fancy articles, such as sweet trays, cruets, moustache cups and saucers, decorated presents, &c., are sold at about what we have to pay for making only. Austrian view ware we really cannot reckon up at all, and certain articles are imported into this country for about what we actually have to pay for making only. So when decorated they must be sent here under cost of production.

WILD BROS., EDENSOR, CROWN CHINA WORKS, LONGTON, STAFFS.; Manufacturers of General China.

Competition exists against all goods we make, as any fresh designs or shapes brought out by us are soon copied and imported into this country, principally by Germany and Austria. Germany imports into this country below our cost price cups and saucers, egg-cups, tea and coffee pots, present ware, in fact, all we make; Austria imports tea sets and fancy goods of superior class; and France, afternoon tea sets and fancy goods. Wages in Austria, France and Germany are from 35 to 40 % lower than here. The hours of labour are considerably longer. Most of the foreign china imported is made of cheaper material than we can use, for local reasons. We are also subject to adverse freight and railway rates.

W. WOOD & CO., ALBERT STREET, BURSLEM; Makers of China Castor Bowls, Earthenware Knobs, &c.

The Germans are just now underselling us very much in castor bowls. Some years ago they brought to our markets certain small knobs, &c., which quite destroyed our trade. The value, perhaps, was not great, still, these little matters were valuable to us and found labour for our hands at decent prices; but now for some years we have not been able to sell because the German price was so low. About 30 years ago we supplied the London School Board with inkwells, we made a good article and obtained a decent price, and our workmen had good wages, but the Germans brought them in at about 35 % lower and took the orders; their inkwells were not so good, but they answer the purpose. Germans have sold in our country articles at less price than our workmanship came to, but no doubt in some cases if we had altered our method of making we could have produced them cheaper, but not at the German price or near it. We have often been puzzled to know how they could sell certain articles at the prices they did, and we have remarked more than once that even if the workmanship were nil we could not understand how they could sell at the price; it must have been dumping. If we take our branch of business—the brassfounder's china or small knob, &c., of various sorts—we can only believe that the Germans pay very low wages indeed in comparison to ours. If we take small decorated jars or trays such as used by electroplaters, we can only understand their very low prices by their paying very low wages and at times dumping.

C. 2,317. Earthenware Manufacturer.

So far as the British home market is concerned, the following figures will show what the policy of free imports is doing for the china and earthenware trades. Imports of earthenware and china from France, Germany, Holland and Belgium into this country:—1895, £630,457; 1896, £798,594; 1897, £851,636; 1898, £791,089; 1899, £863,262; 1900, £876,863; 1901, £945,097; 1902, £926,754.

There are 21 other replies to similar effect from manufacturers of china, &c., in various parts of the country, who do not desire their names to be published. They testify generally to importations at from 25 to 40 % below their cost price—in some cases the imported goods are said to be sold here at less than the English labour cost exclusive of materials, &c. A firm of manufacturers (FORM 6,460), who also have works in Germany and import china and glass of Continental make, declare that none of the lines they import are sold below cost of production; a firm of merchants (FORM 10,096) say:—“ We think our own people equally sinful in the system of dumping as any other country, and that goods are sold at a lower price than list for the sake of increasing turnover. We also believe that goods are sold in the countries of production at a higher price than with us, thus preventing our manufacturers competing with them here.” Four other anonymous replies bring out somewhat new points:—

FORM No. 10,363. Merchants dealing in Glass, Earthenware, China, Enamel Ware.

The goods of European and U.S.A. factories are gradually stopping us buying English products, the reason being that the profits for years past of all the works have been used to increase their works and to make them more efficient in machinery, as the scope for their trade is large. Had England been denied them they could never have fitted themselves up so well. The demand does not justify home firms investing their profits in their own factories. We always tell makers in Germany, Belgium, and France that goods are for England. They get a better price in their own countries.

C 53. Common China Manufacturer.

I should like to point out that the china branch of the Pottery industry has suffered, perhaps, more than any other trade in this country, by reason of the free importation of foreign manufactured pottery. Unfortunately, the Government has so far not seen fit to differentiate the value of china as against earthenware, although I believe they are pledged to make this distinction from the beginning of the ensuing year. It is the opinion, however, of all practical men that by far the greater proportion of such imports consists of china goods, and it is equally certain that almost the whole of the exported goods under this heading are earthenware, which is mainly sent to the United States.

The Pottery towns embrace a population of at least 60,000, and they contain 60 china factories, employing from 7,000 to 8,000 people, engaged mostly in the production of the cheaper classes of china. In the production of this ware, nearly half-a-million of money is directly or indirectly paid in wages annually, and as the imported goods far exceed in value our output, it is evident that a much larger sum than this £500,000 is lost yearly to British labour. This is exclusive of wages displaced in the earthenware and other branches of the crockery trade. Of all the trades in this country, few are suffering more from the competition of our foreign rivals, and when we point out that the value of the imported pottery (nearly all of which is china) has steadily increased until the figures for 1901 are nearly five times those for 1871, you will readily understand why our factories are working short time, our poor-rates steadily increasing, and our people standing idle.

C 205. China Merchant.

I am in the china, earthenware and glass trade, and I suppose there is no trade which suffers more from foreign competition, which, if allowed to go on, will close up most of the works and mean ruin to thousands.

C 1,586. Pottery Manufacturer.

The effect of dumping is absolutely disastrous on the trade. It unsettles prices, and nobody knows where he is. This question of "dumping" is the one thing which has turned me from being an ardent Free Trader into a convinced supporter of Mr. Chamberlain's policy. Dumping is a principle by which, if scientifically applied, the foreigner can destroy, whenever he chooses, any of our industries. It is not—as many people suppose—the disposal of the surplus stocks for the moment, but it is a definite principle which the foreigner is able to apply, and which we cannot. Dumping at all costs must be stopped, otherwise our industries are bound to go one after the other, and the reason is that the principal factor of cheapness in modern production is quantity of output, and not either cheap labour or cheap materials. Foreign competition in England is growing more and more. The effect of cheap china coming in indirectly affects the earthenware trade, and sooner or later we shall experience the same thing in earthenware, if we are not doing so to the full extent to-day. Our London agents are buying, free delivered in England, a china teapot, fluted white, at 2s. 9d. per dozen. This is not an odd line, but can be bought at any time. The cost of wages in England for making a similar teapot would be 2s. 9d., and at this price a workman can only earn average wages.

G. L. ASHWORTH BROS., HANLEY ; Manufacturers of Earthenware, Ironstone China (Domestic) and Sanitary Earthenware.

**Earthenware,
Sanitary Ware, &c.**

Foreign competition is felt by us in dinner services in earthenware and ironstone china. French and other foreign services are now largely sold in all the leading stores in London and elsewhere. In London the proportion probably reaches fully 50 %. In toilet services, too, the foreigner has commenced to compete, but not to any appreciable extent at present. Formerly we used to do a considerable business in insulators and battery cells, but now these are done very largely by foreign houses. In Germany wages are about 60 % of English. Hours of labour are longer, as about 10 hours a day are worked, and 6 days a week and sometimes 7. There are many branches of our trade which have been affected considerably through the importation of foreign goods. Dinner services of French china have been sold freely by most of the leading retail houses for some years past, and have displaced similar services made in ironstone china, which we formerly used to make in large quantities. Some classes of insulators and porous cells for electrical batteries, which we used to make, are now supplied from abroad. Some classes of fire-proof ware of our make have been displaced by foreign ware.

FORMS No. 2,488 and 5,181. Manufacturers of General Earthenware, Yellow Ware and Rockingham Teapots.

In common earthenware competition is generally from German cheap china, and runs upon small articles that help us to properly fill our saggars, such as egg-cups, pie cups, cider cups, candlesticks, jugs, creams, teapots, &c. In earthenware the Germans are now offering printed teacups and saucers, bowls, and hospital ware, such as bed-pans, sick feeders, &c. German enamelled ironware has robbed us of colanders, hand bowls, jugs, and many other lines of kitchen ware. It has an absolutely poisonous glaze, and shells off into the food of poor people. This competition with our yellow earthenware of German enamelled ironware has destroyed the sale of some lines almost completely, and, together with the extinction of the American trade during the last 30 years has reduced a body of 16 yellow-ware manufacturers to 5 only at the present time. The ware is made from a local clay found under the shallow seams of coal or turned out from the collieries here. German cheap china is much cheaper than English earthenware; candlesticks, decorated jugs, and many other lines are equally cheap. I will only refer to china egg-cups, with four gold lines, as a case in point; they are sold in London at 4s. 3d. per gross, delivered, and no charge for package. We make egg-cups in earthenware by machinery, with girls to attend to the machines; they are never touched by man's labour; we put two gilt lines instead of four, and this work is done by women. Our cost of these, including actual dead expenses, but no profit, is 5s. 3d. per gross on the works (i.e., no charge for carriage is included). I think there is no other firm in England that can produce them at this figure. The German and Dutch potters work at about 3s. 4d. per day, as against English potters at 5s. to 6s. per day. They both actually work at piecework, but the above is about the average day's wage. The Dutch hand their goods for export to the vessel by canal at about 6s. per ton, whereas from the Staffordshire potteries to Liverpool it is 12s. 6d. per ton. With their cheap timber, packages cost them very little.

JAMES BROADHURST & SONS, FENTON, STOKE-ON-TRENT ; Manufacturers of Ordinary Domestic Earthenware.

Our trade is subject to foreign competition owing to the hours of labour and wages paid, and higher cost in getting our raw materials into factory and putting finished goods into London and large provincial towns. Foreign goods are packed in cheaper packages and delivered free.

MASON CASH & CO., WOODVILLE, BURTON-ON-TRENT; Manufacturers of Cheap Earthenware and Porcelain for electrical purposes.

We experience foreign competition in porcelain for electrical fittings and all domestic earthenware, excepting the cheapest heavy articles made from local clay. French fireproof ware is our serious competitor now. On the Continent wages are lower; materials are obtained cheaper—china and ball clays from Cornwall and Devon are delivered cheaper to Germany and the U.S.A. than to the Midland counties of this country; Continental manufacturers are not hampered by stringent rules as to lead glazing, as we are. The British manufacturer has to incur very heavy expense in insurance against, and means to protect his workpeople from, the dangers of lead poisoning, and also in carrying out the Factory Acts and Employers' Liability Acts. We understand that this expense is much in excess of a Continental manufacturer's. German enamelled ironware is doing our trade very serious damage, as we make cheap domestic earthenware much in same lines as these enamelled iron articles.

ELIJAH COTTON, NELSON POTTERY, HANLEY, STAFFS.; Earthenware Manufacturer.

Foreigners sell at such low rates because of the difference in rates of wages and hours of labour. The German firms who compete with us in the home market are able to get the English clays (ball and china) on their works at a lower cost for freights than ourselves.

GRIMWADES LTD., STOKE-ON-TRENT; Earthenware Manufacturers.

Fancy articles for table use, such as cheese, butter, sardine dishes, &c., used to be sent from Germany in large quantities, but latterly we have been able to practically drive the foreigners out of our home market and also the Colonies. We do not know of a single article coming from abroad at the present time which we cannot supply at a profit in large quantities.

HENRY KENNEDY & SONS, BARROWFIELD POTTERIES, GLASGOW; Stoneware Manufacturers.

Our trade is subject to foreign competition because of the low price at which glass bottles and jam jars are produced abroad; this, again, being at least partly on account of low wages and long hours of work. The prices of our bottles and jam jars are affected by low-priced glass.

W. H. LOCKITT, WELLINGTON POTTERY, HANLEY; Manufacturer of Earthenware, Dinner, Tea and Toilet Sets.

No competition is experienced except in the case of the cheap foreign tea-ware, which, being made in china and sold in this country at about the same rate as English earthenware, seriously affects the sale of the latter. Cheap decorated cheese-stands and teapots are brought into England from Germany in exceedingly large quantities, below our cost price, also tea-ware, and there are signs of toilet ware soon making its appearance.

PEARSON & Co., WHITTINGTON MOOR POTTERIES, NEAR CHESTERFIELD; Manufacturers of Stone Bottles for Spirits, Jars, &c.

There does not appear to be any foreign competition with our trade, our prices being too reasonable to admit it.

FORM No. 3433. Manufacturers of General Earthenware.

Foreigners compete in fancy earthenware, *i.e.*, cheap vases, bread trays, sardine boxes, triple trays, &c., but recently we have been shown toilet and dinner ware in London from Germany, delivered free to customer's door, at prices considerably lower than we can compete at. A good deal of white china is sent into this country from Germany under our cost price for earthenware. We were asked to quote by our London agents recently for white fluted teapots, which they were buying from Germany in large numbers. Our price was 9s. a dozen. The price they are paying for them is 2s. 9d. per dozen. We pay for making alone 2s. 9d. per dozen. These teapots come into England regularly in large quantities. Rates of wages are lower and hours of labour longer. The benefit of the double market is of far greater importance than the price of labour. If the foreign manufacturer can increase his turnover by selling these goods at a lower price in England, it is undoubtedly of great benefit to him, as it reduces the cost of his production over the whole of his output; and it is a sound business policy to adopt. The possession of the larger market is the vital question. The introduction of machinery into the pottery business has been comparatively recent, and new machines are coming in every day, and in the course of the next few years machinery will be made much greater use of than at present. The great drawback to using machinery in our trade is the fact that you must produce on a large scale for this labour-saving machinery to be of any advantage. For instance, the decoration of pottery by lithographic transfer sheets has largely supplanted hand labour. We were one of the first to put these machines in, but we have found by experience that the machines are not of the advantage to us that we expected, because to make them really effective you want to produce about 2,000 sheets per week off one machine, and the output of our works is nothing like sufficient to keep them going full time. The result is we are working these machines $\frac{1}{4}$ time, and consequently the advantage accruing from the substitution of mechanical means for hand labour is lost to us. Saggars are now being produced by machinery; to make the machinery effective requires a large output, and we should barely require this machine to work more than one day a week to keep our place going at the present time. Again, there is a new kiln for firing enamel goods, which greatly lessens the cost, the saving in fuel being 70%; it also lessens the time in getting the ware through. But this again is of no advantage to us, because the output required for this machine is very great, and our works would have to be two or three times the size to reap the full advantage of such a machine. This is the crux of the whole position. The foreigner, by the aid of his tariff and the free market of England, is enabled to get his works on a large scale, and to introduce this labour-saving machinery to a far greater advantage than we can possibly hope to do. Pottery manufacturers, if they want to keep up with the times and compete with the Germans and Americans, will have to scrap their works and build new ones more suitable for a larger trade and for the employment of these labour-saving machines. If Mr. Chamberlain's scheme came into operation the first thing we should see would be the scrapping of the old

works in the Staffordshire district, and the building of up-to-date modern works, with every appliance for saving labour. We are scrapping our works, and building works on a much larger scale, so convinced are we that if we remain as we are it is simply a question of time, and we shall have to die out. If we have to go under, we prefer to do so after a fight than to take it (as Mr. Chamberlain says) "lying down." We feel very strongly on this question. In our opinion, English manufacturers are powerless against this system of "dumping," coupled with labour-saving machinery.

T. RATHBONE, NEWFIELD POTTERY, TUNSTALL; Earthenware Manufacturer.

Germans pay 2d. for toilet basins for which we pay 3½d. Their working hours are longer, with a six days' average of 12 hours. They also work until about noon on Sundays.

MELLOR, TAYLOR & CO., BURSLEM, STAFFS.; Earthenware Manufacturers.

The few closets sent here are certainly sold below cost of production in the U.S.A.

FORM No. 4,675. Manufacturers of Sanitary Earthenware.

From America: Centre outlet pedestal closet basin, white, at 6d. under cost price. Cut away front pedestal closet basin, white, at 4d. under cost. The competition experienced in our trade is an indirect one. The large quantities of cheaper varieties of domestic earthenware imported into this country having driven the English manufacturers of general earthenware out of their own market they have invaded ours in sanitary ware, and we in consequence are now suffering from their competition. The price to be obtained for our main line of manufacture is 2d. to 3d. below cost in the home market at present. The making price to the workmen in America being higher than our own (4s. 2d.—2s. 6d.) they must cost more than ours.

FORM No. 4,374. Manufacturers of Sanitary Pipes, Bricks, &c.

Sanitary pipes are being imported from Belgium, but not in quantities sufficient to damage our trade.

TWYFORDS, LIMITED, CLIFFE VALE POTTERIES, HANLEY, STAFFS.; Earthenware Manufacturers.

Closet basins at lower prices than we can make them from U.S.A.

GEORGE SKEY & CO., LIMITED, WILNECOTE WORKS, TAMWORTH; Manufacturers of Sanitary Drain Pipes, Closet Pans, Fire Bricks, &c.

Germans work longer hours and are paid less. Closet pans are imported into this country below our cost price from U.S.A., and chemical stoneware from Germany.

SANITARY POTTERY CO., LONGPORT, STAFFS.; Manufacturers of Sanitary Earthenware.

Some time ago we came across a lot of American closets which were imported at prices much lower than ours, but we have not heard of them lately. The English prices have fallen very much since then, and probably choked them off.

SAMUEL OWEN, 38, SUN STREET, FINSBURY, LONDON, E.C.; Manufacturer of Sanitary Earthenware—Lavatory Basins, Drain and Soil Pipes.

The U.S.A. import goods into this country at the same prices—free of charge for delivery—as we can from Derbyshire or Staffordshire, the seat of these manufactures. Sanitary goods are delivered into this Empire and its Colonies at same prices as the home makers supply. Dumped at cost of making. What the Americans paid us 10s. for and carriage to the States and packages in addition, they now deliver here at 10s. and packages free, viz., straw and crates.

J. BOLDING & SONS, LTD., GROSVENOR WORKS, DAVIES STREET, LONDON, W.; Sanitary Specialists and Manufacturers of Baths, &c.

From America: brass fittings for baths, lavatories and closets; Germany, France: electric light and bell fittings; Belgium, France: marble and slate work.

THE NORTH BITCHBURN COAL CO., LTD., 129, VICTORIA ROAD, DARLINGTON; Makers of Sanitary Pipes, &c.

We do not suffer from foreign competition in the home trade.

HENRY BODEN & CO., POOLE, DORSET; Ball Clay Merchants.

We believe the importation of foreign crockery is on the increase to the detriment of our customers in Staffordshire Potteries, &c. The increase in the output of potteries in the United States and Germany have largely affected our customers, and consequently they buy less ball clay from us than formerly.

E. B. FISHLEY, FRÉMINGTON, N. DEVON; Potter.

Art pottery. Not much foreign competition.

TOOTH & CO., BRETBY ART POTTERY, WOODVILLE, NEAR BURTON-ON-TRENT; Manufacturers of Artistic Pottery.

Some of our designs are copied by the Germans and offered here 33½% below our wholesale prices.

FORM No. 2,145. Rustic Art Ware Manufacturer.

We originated small green hand-carved Sussex pottery pigs a few years back, and found a good demand for them; pattern ones were sent by a London agent to Vienna, moulds were cast from these and they are now sending back many thousands roughly-made bad imitations, which are being sold as "Sussex Pigs" at 2½d. each, ours retail at 1s. each, the very lowest they can be sold at, being entirely hand-made and not moulded as the foreign imitations are.

KING BROS., PENN STREET, BIRMINGHAM ; Crucible and Firebrick Makers.

Crucibles from Germany are imported here at from 20 to 30 % below our own selling prices.

JAMES BATY & SONS, BOTCHERBY, CARLISLE ; Builders, Brick and Tile Makers.

Very little foreign competition in brickmaking. In our building department foreign ironwork (girders principally) is far too much used, to the detriment of our home makes. Foreign cement is running our home-made Portland cement out. Although I believe it is very inferior stuff it finds a large market.

BRACKNELL BRICK & TILE CO., LTD., WICK HILL, BRACKNELL, BERKS. ; Manufacturers of Bricks and Roofing Tiles.

There is very little foreign competition in the brick and house-tile trade. Some red facing bricks are brought into the Thames from Holland, but they have no appreciable effect upon our market. We have had inquiries for red facing bricks for Cape Colony of late years, but have done no business with them, presumably owing to our price (*plus carriage via Southampton*) proving too high.

JOHN T. CHAPPELL, FONTLEY BRICK & TILE CO., FAREHAM, HANTS ; Manufacturer of Bricks and Roofing Tiles.

My sales have been for the home market. We have not experienced any foreign competition in any of the goods we manufacture. I feel the need of some alteration in our fiscal policy to be great.

CHARLES DAVISON & CO., LTD., EWLOE, NEAR CHESTER ; Manufacturers of Fire Bricks and Fire-clay Goods, Acid-proof Bricks and Clay Goods, Paving Tiles, Ridge Tiles, Engineering Bricks, and Facing Bricks.

We have to insure against the operation of the Employers' Liability and Workmen's Compensation Acts, amounting to a serious annual tax. We are annually put to serious expense in order to bring ourselves into line with the requirements of the factory inspectors, who order fresh things to be done every time they visit the works, the whole amounting to a serious tax. Our wages are considerably higher, and our hours of labour much shorter than the same class of workman has in foreign countries. The majority of our men only work from 6 to 8 hours a day, none more than 9½ hours.

THE GLENBOIG UNION FIRE CLAY CO., LTD., 48, WEST REGENT STREET, GLASGOW ; Manufacturers of Fire Bricks, Sanitary Pipes, Fire-clay Goods.

We experience foreign competition in fire bricks of a kind suitable for resisting action in certain parts of gas and glass furnaces. Fire bricks are so abundantly made here at all prices that there is no foreign competition in our home market beyond what we have stated in the case of gas and glass works.

HARRIS & PEARSON, FIRE BRICK WORKS, STOURBRIDGE ; Manufacturers of Fire Bricks, Gas Retorts, Glass house Pots and other Fire-clay Goods.

There is some foreign competition in fire bricks, gas retorts and clays, but we suffer more in consequence of the iron, steel, glass, chemical and other manufacturers, who are the chief users of our goods, being so injuriously affected by foreign competition. Our fire bricks, &c., are used for the erection of furnaces and other apparatus for the reduction of raw material, and in consequence of so much foreign pig iron, steel bars, &c., &c., being dumped in this country, the furnaces are not required to reduce the ores and minerals to the extent they formerly were, and should be. Foreign goods are not imported below our cost price at works, but the railway charges on our goods are on so high a scale compared with water-delivered goods at waterside works that they come in at a competitive price. It seems to us desirable that as much raw material as possible be used up in this country and that the working-classes get the benefit of the cost thereof in wages.

HATHERN STATION BRICK & TERRA COTTA CO., LTD., TAMWORTH ; Brick and Terra Cotta Manufacturers.

Our trade is almost entirely for the home market. Occasionally terra cotta is sent to South Africa. If other manufacturers were kept employed in this country the money would be forthcoming to build here, and our trade would be better. When the foreigners are making the money they do not come over here and build, or buy our products.

H. E. HAYES, BURNHAM, SOMERSET ; Manufacturer of Brick, Tile and Land Drain Pipes.

The Germans send bricks into London.

THE HOLLYBROOK BRICK CO., LTD., CHESTER PARK, KINGSWOOD, BRISTOL ; Brick Manufacturers.

Our brick trade is purely a local trade, and we fear no foreign competition owing to the weight of bricks and the comparative cheapness of manufacture in this country. But as business men we are in favour of preferential tariff reform.

FORM No. 5,679. Manufacturers of Bricks, Tiles, and Terra Cotta.

Our trade has suffered, not from the importation of goods of similar class, but from that of goods of a different class, which are substituted for ours. Facing bricks of all kinds are being displaced by cement flooring made from cement imported from Belgium or Germany. This is especially noticeable in the vicinity of Hull and other eastern ports. Bricks are displaced by imported cement.

FORM No. 2,462. Fire-clay and Fire Brick Manufacturers.

Fire bricks are imported from Germany and Belgium 20 to 30 % below our cost price.

FORM No. 2,000. Manufacturers of Fire-clay Gas Retorts, Fire Bricks, Enamelled Bricks, &c.

We have no foreign competition in our goods directly owing to cost of transport, but find trade declining in consequence of severe foreign competition with our customers in the glass, chemical and iron trades, who chiefly buy our manufactures.

THE NEW PETERBOROUGH BRICK CO., LTD., PETERBOROUGH; Brickmakers.

Cost of transport prevents foreign competition affecting us.

NOEL BROS. & CO., LTD., PRUDENTIAL BUILDINGS, CARDIFF, WORKS AT LLANTRISANT AND TONDU; Manufacturers of Sanitary Pipes and Fittings, Fire Bricks, Dinas Silica Bricks and Chimney Pots.

Silica fire bricks from Germany and silica fire bricks and blocks from Belgium are imported below our cost price. They must be sold under cost as they are delivered to works in our locality at less than we can produce for. We are willing to furnish information upon the indirect loss of business in fire bricks and kindred goods used in the local iron, steel, copper, and tinplate works through these works being shut down, or on short time because of foreign competition.

LUCAS BROTHERS, LTD., TEAMS FIREBRICK WORKS, DUNSTON, GATESHEAD-ON-TYNE; Manufacturers of Fire Bricks and other Fire Clay Goods.

Up to now there have only been isolated cases of imports of fire bricks into this country. Last year however a local colliery firm gave the contract for building some coke ovens to a foreign firm and this latter firm insisted upon using bricks from Germany or Holland, a lot of 1,200 tons being brought to the very home of the English firebrick trade. A duty on bricks would in all probability have kept the order here. Where we feel the harm mostly is indirectly; for instance, large quantities of iron and steel goods are dumped into this district, with the result that local manufacturers of iron and steel have less to make, which means that they use less of our products; also when the ironworks are slack they use less coke, therefore the collieries make less, and the less they make the less firebricks they consume. If this dumping could be stopped it would be largely to our interests. This argument also applies equally to the cement works in this district, where a large quantity of foreign cement is imported, to glass works, bottle works, and numerous other works.

PARAMONT & SONS, WESTWOOD, NEAR MARGATE; Brickmakers.

The ordinary stock brick is produced in Belgium and in France, and although not quite so well manufactured is of equally good metal and can be loaded into craft alongside in the country of origin for 20% less than it can be produced here. None of these imported articles are placed upon the British market at less than the normal cost of production in the country of origin. Our trade is subject to foreign competition, and during busy times, such as 1899 and 1900, we imported millions of bricks and sold them at from 10 to 15% less than they could be purchased for in this country. Although not cement manufacturers, we feel that this is a question which may here be referred to. At present moment we are using cement manufactured at Tournay, Belgium, which is loaded into our barges at Nieuport for 16s. 10d. per ton; the cost of freight is 5s. per ton; making, 21s. 10d. per ton. The lowest price at which we can purchase best English cement—which is certainly not superior in quality—is 23s. per ton into barges in the Medway. The freight to Margate would be 2s. 6d. per ton, making 25s. 6d. per ton, a difference in favour of foreign cement of 3s. 8d. per ton. We have, however, just placed before us a quotation from a cement manufacturer (not a member of the Association of Portland Cement Manufacturers) of 21s. per ton, loaded into our barges in the Medway.

E. J. & J. PEARSON, LTD., STOURBRIDGE; Fire Clay and Fire Brick Manufacturers.

German fire bricks and retorts have been shipped lately to England, but we have not come in contact with them ourselves. German and Belgium fire clays are imported by several glass makers for use in their melting pots, to the detriment of the English clay trade.

T. & M. PLOWMAN, LTD., UPPER EDMONTON, LONDON, N.; Brickmakers.

Have three brickfields. One has been closed on account of slackness of trade for the past three years, caused, we believe, by the general absence of spending power throughout the country.

THE PLUCKLEY BRICK AND TILE CO., LTD., PLUCKLEY, NEAR ASHFORD, KENT; Manufacturers of Bricks, Tiles, &c.

During 1899 and 1900 bricks were landed at Folkestone and Dover from Belgium, but inasmuch as we were selling all we could make, it did not affect us. Prices here were rather high; otherwise I do not think they would have been able to compete.

SAXON BRICK CO., LTD., PETERBOROUGH; Brickmakers.

Cost of transport prevents foreign competition affecting us.

THE SILICA FIRE BRICK CO., OUGHTIBRIDGE; Manufacturers of Silica, Magnesite, Ganister, and Fireclay Bricks.

Fire and silica bricks are imported from France, Germany, and Belgium, and magnesite bricks from Austria below our cost price, and below the normal cost of production in the country of origin. Hours of labour in these countries are about the same as ours, rate of wages somewhat lower.

Foreign Competition at Home FORM No. 5,679. Brick and Tile Manufacturers.

Our trade has suffered, not from the importation of goods of similar class, but from that of goods of different class, which are substituted for ours.

Bricks, &c.
—continued.

There are 26 replies to similar effect from other manufacturers of silica bricks, fire bricks, and other classes of bricks. They speak of importations below British cost from Germany and Belgium, and the importation of magnesite bricks from Greece is spoken of in one case. One firm state they had to reduce their prices 20 % in consequence of these importations, and unless remedial measures are adopted a great deal of the brick trade of the United Kingdom will be lost. In 5 cases it is noted that the cost of transport protects British manufacturers from any injurious effect on account of these importations.

Tiles, &c.

Craven, Dunnill & Co., Jackfield, Shropshire; Manufacturers of Floor Tiles, Enamel, Wall, Printed and Painted, Majolica and Embossed Tiles, &c.

White wall tiles and enamelled (coloured) tiles are imported from Holland and Belgium below our cost price, if cost includes cost of pure manufacturing from raw clay to warehouse, raw material at works, and fixed charges (proportional). In the case of white wall tiles, we are informed:—That there is no china clay, Cornwall stone, flint or ball clay in Holland. That the first named has to come from France or England, the second named from England, the third named from France, the fourth named from England. That fuel has either to be imported or has a long haulage, and is as dear as or dearer than at similar works in England. That these facts tend to increase the cost "in warehouse at works" above the cost these tiles would come in at to the English maker. That the foreign maker has no process for making these tiles differing from the English methods. That the items of wages and hours give an advantage of from 20 to 25 % in the former, and 16½ % in the latter. That the price for these tiles per square yard is in Amsterdam 6s., wholesale; and in London, 5s., wholesale, after a longer carriage, shipping charges and agency, &c., are paid. Taking all the disadvantages and advantages into consideration we are of opinion that 5s. is below the true cost price per square yard in London. Wages are from 20 to 25 % below English rates in Holland and Belgium, in similar branches. Hours are 60 or 63 per week in these countries as against 49 or 50½ in England. Carriage is at a lower rate per unit of weight per unit of distance. Local rates do not press so heavily on manufacturers in Belgium and Holland as in England. There are no royalties abroad. We are unable to point out any specific case in 1903, though we know we lost a considerable amount of trade with ironmongers in coloured enamels supplied by Dutch tiles.

C. O. FISON, LTD., STOWMARKET; Brick and Tile Makers.

No kiln tiles of foreign manufacture are brought to this country. The brick trade is of course simply local.

A. GODWIN, LTD., TILE WORKS, LECKHAMPTON, CHELTENHAM; Tile Manufacturers.

Generally speaking we do not suffer from foreign competition in our line of goods, but Dutch enamelled tiles are imported from Holland. These are not sold below our cost price of making, but we have sometimes lost orders owing to their low prices. Trade has been very bad, and we know that these Dutch tiles are sent in here and sold at a very low price, in fact 25 % under our lowest prices.

FORM No. 3,610. Manufacturers of Glazed and Enamelled Hall Tiles, Paving Tiles, Roofing Tiles.

Plain glazed hall tiles are imported from France, Germany and Holland below our cost price. The above class of tiles is the only one which is sold in large quantities and without plans and drawings, and is thus more open to foreign competition as there is not the same necessity for the customer to be in as close touch as possible with the producer. The normal cost of production in the countries named is lower than in this country. The question of the relation of wages to cost of production in this trade is a very important one as it comprises a greater proportion of cost than in most trades.

SOMERSET TRADING Co., LTD., BRIDGWATER; Manufacturers of Roofing Tiles, Bricks, Floorings, Mouldings, &c.

No foreign competition in bricks and tiles for the home market. The importation of foreign prepared floorings is very heavy. This is a trade that has increased enormously of late years. Foreign mouldings, doors and joinery are also imported. These goods could be manufactured quite as well and cheaply in England if the flooring mills were once established here.

GEORGE WOOLLISCROFT & SON, LTD., HANLEY, STAFFS.; Manufacturers of Floor and Wall Tiles, Mosaic, Faience and Terra Cotta.

We meet a lot of competition from foreign opaque glass used for walls in place of tiles, all of which might easily be made in this country if the industry were protected. A quantity of cheap Dutch, French and German tiles also comes in.

T. A. SIMPSON & Co., LTD., FURLONG TILE WORKS, BURSLEM; Tile Manufacturers.

Our trade is subject to adverse competition from foreign countries for the following reasons: Holland, import duty, but not to a great extent. France, cheap labour and cheaper transit rates. Germany, cheap labour, cheaper transit rates and longer hours.

FORM No. 1,965. Manufacturers of Encaustic and Mosaic Tiles for Floors, Walls and Hearths, Art Pottery and Sanitary Earthenware.

Glazed tiles, red floor tiles and pottery, are imported from France below our cost price and electrical porcelain from Germany. We suffer from competition both through rates of wages and hours of labour.

FORM No. 2,276. Manufacturers of all descriptions of Tiles for Floors, Walls, Hearths, &c.

Glazed and decorated tiles are imported from Holland below our cost price.

FORM No. 2,425. Manufacturers of Roofing and Paving Tiles.

A lot of glazed and other tiles are imported from Holland, and the carriage to London from Holland is less than that of similar tiles from here to London.

(D) FOREIGN COMPETITION IN FOREIGN AND COLONIAL MARKETS.

Foreign Competition
Abroad

QUESTIONS 7 AND 9 (FORM I.) AND QUESTION 12 (FORM VIII.):—*Has your export trade suffered in recent years by the operation of the tariff of any country? What is your experience in respect of foreign competition in the Colonies in your trade? Have the trades similar to yours in Germany, the U.S., Belgium or other foreign countries made any inroads on any markets, hitherto largely supplied from the United Kingdom, in any branch of business in which you are engaged?*

CHARLES ALLERTON & SONS, PARK WORKS, LONGTON, STAFFS.; Manufacturers of General China, Earthenware, Fancy Goods. China

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Our export trade has suffered through foreign tariffs, notably earthenware to the U.S.A. There is very little foreign trade in china ware. In the Colonies the principal competition is from Germany and Austria—in cheap china teas and staple china goods.

J. AYNLEY & SONS, LONGTON, STAFFS.; China Manufacturers.

I cannot do any business in France, Germany or Austria owing to great cost of delivery and tariff; I cannot trace any other cause. I once had a decent trade in France.

BARKER BROS., LTD., MUIR WORKS, LONGTON, STAFFS.; Manufacturers of General China and Earthenware.

We have no export trade with foreign countries as the high tariffs have kept us out, but we believe that our home trade has suffered indirectly through these tariffs, in this way, that through keeping us out they have got a bigger price for their goods and consequently have been able to come into our market and sell their surplus at much below our prices. Our experience is that we have not suffered from foreign competition in the Colonies but then we only do business with South Africa, where there is a rebate allowed.

BISHOP & STONIER, HANLEY, STAFFS.; Manufacturers of Dinner Ware, Toilet Ware, Tea Ware, &c.

The U.S.A. now largely supplies herself with toilet ware, which we used to send her; Belgium and France both supply themselves with a good deal of earthenware they used to buy from us. Our trade has not suffered in recent years more than previously. Foreign tariffs are a constant check upon our export trade. We have had some competition of foreign earthenware in Australia, but have been able to hold our own because of the quality, though the price might possibly have ruled a little higher had it not been for this competition. The adverse competition we suffer in the U.S.A. is entirely owing to their protective tariff—60%. The tariff in both France and Belgium also militates against us seriously in our trade with those countries, though doubtless they have an additional advantage over us both in the rate of wages and the hours of labour.

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BLAIR & CO., BEACONSFIELD POTTERY, LONGTON, STAFFS.; China Manufacturers.

Our trade with the U.S. and Russia has all gone; with Australia it is very small, and with France, Germany and Austria is very much less. We make a speciality of supplying Germany. France and Austria, and we only keep our little remaining business together by spending large sums of money annually in the production of novelties in shape and design, which when successfully established are copied by the Germans, who will copy any shape or pattern for a paltry order of £10 or £20. We have practically lost Australia through competition, especially of Germany. Since the war we have done next to no business in South Africa through German competition.

BLYTH PORCELAIN CO., LTD., BLYTH WORKS, HIGH STREET, LONGTON; Manufacturers of General China.

Our export trade has been practically killed owing to the excessive tariff. We have the greatest possible difficulty in doing business in the Colonies owing to the excessive competition, which bears very unequally.

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E. BRAIN & CO., FOLEY CHINA WORKS, FENTON, STAFFS.; General China Manufacturers.

There is practically no foreign trade in our china owing to the high tariffs. In the Colonies it is the same thing all round. The foreigner is a terrible plague in all our markets and wants choking. Foreign trades have made inroads in the following markets: Australia, New Zealand and South Africa.

SAMPSON BRIDGWOOD & SON, ANCHOR POTTERY, STAFFS.; Manufacturers of General China and Earthenware.

In Australia dealers can sell foreign tea sets at about the same price as we want for them here.

H. J. COLCLOUGH, GODDARD STREET, LONGTON, STAFFS.; Manufacturer of General China, chiefly Tea and Breakfast Ware.

France and Germany compete in South Africa, and Germany and Austria in South Africa, Australia and New Zealand. I recently arranged with an agent for Australia and New Zealand and endeavoured to stipulate he should not sell any foreign china, on which he declined to proceed any further on the ground that his sales of foreign china in Australia were greater than English. Consequently, I had to withdraw this stipulation and take what terms I could get. Foreign trade in English china is practically extinct, as the continually increasing tariffs abroad render it impossible to do any business.

W. E. COPELAND & SONS, STOKES-ON-TRENT; Manufacturers of China, Earthenware, Parian, Stoneware, &c.

We should say that our export trade has suffered in recent years, generally on the Continent and partly in the U.S.A.

EDWARDS & BROWN, HIGH STREET, LONGTON; Manufacturers of General China.

France and Germany compete in Canada, and Germany and Austria in the other Colonies, and among them they have taken from us a considerable trade throughout the northern coast of Europe. A small trade we had with Holland has completely gone, and any effort to recover it seems utterly hopeless against their tariff. We have a sample by us, which our traveller brought from Canada in November last, of German-made goods sold at 4s. 6d. plus freight (about 6d.), which would cost us at least 5s. 6d. for labour and 5s. 6d. for material (total 11s.), and would in our opinion cost them at least 4s. for labour and 4s. 6d. for materials (total 8s. 6d.).

E. B. FINCHLEY, FREMINGTON, N. DEVON; Potter.

Yes; the American tariff.

HILL & Co., LONGTON, STAFFS.; Manufacturers of General China and Fancy Goods.

We send very little of our china to other countries owing to the high foreign tariffs. Foreign countries undersell us in the Colonies.

E. HUGHES & Co., OPAL CHINA WORKS, FENTON, STAFFS.; Manufacturers of China Ware.

We have been in business at our present works for some 15 years and we have never found ourselves able to get any business worth speaking of with any foreign country. A few years ago we had a very good trade with Australia. By means of cheaper freights, &c., the Germans have been able to take practically the whole of that trade from us. We may say that there are signs of our trade with Canada improving under the operation of the preferential terms which are now given to British goods.

A. B. JONES & SONS, GRAFTON WORKS, LONGTON; Manufacturers of General China and Fancy China Goods.

We do no china trade except with our Colonies, viz., Australasia and South Africa and Canada, owing to heavy protective tariffs. The inclination in the Colonies is to take our goods unless the difference between our prices and foreign competitors is too great; but in many cases we are cut out for the same reason as those given for excessive imports into our own country, viz., cheaper freights and no tariff combined with cheaper materials and lower wages.

THE LONGTON PORCELAIN Co., VICTORIA WORKS, HIGH STREET, LONGTON; Manufacturers of China Tea and Breakfast Ware.

We are practically shut out by the tariff wall. We used to supply goods to a firm in Paris, but the duties made it quite impossible for us to compete. The Germans are ousting us by means of their surplus production both in South Africa and Australia. They are offering in both countries goods delivered at the prices we ask at our factories. A quantity of these goods are first brought to this country and then re-exported as British goods.

THOMAS MORRIS, LTD., REGENT WORKS, LONGTON; Manufacturers of General China and Fancy Goods.

There is practically no trade in our china with foreign countries owing to the high foreign tariffs and the fact of our shapes and patterns being copied and produced by the foreigners at much less prices. I have lost more than half my trade with America since they increased their tariff to 60%. My Australian agent writes me saying that Germany can deliver china to his clients 25% (and more in some articles) below the prices he can offer, with free packing, &c. In my case I have to charge about 3% for packing and packages. I have letters to the same effect from my African and Canadian agents.

PARKYN & PETERS, 32, QUEEN VICTORIA STREET, LONDON, E.C.; China Clay Producers.

Our trade has suffered by the operation of the tariffs in America, France and Russia. We pay 2½ dollars per ton on all china clay going to America, irrespective of quality. Some grades we sell at 10s. to 12s. f.o.b. Cornwall, and yet have to pay above duty on such clay entering the States. France charges us 3 frs. 50 c. per 100 kilos on our clay going into that country. We export chiefly to India and Canada.

PULHAM & SON, 71, NEWMAN STREET, OXFORD STREET, LONDON, W.; Manufacturers of Pulhamite Stone.

We export a small quantity to the United States, and from the large number of enquiries we receive, are convinced there is a large business to be done but for the tariff.

REDFERN & DRAKEFORD, BALMORAL WORKS, LONGTON; Manufacturers of General China and Fancy Goods.

We can do little or no trade with foreign countries consequent on the high tariffs. Our experience in the Colonies is that the continental manufacturer is getting orders which should in our opinion be placed in the Potteries, and Longton especially has been for some years and is at the present time suffering considerably through foreign competition in china manufacture.

RIDGWAYS, BEDFORD WORKS, STOKES-ON-TRENT; China Manufacturers.

Our particular trade has not suffered to any appreciable extent in foreign markets, taken as a whole, owing to the fact that we make specialities, but the trade generally, notwithstanding the increased demand of the world for pottery, has not obtained its share of that increase. For example, in the last 5 years our export trade only increased 2½ per cent. on a trade of £2,000,000, while that of Germany on a trade of £2,900,000 increased 31½% and that of France on a trade of £923,000 increased 40%. Our export trade has suffered

decidedly in respect of the McKinley and Dingley tariffs in the U.S.A.; our trade in earthenware and china fell from £955,000 in 1895 to £498,000 in 1902. Germany is becoming a very serious competitor with us in the South African and Australian markets.

SAMPSON SMITH, LONGTON, STAFFORDSHIRE; China Manufacturer.

Yes. France and Germany in Canada; Germany and Austria in S. Africa, Australia and New Zealand.

STUBBS BROS., ARGYLE WORKS, FENTON, STOKE-ON-TRENT; Manufacturers of China.

Our class of goods are sold in U.S. establishments at a certain price and when the tariff is high it cuts us out. We sell a certain class of goods in India on which we do not at present experience any foreign competition. In Australia and Canada however we are cut out by foreign competition in tea sets.

TAYLOR & KENT, FLORENCE WORKS, LONGTON, STAFFS; Manufacturers of China Ware.

We have never been able to do business with any foreign country owing to high tariffs. Foreign competition has been very disastrous in Canada; the French and Germans took the whole of the trade about 10 years ago. At the present time foreign competition is very keen in South Africa. Foreign trades similar to ours have made inroads on our markets in South Africa, Canada, Australia and New Zealand.

TOOTH & CO., BRETBY ART POTTERY, WOODVILLE, NEAR BURTON-ON-TRENT; Manufacturers of Artistic Pottery.

Previous to the introduction of the McKinley tariff we were doing a fair business in the U.S., but since our trade has been practically nil. Our colonial agent writes:—There is no question but that your trade is hampered very much indeed by the cheap goods imported from the Continent and Japan. Personally I am of opinion that if a heavy rate was imposed on foreign, or a preferential rate (a heavy reduction) made for English goods, and so level up the big discrepancy in the hours of labour and in wages, a larger trade in your goods would be done. In addition to the foregoing advantages the foreigners have the heavily-subsidised shipping lines to carry their products at reduced rates to our various Colonies.

G. WARRILOW & SONS, QUEEN'S POTTERY, LONGTON; Manufacturers of China Tea Sets and General and Fancy Goods.

We have tried several times to export and have goods suitable, but have not met with any amount of success and of course conclude it is the high tariff which keeps us out. We are very big sufferers in the Colonies and this is caused through foreign competition, which agents inform us is chiefly through cheap German rubbish, as they term it.

WILD BROS., EDENSOR CROWN CHINA WORKS, LONGTON, STAFFS.; Manufacturers of General China.

There is very little trade in our china with foreign countries owing to the high tariffs.

FORM No. 2,145. Rustic Art Ware Manufacturer.

I am now making arrangements with an American firm in London to introduce our productions in America, for which they tell me there will be a large sale if the price can be arranged; but on the first consignment sent them I have had to give an extra discount, beyond our usual, because of the high tariff they will have to pay to get it into America; this tariff, which is, I believe, 60% on decorated pottery, will almost prohibit the introduction of our ware into that country in any quantity we are afraid, though many Americans have told us there would be a large sale for our hand-made pottery in their country.

FORM No. 4,501. Manufacturers of China Lock Furniture and Porcelain Electrical Fittings, &c.

Five years ago we exported about £4,000 per year—goods mostly of English design. Last year we exported about £50. The Germans have copied our designs and cut us out of their market, besides having flooded ours with cheap stuff at less than our cost. We are not now working more than half time. We have very little competition in the Colonies in lock furniture, and as we do not sell electrical work completed, do not send any to the Colonies.

FORM No. 4,593. Manufacturers of China and Earthenware.

Our export trade has suffered. The McKinley tariff stopped a great many English goods of the commoner grades going to the U.S.A. at all, and rendered white granite ware (the staple trade) unprofitable to English makers. The Cuban market is also now in the hands of the American, and the same remark applies to Honolulu and the Hawaii Islands, with which we used to do a large trade. This is probably owing to tariff arrangements with America. The Germans especially, and the French somewhat, undersell us in the Colonies, the same as they do in England, especially in cups, saucers and bowls, besides goods enumerated for England (china dessert and dinner ware, candlesticks, trinket sets, vases and ornaments, match boxes, ash trays, moustache cups and saucers, egg-cups, cruets).

FORM No. 6,671. China Manufacturer.

Trade in common earthenware plates, bowls, teas, jugs, mugs, chambers white, sprayed and painted, has decreased very much indeed for Mexico and South America specially Brazil, and is now being done principally by German manufacturers. Trade we used to do with the Hawaiian Islands regularly for the last 20 years is now being done by the Americans; they have also got the Cuban trade, thus conclusively proving that when they get hold of a country by the tariff treaties, we English manufacturers are at once shut out; they supply themselves also now with large lots of C.C. white (common goods, also painted and sprayed goods) that we used to supply them with years ago; this is principally since the McKinley tariff came in; we have lost since then one account alone of about £4,000 a year.

There are 14 similar replies from other china manufacturers, who do not wish their names disclosed. They speak of acute German and Austrian, and in some cases French, competition in Canada, Australia, New Zealand, and South Africa, but for which their Colonial trade would be extensive and remunerative.

Earthenware

Our trade has suffered in recent years through the heavy American tariff on our goods. About the middle of the '70's we began to feel the keen competition of the continental manufacturers; at that time we considered ourselves a foreign trade house, which had taken several generations to build up. We did all in our power to retain the trade; we put down every new method of machinery to cheapen the cost of production, and studied the requirements of our customers so as to give them exactly what they wanted. Our correspondents abroad ranked high in the commercial world, and we had every confidence in the information they gave us from time to time, but in consequence of the cheapness of labour on the Continent, compared to what it is in this country, we were beaten by 12½% to 20%; consequently by degrees lost our trade with Rio de Janeiro, Pernambuco, Bahai, Para, Santos, Rio Grande do Sul, Montevideo, Buenos Ayres, Rosario, Cordova, Lima, Valparaiso, Cuba, Venezuela, Java, Straits Settlements, Singapore, Burmah, India, with the exception of a small percentage (not exceeding 6% of best goods, and naturally for these goods there is only a very limited and uncertain demand). Being driven out of said markets, we had to look for new ones, and we opened up a new trade with Australia, New Zealand, Ceylon, South Africa, Canada and the U.S.A., and home trade. Our opinion is that we shall gradually lose the trade through the heavy duties, and we are afraid our Colonial and home markets will be attacked by the continental manufacturers as they increase their output. If they do so (and this is our firm belief), they will undersell us, unless we have some form of preferential duties.

C 1,586. Pottery Manufacturer.

There seems to be a decreasing demand for English earthenware, which is mainly due to the high tariff which is at present in force in Germany, France, &c. There is a great falling off in the demand for English tea services in New Zealand; the foreign white and gold are now cutting them out to a very great extent. I anticipate the preferential tariff will be of considerable assistance. One customer at Oudtshoorn has just compared the price of last consignment of teas with a consignment recently delivered by a German firm. Ours are not decorated in so expensive a manner as their white and gold. Ours work out thus: Landed cost (including inland carriage), 3s. 8d. per dozen of 12 pr.; German white and gold, landed cost (including inland freight), 2s. 8d. From an experience in dealing with these matters during the last 20 years I am able to show that on every occasion when a treaty expired and had to be renewed a higher duty has been imposed, and the difficulty of doing business has thereby been considerably increased.

WILLIAM ALLEN, BENTHALL POTTERY, BROSELEY, SHROPSHIRE; Manufacturer of Common Earthenware, Electrical Pottery, and Art Bases for Petroleum Lamps.

What little export trade we did was killed by the manufacture of the same kind of goods both in our own Colonies and in the U.S. Some years ago we used to send common brown Rockingham teapots to Canada, U.S., and Australia. We were informed by the merchants that Canada had begun to manufacture such things and also Australia. The tariff killed the trade with the U.S. The Colonies have begun to make common earthenware goods such as teapots, which sell in this country wholesale at about 3½d. each, or, more correctly, from 2½d. to 5d. each.

G. L. ASHWORTH BROS., HANLEY; Manufacturers of Earthenware, Ironstones, China (Domestic) and Sanitary Earthenware.

The U.S. market used to be the largest foreign market for the exportation of Staffordshire-made earthenware. Whilst our exports to this market have declined for some years past, the exports from Germany have largely increased, and manufacturers in the U.S. have been supplying an ever-increasing quantity for their home consumption. This principally applies to general domestic ware. In sanitary ware English manufacturers have lost ground in the Continental markets, in consequence of France and Germany making and selling their goods. Our export trade has suffered also in France. With regard to foreign competition in the Colonies, speaking generally, there is a great deal of Continental made china (more particularly) and earthenware (in a lesser degree) sent to the Colonies which might as well go from this country, but, owing to the cheaper prices of the foreigners, they capture the trade of these markets. No doubt in this respect Mr. Chamberlain's proposed scheme of preferential tariffs would be of the greatest possible benefit to the china and earthenware trade.

W. & J. A. BAILEY, ALLOA; Earthenware Manufacturers.

Our export trade has suffered very much indeed in America, Canada, Australia and New Zealand, Germany and France. In America, Canada, Germany and France it has been reduced 80%, and in Australia 50%. Australia, New Zealand, Canada (in spite of preference), and India are being flooded with similar goods to ours. The duties in Germany, U.S.A., and France are so high that we are excluded, whereas in the past we did a very large trade, over £4,000 per annum; now nothing.

J. BROADHURST & SONS, FENTON, STOKE-ON-TRENT; Manufacturers of Ordinary Domestic Earthenware.

The McKinley tariff reduced our exports to the U.S.A. We believe we have lost considerable trade in South Africa, Australia and Canada, to some extent, owing principally to German competition. We are certain that in India we have been completely knocked out by German and Dutch makers within the last few years.

CAPPER & WOOD, BRADWELL WORKS, LONGFORD, STAFFS.; Manufacturers of Coloured Earthenware in Teapots and Fancy Goods.

Our trade is growing in France and also in South America. We have lost trade at the Cape and in Natal, but are not aware of any tariff that has caused this. Our Colonial trade is steady. We are not aware of any foreign competition in our class of goods in the Colonies.

MASON, CASH & Co., WOODVILLE, BURTON-ON-TRENT ; Manufacturers of Cheap Earthenware and Porcelain for Electrical Purposes.

The tariff of the U.S.A. has entirely killed our trade there. The tariffs of South American countries in many instances shut out our goods altogether. German competition is very keen and damaging in the Colonies. The Canadian preferential tariff has already nearly doubled our trade with that Colony, but against that our trade with Australian and African Colonies has fallen off very much lately. British West Indies is one of our best markets at present.

ELIJAH COTTON, NELSON POTTERY, HANLEY, STAFFS. ; Earthenware Manufacturer.

We formerly shipped in large quantities to Norway and Sweden, but have done nothing in recent years. Foreign competition in the Colonies is very severe, especially in South Africa and Australia.

THE FULHAM POTTERY & CHEAVIN FILTER CO., LTD., THE POTTERY, FULHAM, LONDON, S.W. ; Manufacturers of Stoneware Pottery.

The American tariff practically shuts out our goods from that country. We could do a considerable business with that country if the tariff were not so high. We do not know of any foreign competition in our class of goods in the Colonies or at home.

GRIMWADES, LTD., STOKE-ON-TRENT ; Earthenware Manufacturers.

Our export trade has not suffered by the operations of the tariff of any country. Our trade has increased in all markets, except U.S.A., which we do not cater for at all. Foreign competition in the Colonies was pretty keen on small wares till we produced similar lines by the best and latest methods, since which time we have been able to hold our own quite easily.

HENRY HULME & SONS, GARFIELD POTTERY, BURSLEM ; Earthenware Manufacturers.

A few years ago we did some trade with the U.S.A., but as we make a cheap class of goods we came in direct competition with their own manufacturers ; consequently to get in we had to sell at unremunerative prices, so we gave it up.

W. H. LOCKITT, WELLINGTON POTTERY, HANLEY ; Manufacturer of Earthenware Dinner, Tea and Toilet Sets.

I have lost many orders for tea ware in South Africa and Australia due to foreign competition, and the same also applies to cheap plates of all sizes.

MELLOB, TAYLOR & Co., BURSLEM, STAFFS. ; Earthenware Manufacturers.

Formerly (20 years ago) made all white ware for U.S.A. Now owing to tariff this trade has all gone. We then manufactured cheap printed dinner and tea ware, this trade has also practically left us for same reason. Goods can still be sold but at no profit so we dropped it. Sanitary earthenware.—This trade for America has also completely gone. Sanitary ware to Germany.—Owing to recent advance in duty we are afraid we shall lose greater part of this trade. Result, deed of assignment. U.S. practically control sanitary earthenware in Canada now. Our trade (general earthenware) has increased considerably with Canada since the introduction of preferential tariff, although German competition is very keen still.

FORM No. 13. Manufacturers of Common Stoneware.

It is possible that the U.S. tariff may have restricted our trade with that country, but it has not quite killed the trade, as we are doing business there even in the face of a 60 % duty, which the American importer has to pay on the goods bought from us.

POUNTNEY & Co., LTD., VICTORIA POTTERY, BRISTOL ; Manufacturers of General Earthenware.

We understand from our traveller on the Continent (who also carries high-class earthenware and china manufactured by some of the leading houses in Staffordshire) that his trade is falling off every year owing to the tariffs. We have not suffered directly by the operation of a tariff in foreign countries. We do no American trade (which is the principal foreign market for the earthenware). But indirectly we have suffered very considerably. A number of the largest firms in the Potteries confined their trade solely to America, but when the Dingley tariff came into operation the exports to America fell off very considerably, and these firms suffered greatly. The result has been that they have turned their attention to the home market, and all these firms are now actively pushing their goods in this market, which of course has meant extra competition and a fall in prices. They have practically made the home market a dumping ground for the surplus production which they could not send to America owing to the tariff. We have reports from our agents both in Australia and South Africa that the German and Belgian manufacturers are pushing the trade very hard, and delivering the goods free, at prices very much under what we can supply. We give extracts from representatives' reports received within the last few days, one from South Africa, the other from New Zealand.

"I am sending you a china cup and saucer by this mail for your inspection. I obtained it from Messrs. Kemp & Co., Oudtshoorn, South Africa, who buy them landed at their door for 2s. 8d. per dozen of 12 pairs, and I should like to know how you think this compares with your common sponged pattern which works out at 3s. 5½d. in Oudtshoorn."

The price of our cup and saucer at the works is, per dozen of 12, 1s. 7½d., costing at Oudtshoorn 3s. 5½d., leaving the cost of transit as 1s. 10d. per dozen of 12. We have no reason to doubt the accuracy of this, and we assume (with ground for doing so) that the cost to the foreign manufacturer to get his goods there is practically the same as our own. Therefore if this cup and saucer, white and gold, is delivered at Oudtshoorn at 2s. 8d., deduct from this cost of transit 1s. 10d., and it leaves the amount realised at the works 10d. per

dozen of 12, against our 1s. 7½d. This does not represent the cost even of materials and labour. We would remark that the comparison is for a foreign made gilded cup and saucer against our underglaze pattern, for which in the general market there is a difference in selling price of 7d. per dozen of 12 pairs.

Earthenware
—continued.

Our New Zealand agent reports:—"We send you by this mail a sample cup and saucer of a make that has been selling in this neighbourhood very well, and should like you if possible to get us out something like it; but it is only fair to say that no earthenware teas are now selling so well, as the foreign china can be landed at the same price now."

W. HERBERT WILLIAMS & CO., 72, NEWHALL STREET, BIRMINGHAM; Exporters of General Hardware, Earthenware, Chemical Ware, &c.

As a general rule we do not "import goods and send them abroad." Foreign goods purchased abroad are shipped from Antwerp, Hamburg, or other foreign ports, direct to South America, where most of our business lies. Foreign manufacturers have great advantages in special railway rates to their ports and in other ways. The value of foreign goods purchased by English merchants and shipped from foreign ports to their destination is increasing year by year, and will soon be a serious menace to English trade. Of course, the Board of Trade Returns do not take cognisance of this part of our trade. As to foreign traders injuring our trade by disposing of their goods in our markets at a lower price than they obtain for similar goods in their home markets, this is a common experience in our trade. In fact, an enormous number of articles is exported to our markets under these conditions, so that we have lost our trade in them altogether. With regard to goods imported by us from the U.S.A., every facility is given by our Custom House in connection with the importation of American goods. On the other hand, the U.S.A. Custom House put every difficulty in the way of our manufacturers introducing their goods into the States. To say nothing of the prohibitive duties exacted, they have a rigid and exorbitant system of consular invoices, and even small consignments by parcel post are rigidly scrutinised as regards marking, &c. Such a system, in view of the different treatment we give to U.S.A. manufacturers, is grossly unfair and calls loudly for retaliation. Within the last 20 years every foreign country we trade with has not only more than doubled the duties on manufactured goods shipped to their ports, but they have handicapped our trade considerably by demanding consular invoices and heavy fees for same. On the other hand, their products, either raw material or manufactured goods, find our ports open to them without restriction. As a consequence, many articles of manufacture we formerly shipped cannot be profitably exported.

T. RATHBONE, NEWFIELD POTTERY, TUNSTALL; Earthenware Manufacturer.

As we have not a large export trade it could not affect us much, only if the American and German tariffs were lower we could export to those countries. ⅔ of our trade at one time was done in the free towns of Germany, but when they were incorporated into the general Customs of the country our whole trade was gone. On a visit to Canada I found the German manufacturers were a long way in front of us, but chiefly in cheese stands, moustache cups and saucers, egg stands, sardines, jugs, cream jugs, fancy trays, vases and flower pots. This I attribute to the long hours and cheap labour.

W. WOOD & CO., ALBERT STREET, BURSLEM; Makers of China Castor Bowls, Earthenware Knobs and Handles used by Brassfounders, Japanners, &c., Biscuit Jars, Salad and Cruet Sets.

It would be a wise course if we could find out the quantity and value of sanitary ware, tiles, teapots and fancy goods sent to the Continent, British Colonies and America, separate from general household ware. The point is that the general household ware has declined very much—I mean by household ware, breakfast and tea ware, dinner and toilet ware, dessert and kitchen ware. Of course we know in 1902 there was over £300,000 less exported of all kinds of pottery than 10, 20, 30 years ago, but in the exports in 1902 sanitary ware, tiles, and largely flower pots and fancy goods, were included in the gross exports, whereas these latter are comparatively new branches of business, and if the amounts of these were found out and added to the £316,000 less sent in 1902, the decrease on the periods would be much greater than £316,000.

FORM No. 2,296. Manufacturers of all kinds of Earthenware.

We come into competition with Germany and Holland in selling to foreign countries, and they have the advantage in cheaper wages and longer hours of labour. Very often also they have a great advantage in cheaper rates of freight, both inland and across sea. Our export trade has suffered, especially with the U.S., where the duty runs up as high as 60% *ad valorem*. The consequence has been that numerous factories have been started in America, and many manufacturers here have gone out of business and their works are closed. It is singular that in spite of the high duty in the U.S. the demand for English earthenware has recently shown a distinct revival. The quality and general excellence of the Staffordshire earthenware has told its tale. Trades similar to ours have made inroads on our markets at times, especially in South America, where there is keen competition with German and Dutch goods, but we are able to hold our own fairly well, and if our Government were only alert enough to see that English goods were not discriminated against in the matter of valuation or classification for the purpose of assessing duties we should not have much to complain about. Our goods are all sold "delivered at the works," and we have nothing to do with payment of duties abroad, but undoubtedly the effect of raising the tariff in any country is to check the exportation of goods from this country, and to create a demand for an inferior class of goods. This remark applies more particularly to all countries outside of the U.S., where the circumstances are rather different.

FORMS NOS. 2,488 AND 5,181. Manufacturers of General Earthenware, Yellow Ware and Rockingham Teapots.

In regard to our export trade in general earthenware, we have not suffered directly. The way we suffer is this: when the American tariff was raised it drove the potters that worked for that market into the home trade, where we work, with the result that our orders diminished; then comes the cutting of prices in the home trade to see who shall have these diminished orders. We do not work for the American market, having seen that fluctuations upset business so much, being at one time so busy that you could work night and day, and then on the increase of the tariff you cannot keep your doors open. The yellow-ware trade began to suffer

from the duties put on after the American War of Secession, during the sixties. The Canadian trade remained to us for some years later and then snuffed out during the seventies. Of late we have had a few small enquiries from Canada, since the reduction in duties has taken place. At one time America and Canada took about half the entire make of the district. There were then 16 manufactories at work; there are now 5 only. We find that Dutch earthenware manufacturers have displaced our goods largely in India, Ceylon, Java and South Africa. They quote our prices but charge less for packages, and canal charges to put the goods on board ship are 6s., against ours by rail 17s. 6d. (Staffordshire 12s. 6d.). We think there is no competition in the Colonies from foreign makers of yellow earthenware. It is the German enamelled iron that has finished off what was a diminished trade through the heavy duties against it. We are bound to admit that the enamelled iron is lighter in weight and packs in less space and without any loss through breakage; for instance, in South Africa our stuff is eaten up with charges if taken up country in bullock waggons. The Dutch have captured the Ceylon and India trade for common painted earthenware for the natives, and also the South American trade to some extent. This has robbed us individually and pushed us almost entirely into the home trade.

FORM No. 2,994. Manufacturers of Fancy Earthenware Goods.

Our trade has suffered especially from the 60 % duty put on earthenware by America. We do practically nothing now with the States, and, along with many others in this business, have to depend on home trade alone, where there is so much competition and limited market, whereas the American trade used to keep us going (with four or five times the number of hands employed).

FORM No. 5,467. Manufacturers of Earthenware, Dinner, Tea and Toilet Ware, Glazed Tiles, &c.

Our export trade has suffered very severely, especially in the U.S.A. and Germany. The tariffs in these two countries are so high that they absolutely prohibit the sale of our products in these markets, except for very high-class goods, which the manufacturers in those countries are as yet not able to make of such good quality as ours. But each year they are getting nearer being able to produce even these, and in a few years' time will take no goods such as earthenware or tiles unless their tariffs are lowered. The cheaper class of earthenware and tiles, which 10 years ago used to be shipped to the U.S.A. and Germany in large quantities, is practically a dead letter in these markets, simply because they are making all they want themselves, protected by their high tariff walls against this country. We can compete successfully in Canada, in which country the tariffs against our goods are much lower than the U.S.A. or Germany, and where English goods get a preference of 33½ % over other countries.

FORM No. 10,363. Merchants dealing in Glass, Earthenware, China, Enamel Ware.

We export to all the Colonies and foreign countries other than European. Our foreign trade is increasing. 70 % of our trade is to British possessions, and is rapidly increasing. Large quantities of English glass, china and earthenware were sent to America, France, Russia, and Germany, but tariff effects have reduced them 60 %, and every year the total is decreasing, despite additional energy. A tariff encourages a manufacturer to spend money in experimenting and enlarging his works, and gives him the moral advantage of feeling himself secure. We have a wide circle of manufacturing friends, but very few are expanding; 90 % are not running works to full capacity. We only have to wait 2 weeks for goods from English works, but 2 to 6 months from Continental, because they are always full of orders from England. Our trade with Canada has grown, and several of our orders each week are marked "cancel if German make." South Africa and Australia, rather dull; West Indies, New Zealand, and India, gradually growing; Straits Settlements, growing rapidly.

NEW ZEALAND FARMERS' CO-OPERATIVE ASSOCIATION, LTD., 110, FENCHURCH STREET, LONDON, E.C.; Merchants.

The proportion of foreign-made goods to British-made is increasing slightly, chiefly in glass, earthenware, dress goods, wire and iron bars, and cutlery. The reason is the cheapness of the goods, the pushfulness of the German traveller, and cutting of prices.

FORM No. 10,499. Merchants of Earthenware.

German enamel-ware basins, bowls, plates, &c., are rapidly ousting British earthenware articles of the same character. Our exports of earthenware have dropped 60 % within the last three years. Enamel-ware is less liable to sustain damage than earthenware, either during transport, or when in use, and is lighter, and therefore more easily transported. British firms appear unable to compete with German enamel-ware makers.

TWYFORDS, LTD., CLIFFE VALE POTTERIES, HANLEY, STAFFS.; Earthenware Manufacturers.

Yes, in America, Canada and Austria. Practically lost Canadian market through American competition.

Sanitary Ware, &c.

THE NORTH BITCHBURN COAL CO., LTD., 129, VICTORIA ROAD, DARLINGTON; Makers of Sanitary Pipes, &c.

Yes; our export trade of sanitary goods to Germany has stopped entirely, owing to the hostile tariff of 10s. per ton put on these goods by that country some years ago. Our trade in sanitary goods to Norway, Denmark, and the Baltic has fallen off owing to increasing competition from Sweden, which country is able to undersell us owing to cheaper rate of wages and longer hours of work. We do not suffer from foreign competition in the Colonies.

SAMUEL OWEN, 38, SUN STREET, FINSBURY, LONDON, E.C.; Manufacturer of Sanitary Earthenware, Lavatory Basins, Drain and Soil Pipes.

Foreign competition is just as bad in the Colonies as at home. The Germans copy our manufacturers' products, but decrease the sizes and weight. The McKinley duty put on by the U.S. Government excludes all our manufactures and all table earthenware, and in consequence the makers of table earthenware, dinner, tea, coffee, &c., have since filled up the home market with sanitary goods, which they had not hitherto made, and consequently the prices through this competition fell 50 % and overflowed the home markets.

SANITARY POTTERY CO., LONGTON, STAFFS. ; Manufacturers of Sanitary Earthenware.

We believe our class of trade is suffering and will suffer on the Continent on account of their tariff, in two ways : firstly, duties help the makers over there to more easily get into and develop the trade, which is a comparatively new business, and secondly, the duties increase the cost of our goods to the buyers and thus prejudice their sale. We have tried quite hard to open up a trade with Canada, but so far everyone tells us there is no chance for our trade in that country ; the last writer in Canada said, " I do not see any chance for you in this country because the Americans dump the best sanitary ware here, and we make our own common ware." Since the above was written an English firm has commenced to make sanitary ware in Germany, and owing to duty and freight which is placed on English ware going into Germany, we are not now able to send our goods to that country, as the firms in Germany can sell at price less duty and freight, and thus undersell us very considerably.

GEORGE SKEY & CO., LTD., WILNECOTE WORKS, TAMWORTH ; Manufacturers of Sanitary Drain Pipes, Chimney Taps, Kitchen Sinks, Closet Pans, Fire Bricks and General Stoneware Pottery.

Our export trade in closet pans to America has suffered owing to the tariff. We do very little trade with the Colonies, so have not much experience of foreign competition there.

J. C. EDWARDS, TERRA COTTA WORKS, RUABON, NORTH WALES ; Manufacturer of Clay Goods, Bricks, Glazed Bricks, Sanitary Pipes, &c., Terra Cotta Flooring, Wall and Roofing Tiles.

My trade is practically a home trade, most of the foreign trade we do going to our own Colonies. We experience no foreign competition in our home trade. The American tariff is the only one that affects us at all, and only to a small extent.

THOS. WRAGG & SONS, LTD., SWADLINCOTE, DERBYSHIRE ; Manufacturers of Stoneware Sewerage Pipes, Fire Bricks and Fire-clay Goods.

Our export trade to France and Germany has suffered. We used to do a considerable trade to French ports, Havre, Boulogne, &c., but owing to the import duties we lost it some years ago. We have a considerable trade for sewerage pipes with South Africa, but we have been cut out in one or two instances through pipes being sent from Belgium, where we suppose the hours of work are longer and the wages less than here. In regard to the French trade we do not know at the moment what the tariff is. Having lost the trade, we have not troubled to enquire of late years. In fact, they now insist on having French pipes.

FORM No. 4,675. Manufacturers of Sanitary Earthenware.

We were doing a large export trade to Germany until the new tariff there was enforced, sending three-fourths of our output there. The new duties killed the whole of it, and we have only just succeeded in regaining a small portion of that trade. In Germany two large English firms have already established works, to meet the increasing competition from German works, which have been established since the increased tariff came into force. It is absurd to attempt to do business with the U.S.A. now, and we have no intention of doing so. Belgium is still a good customer. No home factories yet. France is a decadent market, owing to increasing home production.

FORM No. 5,001. Manufacturers of Crucibles.

Foreign competition in the Colonies is already very keen, and there is every indication that it will increase in severity. We find little tendency to favour British manufactures over foreign, even in State Departments. In U.S.A. the tariff is prohibitive on certain classes of our goods, and severely protective on the others. In France also a highly protective tariff prevails and a protective tendency is apparent in the customs' tariffs of all Continental countries, which cannot fail to increase our difficulties. The protective tendency is also apparent in Colonial customs' tariffs where local manufacture is usually considered as entitled to protection.

HARRIS & PEARSON, FIRE BRICK WORKS, STOURBRIDGE ; Manufacturers of Fire Bricks, Gas Retorts, &c.

Our export trade has suffered of late years, but as we usually supply through British merchants we are not personally acquainted with the tariffs of other countries. Our trade with the U.S., Germany, France, Russia, is practically gone. The merchants on this side, through whom our Colonial trade is chiefly done, tell us that the competition of other countries has knocked us out of most markets.

FORM No. 5,179. Glazed Brick Manufacturers.

From 10 to 20 years ago a few glazed bricks were exported to America, in spite of the tariff. Recently, they have begun to manufacture themselves. The brick trade must of necessity be more or less local on account of the weight, and clay being pretty generally distributed. Glazed bricks are, perhaps, more uncommon, but it is hardly to be expected that foreign countries will not make for themselves and save high freights, to say nothing of tariffs.

J. H. BROUGH & CO., 40, CANNING PLACE, LIVERPOOL ; Manufacturers and Dealers in Bath Bricks, Salt, Whiting, and Pipe-clay Merchants.

The U.S. have of late years entirely shut us out from their market as regards salt in packages and whiting, and nearly so as regards bath bricks. Twenty years ago we had a considerable trade with that country, now it has almost ceased to exist. The tariff walls have been gradually but surely raised against us in most or all foreign countries, with the result that our trade has been very much handicapped (to the advantage of the foreign manufacturers) and has naturally seriously declined. The tendency of foreign Customs' regulations and tariffs is to foster the foreign home factories who are producing similar lines to ours at more than our c.i.f. prices—gradually

but surely increasing such regulations and duties until we must of necessity give up the competition and the trade. Upon even terms we have no reason to fear foreign competition in the trade with our Colonies, and as far as we know such conditions now exist.

HENRY ALTY, HESKETH BANK, PRESTON; Brick and Tile Manufacturer and Building Material Merchant.

Belgian cement has made inroads into markets hitherto largely supplied from the U.K. I manufacture principally common building bricks, and these are not imported.

CALDER FIRE CLAY CO., COATBRIDGE, N.B.; Manufacturers of Fire Clay and Bricks.

The only information we have is that the U.S. can export to Canada cheaper than ourselves. The reason however is obvious. The only country we know of that has put a tariff on our manufactures is the Argentine Republic, but we export largely there.

CAPOEN & Co., LTD., 2B, PANCRAS ROAD, LONDON, N.W.; Brickmakers.

We carry on a brickmaking business at Cape Town, using about 200 tons per month of Scotch coal, on which we pay an import duty of 3s. per 2,000 lbs. The Colonial Government admit bricks free of duty to compete with us. We spent £15,000 in Cape Town to put down a first-class plant, but the cost of white labour, caused largely by the excessive import duties on food and clothing, has continually hampered us and we would have lost our money so far as trading is concerned. The land on which the yard is worked has increased in value and will save our capital. So far as Cape Colony is concerned at least, I consider the import duties will make it difficult for Englishmen to establish themselves there as a working class.

THE CASTLE FIRE BRICK CO., LTD., NORTHOP, R.S.O. FLINTSHIRE; Manufacturers of Fire Bricks, &c.

Our export trade to the U.S. has suffered. Years ago we used to ship some 200,000 bricks a year to the States; now our trade there is practically nothing.

WALWYN T. CHAPMAN, CLEETHORPES, GRIMSBY; Terra Cotta Manufacturer.

In regard to export trade, business has doubled during the last twenty years.

FORM No. 1,935. Fire Clay Manufacturers. 7

Previous to the introduction of the McKinley tariff we were able to send certain classes of goods into the U.S.A., but we cannot do so now.

CHARLES DAVISON & Co., EWLOE, NEAR CHESTER; Manufacturers of Fire Bricks and Fire Clay Goods, &c.

1. We used to send annually many hundreds of thousands of fire bricks, and many thousands of ridge tiles into the U.S. at a very good profit. Now, owing to the Dingley tariff, and, secondly, even more to the McKinley tariff, our exports have been very seriously reduced, and the profits reduced to a vanishing point. At times in order to keep our connection we have had to send the bricks in at an actual loss, *i.e.* 4s. to 6s. per 1,000 under what they cost us to make. The duty on bricks is \$1.25 per ton (=16s. 6d. per 1,000 bricks), while that on ridge tiles is 5½ cents per tile, or equal to 125% *ad valorem*. As the tiles sell for about 11 cents in U.S.A. the duty is equal to cost, freight and insurance put together. It is only superior quality that keeps us any trade. 2. We used to send many cargoes of 12-in. flooring tiles and blocks for lining limekilns, acid-proof bricks for lining Glover towers and fire-clay goods of various descriptions to France. Since the tariff was raised we barely send a cargo or two a year, and that at starvation prices. 3. The same applies to Denmark and other countries.

C. O. FISON, LTD., STOWMARKET; Brick and Tile Makers.

We manufacture mostly for the home market, but we send a few malt-kiln tiles to Belgium and New Zealand. What little export trade we do is done direct.

THE GLENBOIG UNION FIRE CLAY CO. LTD., 48, WEST REGENT STREET, GLASGOW; Manufacturers.

During the last 40 years we have shipped largely to Russia, Germany, France, Belgium, Switzerland, also to Italy, Spain, Holland, Denmark and Norway, but during the last 10 years or so our trade with Continental countries has been much reduced, especially to Northern Russia; with Southern Russia we still do a large business. In Russia we have great competition from Sweden. Their products are cheaper, no doubt from causes named above (wages, hours of labour, &c.), but so much depends upon quality in fire bricks, that cheap goods of inferior quality cannot displace the superior article. They can only reduce the use of the best by confining it to the hottest parts of the furnace and using the cheap article in less important parts. To Northern Russia we used to send several million fire bricks annually; for some years past the quantity has been diminishing, and last year we sent none at all. The same has been our experience in all the Continental countries, but to a less extent. We ascribe this principally to tariff obstruction. Twenty or more years ago we had a good trade with the U.S., now we have none, entirely because of the adverse tariff. Our Colonial trade remains good and is gradually increasing. As to foreign competition in the Colonies we have no reliable information. Our impression is that in consequence of the excellence of our manufactures we are not subjected to foreign competition in the Colonies.

GREGORY, REDDISH & Co., LTD., 26, GEORGE STREET, SHEFFIELD; Fire Brick Manufacturers.

In some markets for our goods, such as Russia, Sweden, Japan, &c., the cheap labour of Germany, and in some cases preferential tariffs with Germany, kept out our goods. Our exports to Russia and Sweden are decreasing. U.S.A. has taken the bulk of the Colonial trade in fire bricks for Canada, and in British Columbia, We are in a position to compete for the business were the preference substantial.

JOHN HALL & SON, THE FIRE CLAY WORKS, DUKINFIELD; Manufacturers of Fire Bricks, &c.

We have not suffered from any such foreign tariff. It is the purchasers in those countries who pay the tariff.

Bricks, &c.
—continued.

HAMBLET'S BLUE BRICK CO., LTD., PIERCY BLUE BRICK, TILE AND PIPE WORKS, WEST BROMWICH, STAFFS.; Blue Brick Manufacturers.

We do a large home trade in blue bricks and also a little with Germany, South Africa and the U.S. The tariff to Germany is 5%, but we believe the tariff to the U.S. is very high and we are of opinion that we could do a much larger trade if the tariff were reduced, our present rate to New York by land and water being only equal to our railway rate to towns in the southern counties of England.

HATHERN STATION BRICK AND TERRA COTTA Co. LTD., NEAR LOUGHBOROUGH, LEICESTERSHIRE.

Our manufactures are produced in France, Germany, Italy, Spain and America. We cannot compete in European countries because of their lower wages and cost of freight. In America there is of course no chance of competition.

THOMAS LAWRENCE & SONS, BRACKNELL, BERKS.; Manufacturers of Red Facing Bricks, &c.

These goods are too heavy for much trade to be done over sea. Last year we sent about 300 tons to Cape Town.

LUCAS BROTHERS, LTD., DUNSTON, GATESHEAD-ON-TYNE; Manufacturers of Fire Bricks, &c.

The trade in fire bricks between the Tyne and America, Germany, Holland, Belgium and Russia used to be enormous. Year by year it grows less; the English quality being far superior to the quality manufactured in any of these countries, the reason for the decreased exports can be traced to nothing else but the heavy tariffs they impose. Fire bricks are very largely used in works where a brick is required to resist heat, such as iron works, glass works, chemical works, gas works, &c. It can easily be seen that with the development of our Colonies larger quantities will be required every year, hence preferential treatment extended us by our Colonies would be of inestimable value.

FORM No. 2,060. Manufacturers of Fire-clay Gas Retorts, Fire Bricks, Enamelled Bricks, &c.

Our export trade with the U.S. has suffered. We do so little trade in the Colonies that our experience would be of no use. Owing to heavy cost of transport we could not successfully compete in other countries with local manufacturers even if the tariff were taken off.

THOS. W. ROOME, MEADOW WORKS, RAWMARSH, NEAR ROTHERHAM; Manufacturer of Fire Bricks, &c.

My sales are all for the home markets, but I believe my customers for stove backs send them fitted into foreign and Colonial markets.

SILICA FIRE BRICK Co., OUGHTIBRIDGE; Manufacturers of Silica, Magnesite, Ganister and Fire-clay Bricks.

We do only a small Colonial trade, as the demand is only small. We could do some trade in Canada, but the U.S. beats us at present. Some 10 to 15 years since half our trade was exporting Silica bricks to Germany, but as the tariff has been gradually raised against us we have gradually lost the trade, until now it is almost nil.

TIMMIS & Co., STOURBRIDGE; Manufacturers of Fire Bricks, Fire-clay Retorts and other Fire-clay Goods.

Nearly all our foreign trade has gone and our Indian and Colonial trade is much less than it used to be. If the existing duties were on the value of our goods at works only we could compete, but the carriage and freight to America and many parts of the Continent is as much as the value of the goods at works, and where an *ad valorem* duty is levied, say of 30%, it becomes 60% on our goods here. Canada buys almost entirely from the U.S. for the reason given above. India and the other Colonies order their goods largely through London, but notwithstanding that a quantity of Continental goods are put on their markets.

WOOD & IVERY, LTD., WEST BROMWICH, STAFFS.; Blue Brick and Tile Manufacturers.

Our export trade has not suffered through the operation of any tariff, owing to the fact that we make an article that can only be produced in Staffordshire.

FORM No. 2,319. Manufacturers of Silica Bricks and Cement for Steel, Glass, Copper, and Gas Furnaces.

A large business has been done in Europe, but Germans have supplied themselves for many years. A very large trade in silica bricks has been done with Russia until quite recently, but now they make all their own, we believe since their latest tariff. We have no knowledge of the prices charged for our class of goods in tariff-protected countries, or of the tariffs that have been put on, except in France, where we still supply one glass works owned by an English firm who have a branch works in France. The duty we have to pay is a little over 10% on the cost price here.

Nine other firms of manufacturers of silica bricks, fire bricks, &c., give general confirmatory evidence of the restrictive effect of the tariffs of the United States and Continental countries.

CRAVEN, DUNNILL & Co., JACKFIELD, SHROPSHIRE; Manufacturers of Tiles.

Tiles

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Our export trade to France has ceased, to Germany is nearly extinguished, to America was satisfactory before the Dingley and McKinley tariffs were introduced. We then exported all kinds of tiles, cheap floor tiles to the more expensive encaustic and painted. Now we export only certain specialities that are considered artistic by rich Americans and certain other tiles which at present American makers do not produce. As the duty rose in America we met it by reduction in our price, having always had to reduce our price to meet the pre-Dingley duties, till at last a point was reached with the duties that we could not meet with a further reduction of our price, unless we had sold at a loss. Germany has made inroads into Portugal, Denmark, Sweden and Norway with wall tiles and floor tiles; the U.S. into Australasia with coloured enamels; Belgium and Holland into home, U.S., Argentine Republic, Portugal, with wall tiles and coloured enamel tiles; the U.S. into its own markets, and into Canada with all sorts. The proof of the above statements cannot be further particularised than from the remarks in letters from our correspondents, who tell us we are cut out in price, after reducing our own, by foreign makers. Before the duty in the U.S. was so high as it is now we did a very large business there. Now we do very little. We have been told by our friends in Australia and Canada that the Dutch white wall tiles undersell ours. There was then no preference given by these Colonies in the way of reduced duties on goods of English make. In Canada we have begun to do more business since the preferential rates have been in force. We have been told by our friends in Australia and New Zealand that the American enamel coloured tiles undersell ours. There was then no preference given by these Colonies.

A. GODWIN, LTD., TILE WORKS, LECKHAMPTON, CHELTENHAM; Tile Manufacturers.

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A good trade was formerly done with the U.S. in enamelled tiles. The McKinley tariff however quite upset the trade. Tiles are now being manufactured in the States.

FORM No. 3,610. Manufacturers of Glazed and Enamelled Hall Tiles, &c.

Our export trade has suffered considerably by reason of the protective tariffs of the U.S.A. In considering this point and in reference to what is stated below in regard to our Colonial trade, there is no doubt that in recent years the U.S.A. have made great progress in the efficient and economical production of goods of the class we manufacture, but still with a reasonable tariff our exports there would undoubtedly considerably increase. We experience severe competition in the Colonies from the U.S., Germany and France, similar goods to ours being offered in many cases at prices below what our cost price would be under the most favourable circumstances possible. The above competition refers also to a marked extent to India.

SOMERSET TRADING Co., LTD., BRIDGWATER; Manufacturers of Roofing Tiles, Bricks, Drain Pipes, &c.

There used to be a considerable trade years ago, Bridgwater to northern French ports, in roofing tiles. This has died out, but we still ship to Jersey and Guernsey.

WHEATLY & Co., SPRINGFIELD TILERIES, NEWCASTLE, STAFFS; Manufacturers of Flooring Tiles, &c.

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Tariff killed a possible export trade to the U.S. 25 years ago. Now they supply themselves.

GEORGE WOOLLISCROFT & SON, LTD., HANLEY, STAFFS; Manufacturers of Floor and Wall Tiles, &c.

America is now selling in Australia and New Zealand, which is a new feature, and no doubt they are or soon will be doing the same in South Africa. Our trade has suffered by the high tariff of America, where we did a fair business years ago, but now they make all their own requirements. In Canada, Australia, South Africa and New Zealand, American, German and French manufacturers now compete against us by reason of their cheap labour and facilities of transport.

FORM No. 1,905. Manufacturers of Bricks, Tiles, Draining Pipes, Ridge Tiles, Bath Bricks, &c.

Not much competition with foreign imports at home but rather severe competition as regards roofing tiles in the Colonial markets, especially in India and South Africa. We have information that in Germany hours of labour are more and wages less than in England as regards brick works and kindred trades. The decay of sugar production in the West Indies closed our export trade there. Exports to France of roofing tiles have ceased, presumably because French clay-workers have to a considerable extent adopted English methods of manufacture. A few years since there were fairly large exports of "malt kiln" tiles to Holland. These have also become almost a thing of the past. The export of bath scouring bricks has not suffered from competition by foreigners inasmuch as these goods are made only at Bridgwater, and Bridgwater supplies the world; probably import duties in France, Germany and the United States of America restrict their use in those countries. In the U.S. these goods are subject to a duty of 10%. It may also be stated that a British firm in New York, taking large quantities of bricks in wood boxes, send to Bridgwater all the wood for the boxes cut to a suitable size. The strips are nailed together in England and the boxes so formed are then packed with bricks. This arrangement for making boxes enables the New York firm to avoid the heavy American duty that would be chargeable on English-made boxes of English or other than American timber, which we are informed is prohibitive.

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We have information that French roofing tiles are chiefly used in parts of India. Also in some parts of Australia. French tiles are also competitive in South Africa, rather seriously, in reference to which we are in correspondence with firms of importers at Cape Town. Some cargoes of patent roofing tiles have been sent by instructions from the Agent-General of the Cape to this company, whose speciality they are, and it is hoped there may be no obstacles to further exports in the same direction.

FORM No. 1,965. Manufacturers of Encaustic Tiles and Mosaic Tiles, Sanitary Earthenware, &c.

Our export trade to the U.S.A. and Germany has suffered by the tariffs in each of these countries, and we find that in Australia, where we once had a very good market, goods are now being supplied at a rate at which we cannot compete. In Australia we find flooring tiles are shipped from America below ordinary cost price,

We have lost export trade, chiefly with America. Before the McKinley tariff was introduced our trade with the U.S.A. amounted to £11,000 per annum ; it has since dwindled down until it is now absolutely nil.

Tiles

—continued.

Employment

(E) EMPLOYMENT.

QUESTIONS 14, 15, 16 AND 17 (FORM VII.) ; AND QUESTION 10 (FORM VIII.) :—Have you any knowledge indicating that the exportation of textile machinery to any country has been followed by (a) an emigration of skilled labour to work such machinery, (b) the diminution of your exports to that country ? To what extent has there been any alteration in the grade of labour employed in your industry ? Please give reasons for any such change. To what causes do you attribute the change, if any, in the export to foreign markets of fully-manufactured articles in your trade ? What has been the effect of foreign tariffs in diverting employment in your industry from the production of fully-manufactured to semi-manufactured commodities, or vice versa ? Please give particulars. Taking 1903 as an example, can you give any particulars and figures as to the loss of employment in your establishment due to the importation of goods you could have manufactured ?

C 737. Common China Manufacturer.

A statement showing the estimated loss to the two towns of Fenton and Longton by the importation of foreign china, also shows that the loss does not fall upon the china trade alone, but that other trades are seriously affected. The imports of foreign china amount to over half a million pounds' worth per annum. Owing to this being bought from abroad instead of being made in this country, working potters lose in wages £250,000 per annum, or £5,000 per week ; potters' millers lose the grinding of 5,500 tons bone, 3,500 tons stone, 750 tons flint, and 3,000 charges of glaze ; coal owners lose the sale of 75,000 tons of fuel, and coal miners lose £20,000 per annum in wages, or £400 per week ; bricklayers lose £2,500 per annum in wages, for repairs alone ; fire-brick makers lose the sale of 1,000,000 bricks, irrespective of kiln, quarries, and sundries ; marl owners lose the sale of 20,000 tons of marl, &c. ; crate makers lose the sale of 7,000 crates, and the cask makers lose the sale of 3,000 casks ; blacksmiths lose £1,500 per annum for repairs only, carpenters lose the same amount ; retail trades must follow with a loss of at least £5,000 per week. 70 % of the total loss falls directly upon the work-people, who lose in wages £7,000 per week : is it any wonder that the two towns feel the pinch of poverty under such a system ? On our present output the establishment expenses, including everything except cost of materials and wages to producers, amount to over 30 % of our turnover. Our production during the last five years has only been one-half what the factory is capable of. Half our machinery is idle, and we are working with half a producing staff. Were our factory fully employed, our establishment expenses would not be increased by more than 10 %, and our production would be doubled. This would enable us to reduce selling prices by 10 %, and would still leave us with increased profits. These facts are based on actual figures taken from the factory books.

E. BRAIN & Co., FOLEY CHINA WORKS, FENTON, STAFFS. ; General China Manufacturers.

Average loss of employment is 33½ %.

E. HUGHES & Co., OPAL WORKS, FENTON, STAFFS. ; Manufacturers of China Ware.

In 1903 we produced less than 60 % of our total capacity. A duty of 25 % would bring us all the trade we could do.

RIDGWAYS, BEDFORD WORKS, STOKE-ON-TRENT ; China Manufacturers.

Earthenware candlesticks, small jugs, teapots, sardines, triple trays, divided cover dishes, egg-cups, egg baskets, toilet trays, small vases, figures and other articles too numerous to mention have been replaced by German china articles dumped down in this market below cost, both as regards production and carriage, with the result that many pottery artisans are thrown out of employment. An earthenware teapot for which I want 8s. a doz., and for which I give 2s. 6d. a doz. to my hollow-ware presser for making, is sold in London in German china at 3s. a doz., carriage and packing free.

TAYLOR & KENT, FLORENCE WORKS, LONGTON, STAFFS. ; Manufacturers of China Ware.

Loss of about ⅓ of our normal employment.

G. WARRILOW & SONS, QUEEN'S POTTERY, LONGTON ; Manufacturers of China Tea and Breakfast Sets, and General and Fancy Goods.

Owing to state of trade we were unable to find full time employment for our people last year.

FORM No. 2,786. Manufacturer of General China.

Speaking for ourselves we have been fully employed, but we make a good class of china at a moderate rate. In the ordinary every day china, such as white and gold and Irish teas, &c., the Germans are making similar goods to Longton china at ruinous prices, also very large quantities of goods for sea-side sales with which we cannot possibly compete.

FORM No. 2,993. Manufacturer of General China Tea and Breakfast Ware.

My premises will produce £25,000 per annum in china ware easily. In 1903 I only did £16,000. Half of the sale value of my product is paid directly in wages to my own employees (besides a good proportion of sale value being paid for labour indirectly), hence the loss of employment amounted in my case in 1903 to £4,500. I think we, *i.e.*, the trade, could manufacture the whole of imported goods with a reasonable import duty. The average employment during 1903 was less than 4 days per week.

FORM No. 3,128. Manufacturers of General Tea and Breakfast China, and Fancy Articles.

Wages paid in 1875, £5,043; in 1903, £3,307.

ANCHOR PORCELAIN COMPANY, LONGTON; Manufacturers of General China, Tea and Breakfast Sets, and some Fancy Articles.

We have had sufficient proof that we should have done considerably more trade had we not been subjected to the unfair competition of imported goods.

FORM No. 4,119. Manufacturers of General China.

Wages paid by us in 1903 was £2,940, which should have been at least £4,000. They will be much less this year. Wages in the building trade of this district have since the year 1861 increased from 4d. to 8d. per hour. The potters' wages (all piece work) have not, on an average, made any advance during the last 60 years, and also are now being reduced.

FORM No. 2,462. Fire Clay and Fire Brick Manufacturers.

The foreign manufacturers of fire clay goods are very keen to capture contracts, and we know in one case a contract was taken by them and they not only supplied the fire bricks, but sent their own men over to lay the bricks, thereby depriving the British workman of his labour.

CLAY PIPE FINISHERS' ASSOCIATION OF MANCHESTER.

At the end of 1903 we had 94 members in Manchester and Newcastle-on-Tyne. There are seldom any out of employment. 58 hours are worked for a full week. In 1903 our members worked 8 weeks for 7 hours a day and 5½ hours on Saturday. In Newcastle-on-Tyne some of our members worked 1 or 2 weeks and played a week. The importation of foreign-made goods into British markets has not affected the conditions of employment in our trade, nor have we any foreigners employed here. We have had 2 or 3 girls that have left our trade through slackness, but they will come back when trade gets better as we are a small trade and are not overrun with finishers.

OPERATIVE POTTERY ENGRAVERS' TRADE UNION, 169, NEWPORT LANE, BURSLEM.

This Society was inaugurated 3 years ago. The average of unemployment has been 3 weeks per member per annum for 1901 and 1902. In 1903 it had dropped to 2 weeks. This trade is to a large extent a season trade, our periods of slackness being in the spring, at which time of the year some men will have about 6 weeks' idleness, and then go on full time again. It seldom occurs we are put on 4 or 3 days a week as in most trades, it usually runs full time or nothing. Some 6 years ago a new method of decoration was introduced, lithographic ceramic transfers. This process, not on account of cheaper production, but on its own merits as being a more effective and artistic method, superseded one class of our own trade, and has contributed in a large degree to the lack of employment. These transfers are manufactured in our own district, the majority of the artists being English, with a few French and German. Foreign-made goods do, of course, compete with our home productions, but this, in my opinion, is not the cause of our members going abroad or leaving the trade. Since March 1901, of our own members 6 have gone abroad and about 10 others who were not members also. The country they have emigrated to is America. The reason—higher wages, amounting in most cases to 100% and in others as high as 150 and 200. As near as I can tell, 20 journeymen and apprentices have left the trade during recent years for other occupations. Many of them were inefficient workmen and have undertaken various agencies: insurance, &c. I may say here that owing no doubt to the number who have gone abroad and left the trade, employment amongst us has been better the last 12 months than for some years previous.

SAMPSON SMITH, LONGTON, STAFFS.; China Manufacturer.

I attribute the decrease solely to importation of German and French china.

FORMS NOS. 2,488 AND 5,181. Manufacturers of General Earthenware, Yellow Ware and Rockingham Teapots.

I should like to point out that the common yellow earthenware trade is carried on in mining villages and finds employment for women as well as men. From the point of view of encouraging trades that can be carried on away from large towns it is a great pity that 75% of the works have had to shut up, or lose money. The only point I wish to enforce is that we can get a profit on our goods if we can work full time. The loss of employment is due to the heavy income tax and other taxation which reduces the spending power of the middle class people, and one of the first things to suffer is earthenware. Food and raiment come first and must be had, but people can put off buying a new dinner set or toilet set during bad times. During the coronation year we worked nearly full time for the first time for 25 years.

(F) DIFFERENTIAL RAILWAY AND SHIPPING RATES.

QUESTION 11 (FORM VII.) :—Please give any information you have showing the effect on your trade of the action of foreign countries in differentiating railway rates and shipping charges on goods exported to the United Kingdom, or other countries.

WM. ADAMS & CO., TUNSTALL, STAFFS. ; Earthenware Manufacturers.

Foreigners have an advantage in the rate paid for wages, the hours of labour and the inland carriage to port of shipment ; also the exclusive railway and canal charges on other materials. We give one illustration to show how unfairly we are treated : the carriage alongside ship in London is 25s. per ton for 150 miles, and the like carriage to Liverpool—50 miles—is 15s. 6d. per ton, *pro rata*, to the latter port which only ought to be 8s. 4d. per ton. Bear in mind that Liverpool is our nearest port for shipment of goods.

FORMS NOS. 2,488 AND 5,181. Manufacturers of General Earthenware, Yellow Ware and Rockingham Teapots.

The shipping companies charge extra for British goods compared to Dutch, 5s. per ton measurement for Java.

298 FORM NO. 10,096. Merchants dealing in China, General Fancy Goods, Clocks, Watches.

The rates are favourable to the foreign manufacturer. It is possible for, say the Germans, to get a parcel of goods through from Germany to any inland town in Great Britain at a less cost than a parcel would be charged say from Sheffield to Bristol or London.

FORM NO. 10,363. Merchants dealing in Glass, Earthenware, China, Enamel Ware.

The low rate from inland works to shipping ports is a great help to Continental makers. The dock charges are low and freight for sea carriage the same as here. The high railway rates in England often cause us to send orders abroad.

NOEL BROS. & CO., LTD., PRUDENTIAL BUILDINGS, CARDIFF, WORKS AT LLANTRISANT AND TONDU ; Manufacturers of Sanitary Pipes, Fire Bricks, Chimney Pots, &c.

Our export trade has suffered by reason of the German subsidies to steamship lines which carry German produce to foreign markets in which we trade, especially Argentine and Brazil.

NEW PETERBOROUGH BRICK CO., LTD., PETERBOROUGH ; Brickmakers.

We have been offered an export trade to South Africa but this was prevented by the ocean freight, the dock dues and landing charges in that colony. Cost of transport would prevent us doing a foreign trade with most countries. The action of the dock company or other authority in charge of the landing of goods at Cape Town prevents any trade being done.

299 SAXON BRICK CO., LTD., PETERBOROUGH ; Brickmakers.

Cost of transport would prevent us doing a foreign trade with most countries. We have been offered an export trade to South Africa, but this was prevented by the ocean freight, the dock dues and landing charges in that colony.

FORM NO. 4,678. Brick Manufacturers.

Railway rates are so heavy that they prevent our doing any other than local trade.

Remedial Measures

(G) REMEDIAL MEASURES AND EFFECT AND INCIDENCE OF IMPORT DUTIES.

QUESTIONS 8, 9 AND 11 (FORM VIII.) :—What minimum duties, if any, on the articles imported, similar to those you manufacture, do you suggest as sufficient to safeguard the interests of your trade? If such duties were imposed what, in your opinion, would be the effect (a) upon prices in the home market, (b) in securing greater continuity and security in the home trade, (c) in reducing cost of production, (d) in increasing employment, and (e) in increasing wages? Do you think that, in the interests of your trade, special measures are required to prevent the importation of foreign manufactures below cost price in the country of origin?

300 China FORM NO. 2,786. Manufacturer of General China.

5 % duty would affect the German trade to such an extent that we should get orders enough to keep our works going with articles now made by the Germans, but which are nothing like the value of our goods. A high duty would be ruinous to our trade. The Germans have their dumping arrangements to such a nicety that even a 2½ % duty would affect them greatly. We should not get any more for our goods. The present prices would pay us if we could get more business, and 2½ or 5 % duty would make a big difference to those who buy foreign china. Our workpeople are well paid and well satisfied with present wages.

RIDGWAYS, BEDFORD WORKS, STOKE-ON-TRENT ; China Manufacturers.

10 to 15 % *ad valorem* on earthenware, as per classification in Trade and Navigation Returns, provided there is a stringent dumping clause, directed against both production below cost and carriage both of materials and finished goods below cost. (a) Prices would at first have a slight tendency to rise until checked by increased competition among British manufacturers and the desire among our foreign competitors to take less profit rather than lose British trade. (b) Greater continuity and security in the home trade would follow, particularly

if the clauses to check dumping are strictly enforced. (c) Cost of production would be reduced by the security that improvements in manufacture would meet with an adequate return. (d) Increased employment would undoubtedly follow any increased security given to the home trade. (e) An increased rate of wages would undoubtedly follow increased employment. Certainly special measures are required to prevent the importation of foreign manufactures below cost price in the country of origin. This is the cause of the whole question so far as our own pottery industry is concerned. We would suggest that the measures adopted should follow very much the lines of the Dingley Act in the United States, but should also throw upon the importer the onus of showing the market price of his goods in the country of origin. The want of all reliable particulars relating to the home trade in this and other important industries seems to us a matter which should engage the attention of the Commission; the proportion which foreign imports bear to home productions cannot be estimated in the absence of reliable figures relating to the latter.

SAMPSON SMITH, LONGTON, STAFFORDSHIRE; China Manufacturer.

China 25 %. Selling prices would not be increased, and would ensure greater continuity and security in the home trade, and expenses decreased by a large turnover, &c. A system is required to see that goods are invoiced correctly as to grade, quality, price, &c.

E. BRAIN & CO., FOLEY CHINA WORKS, FENTON, STAFFS.; General China Manufacturers.

We suggest a duty of 25 % at least on all china tea and breakfast ware and art ware. (a) Prices ought to go up 5 to 10 %. (b) Home trade would improve. (c) Cost of production would be the same, but workpeople would have more work and wages. The special remedial measure required is a protective duty.

HERBERT J. COLCLOUGH, GODDARD STREET, LONGTON, STAFFS.; Manufacturer of General China, chiefly Tea and Breakfast Ware.

25 % on china ware of all descriptions. (a) Will not increase selling prices. (b) Will ensure greater security and continuity in the home trade. (c) Resulting from decrease in dead expenses consequent on larger turnover. (d) By exclusion of large amount of foreign imports full time would be general. (e) Consequent on fuller employment. The American system of appointing appraisers or assessors to ensure that goods are invoiced correctly as to grade, quality and price, should be adopted.

E. HUGHES & CO., OPAL CHINA WORKS, FENTON, STAFFS.; Manufacturers of China Ware.

25 % *ad val.* on all imported china. Prices of English china would not advance generally, but there would not be the undercurrent which now exists to take special orders at cut rates. There would be more regular employment. This would considerably reduce the cost of production. Wages would undoubtedly increase. We think that all foreign china should be stamped with the name of the country of origin. As the stamp is put on during the process of manufacture, and cannot well be added after completion, this would prevent the dumping of surplus warehouse stocks on our market.

TAYLOR & KENT, FLORENCE WORKS, LONGTON, STAFFS.; Manufacturers of China Ware.

We suggest a 25 % duty on common china and small ornamental ware. (a) No increase in prices would be necessary. (b) It would secure greater continuity and security in the home trade. (c) Owing to being employed full time, the reduction in dead expenses would amount to a profit in themselves. (d) and (e) Owing to increased employment the wages must of a necessity be greater. The special measures required are a 25 % duty put on, and assessors appointed at ports of entry to see that goods are of same quality as invoiced, and in case of any breach goods to be confiscated.

FORM No. 3,128. Manufacturers of General Tea and Breakfast China and Fancy Articles.

We suggest a 25 % duty on china ware of all sorts. (a) Prices in the home trade would not be increased. (b) There would be greater continuity and security in the home trade. (c) Cost of production would be reduced from the decrease in dead expenses consequent on larger turnover. (d) Increased employment would be attained by foreign imports being excluded; English goods would then be more in demand. (e) Consequent on fuller employment, wages would be increased. We think that the American system of appointing an appraiser or assessor to ensure that goods are invoiced correctly as to grade, quality and price, should be adopted.

FORM No. 6,574. Manufacturers of Tea and Breakfast Sets, Fancy Goods, and General China.

25 % on china ware of all descriptions. (a) Will not increase selling prices. (b) Will ensure greater continuity and security in the home trade. (c) This would result from the decrease in dead expenses consequent upon larger turnover. (d) Attained by the exclusion of foreign imports largely, full time would be general. (e) Consequent on fuller employment. In order to prevent the importation of foreign manufactures below cost price in the country of origin, the American system of appointing an appraiser or assessor to ensure that goods are invoiced correctly as to grade, quality and price, should be adopted.

EDWARDS & BROWN, HIGH STREET, LONGTON; Manufacturers of General China.

All descriptions of china clay (not earthenware) 30 per cent. (a) Not necessarily increased. (b) Would certainly ensure this object. (c) Would secure this object by spreading the dead expenses, which are large, over a much greater turnover. (d) Employment would be largely increased by the exclusion of foreign imports which are now exceeding the whole of the possible output of all the china manufactories in the Staffordshire potteries. (e) Would nearly double the present amount of employment. Unless an assessor was appointed to appraise the grade, quality, and the price of the goods imported, no tariff would be of any use. Such a system, we understand, has been adopted by the United States. The Trades Unions should be asked the following problem:—Why do they object to the importation of foreign workmen, who would spend most of their wages in the district upon food, &c., and consequently assist us with our local burdens, and yet wish for cheap (and

China
—continued.

nasty) foreign articles, the money for which goes boldly out of the country. Wages in Germany (our principal competitor) are 40 % below ours, and in our trade wages comprise about 50 % of the outlay, and concluding that the same percentage obtains there in materials this would on balance give 30 % on the whole, as stated above.

FORM No. 2,145. Manufacturers of Art Pottery.

Art pottery, 25 per cent.

G. WARRILOW & SONS, QUEEN'S POTTERY, LONGTON; Manufacturers of China Tea and Breakfast Sets, and General and Fancy Goods.

We are anxious to secure our own home trade and that with our Colonies, and nothing less than 30-35 % will keep the foreigner out. We do not see that we can expect, say the States, to give us a preference over Germany of, say, 30 per cent., so we are anxious to secure our own markets.

ANCHOR PORCELAIN COMPANY, LONGTON; Manufacturers of General China, Tea and Breakfast Sets and some Fancy Articles.

We should suggest an import duty of 30 per cent. on china cups and saucers, plates, creams, slops, sugars, all kinds of jugs, mugs, castors, &c. (a) Prices would remain steadier. (b) We are satisfied this would be so (continuity and security in the home trade). (c) It would not reduce cost of production. (d) Yes; this would be so (increased employment). (e) Yes; this would be so (increased wages). We certainly think that special measures are required to prevent the importation of goods directly interfering with the china trade, and a duty of 30 per cent. would have a good effect in that direction.

BISHOP & STONIER, HANLEY, STAFFS.; Manufacturers of Dinner Ware, Toilet Ware, Tea Ware, Jugs, Kitchenware, Flower Pots, Dessert Ware, &c.

A duty on all foreign earthenware equivalent to that of the country from which the articles are imported. (a) We are inclined to think that selling prices in the home market would not be materially increased as we believe competition amongst manufacturers at home is quite close enough to keep them down, and probably this competition would become keener in view of what we say under (d). (b) We believe both these two benefits would be secured. (c) We fail to see how it would secure any reduction in the cost of production. (d) We believe it would tend to increase employment. (e) If employment were increased the natural tendency would be for wages to rise.

Earthenware

G. L. ASHWORTH BROS., HANLEY; Manufacturers of Earthenware, Ironstone China (Domestic) and Sanitary Earthenware.

It is difficult to give any but a very general answer to this question. In some cases a duty of say from 10 % to 20 % would be sufficient, whilst in many other cases a 50 % duty would scarcely be enough. (a) Prices in most cases would be raised, and would be firmer. (b) Greater continuity would be obtained and manufacturers would be in a better position to invest more capital in their businesses, so as to adopt any improved methods in manufacture, to secure better profits. (c) For the reasons stated under (b) the cost of production could often be reduced, whereas under present conditions this is often impossible. (d) Increased and more regular employment would be secured. (e) There would be increased wages earned. Special measures are required to prevent the importation of foreign manufactures below cost price in the country of origin—probably upon some such lines as Canada is proposing to adopt.

MASON, CASH & Co., WOODVILLE, BURTON-ON-TRENT; Manufacturers of Cheap Earthenware and Porcelain.

10 % on general plain and decorated earthenware, also on domestic fireproof ware. (a) Would probably raise prices about 5 %. (b) Would have a most beneficial effect, as in our business, where the profit margin is so very narrow, 5 % makes all the difference. (c) Not much effect in this way. (d) Have no doubt would provide increased employment in a large measure. (e) Would not affect wages very much except, perhaps, to the extent of about 5 % in certain branches, now rather underpaid, owing to keenness of competition.

POUNTNEY & Co., LTD., VICTORIA POTTERY, BRISTOL; Manufacturers of General Earthenware.

We should suggest a duty of 25 % on earthenware, domestic crockery, and 33½ % on china—domestic crockery and fancy. (a) We do not think that if such duties were imposed it would have much effect upon the price in the home market, as the competition would be sufficiently keen to keep the prices from rising. (b) There is no doubt in our opinion that greater continuity and security would be obtained in the home trade; capital would have more confidence, and improvements in methods of production would in consequence be introduced. (c) In our opinion the principal factor for reducing the cost of production is to increase the quantity of output, and if the quantity of output is increased, more use can be made of labour-saving machinery. Consequently if the imposition of these duties results, as we believe it will, in the modernising of our works and improving the method of production, together with the use of labour-saving machinery, we shall inevitably reduce the cost of production. (d) If the cost of production is reduced, the price will go down, and the result will be a constant larger demand and an increase in employment. (e) If the trade is good, and there is a demand for labour, wages will go up. No employer who knows his business ever fights labour on a full order book, with the chance of that full order book being maintained. The first result of duties on foreign manufactured goods would be a great improvement in all our works and methods. There is no doubt that many of our works are old-fashioned and unfitted for the up-to-date production of pottery on a large and cheap scale. The works in North Staffordshire are mainly of a comparatively small size and old-fashioned, which were well enough for the days before machinery came largely into use, but which are utterly unsuited for the use of up-to-date machinery. The employer would greatly reduce his cost of production; the workman would in all probability increase his wages and would be relieved of an immense amount of the heavy "donkey" work which he now does, and would have healthy and convenient shops which would tend to elevate him and make him a better workman and man; the consumer would benefit in that the net result of all this saving of cost would eventually

get back to him in a reduction of price. We may say we are heartily in sympathy with Mr. Chamberlain's policy, as we believe are the majority of manufacturers in our trade. We would also point out that for every £100 which is added to our turnover, the manufacturer would think himself fortunate if he got £7 10s. as profit; of the remaining £93 10s., £45 are paid in wages every Friday night to our workpeople. Coal is our next large item of expenditure; 70% to 80% of this item goes to labour, either for the raising of it or the handling of it. Of clays (which is another large item) some 50 to 60% is labour; and so on through all the other items used. The net result is that out of every £100 our business has increased, some £75 goes directly or indirectly to labour. It is therefore quite erroneous in our opinion to say that Mr. Chamberlain's scheme will benefit the manufacturers at the expense of the rest of the country.

W. & J. A. BAILEY, ALLOA; Earthenware Manufacturers.

We should suggest a duty of 30% *ad valorem* on teapots. Our opinion is that: (a) Prices in the home market would not increase. (b) But there would be more regular and constant employment. (c) Cost of production would not be decreased. (e) Wages would certainly increase in consequence of fuller employment.

THOMAS LEDGAR, HEATHCOTE POTTERY, LONGTON; Earthenware Manufacturer.

We should have to pay more for material and in consequence want more for goods and so allow the foreigner to sell over our heads. The question of the working man is the great cause of our trouble. His work has become inferior to the olden days, speaking generally. He requires less work, more pay and more drink.

FORMS Nos. 2,488 AND 5,181. Manufacturers of General Earthenware, Yellow Ware and Rockingham Teapots.

We want to be able to work full time instead of $\frac{3}{4}$ time. We do not want duties on imports, but freedom to compete in markets abroad without duties against us. The competition in common earthenware is not from abroad. It is amongst ourselves for want of a large enough market. The effect of import duties would be very little in the earthenware trade. China would benefit more. Cheap glass competes more with earthenware; common tumblers have displaced beer mugs largely. There is very little dumping generally and the few lines that come in are not worth legislating for. We want the markets of the world thrown open to us, not that ours should be blocked to others.

FORM No. 4,675. Manufacturers of Sanitary Earthenware.

Earthenware closets, $12\frac{1}{2}$ % *ad valorem*; fire-clay closets, 7s. 6d. per cwt. In the event of these duties being imposed it would be possible to raise the selling price above the cost price to us and so give us the hope of making a profit, and we should therefore feel justified in extending our plant, &c., and so increasing the number of hands employed. With a greater demand for labour, the price of labour is bound to rise. Yes, since closets have been offered in this country at prices which do not pay for the labour, to say anything of cost of material and dead charges. By putting on a fairly heavy duty is the only way to prevent this. If an *ad valorem* duty be imposed, this ought to be calculated on the home manufacturers' selling prices and not on the foreign manufacturers' declared values. The Paris authorities specify for municipal work only goods made in France. Cannot something be done to alter this?

FORM No. 2,462. Fire Clay and Fire Brick Manufacturers.

Fire bricks and fire clay, 20%. (a) 20% better. (b, c, d, e) Yes. We consider that foreign manufactured fire-clay goods should be taxed to prevent them underselling in the markets of the United Kingdom.

M. C. ASHWIN, STRATFORD-ON-AVON; Gristing Miller, Coal Merchant, Brick and Pipe Manufacturer, Lime Burner, &c.

I do not export anything I am glad to say to be annoyed by having foreign duties placed upon my manufactures to prevent them being exported. Willing to do anything to try and stop my country from ruin through one-side bastard free trade. Having been in business more than half a century I should know something of the ruin it has caused in the Midland district.

JAMES BATY & SONS, BOTCHERBY, CARLISLE; Builders, Brick and Tile Makers.

In the interest of our trade—of the country generally I would advise protection on Mr. Chamberlain's lines.

BOWEN & EDWARDS, NORTHWOOD STREET, BIRMINGHAM; Melting Pot and Fire Clay Goods Manufacturers.

We cannot say that we are affected directly by foreign competition, but any measure that will improve the glass and metal trades will materially benefit us as it would increase our output.

HARRIS & PEARSON, FIRE BRICK WORKS, STOURBRIDGE; Manufacturers of Fire Bricks, Gas Retorts, Fire Clay Goods, &c.

We are willing to give any information that may be useful to you, believing that the changes advocated by Joseph Chamberlain and his followers, including a tax on corn and food stuffs, will be to the benefit of this country and particularly to the working classes.

HOLLYBROOK BRICK CO., LTD., CHESTER PARK, KINGSWOOD, BRISTOL; Brick Manufacturers.

I am sure tariff reform is bound to benefit more or less all industries as doubtless when the demand for English-made goods increases, more factories will be wanted, which should improve building and kindred trades.

SAMUEL MELLOR, R. & E. BOTTOM, OAKAMOOB, CHEADLE, STAFFS.; Silica Brickmaker.

A bounty should be given by Government to home growers of wheat, and a system of peasant proprietorship helped forward. We are in favour of allowing the Government a free hand when making new arrangements with foreign countries, and favouring our Colonies as much as possible.

Bricks

313 Remedial Measures E. J. & J. PEARSON, LTD., STOURBRIDGE; Manufacturers of Fire Bricks.

Bricks
—continued.

The importation of fire clay from Germany is due to the special nature of the clay being better adapted to the use for which it is worked up than the English clay. This being so a tariff hardly meets the case. In the event of a tariff being imposed the cost of production in glass works (for which the foreign clay is used) would be slightly increased. It is a great drawback to the clay-working industries of this country that there is not any experienced advisory and testing body, specially constituted for testing and reporting on clays as to their suitability and their proper treatment for various purposes. At the same time assistance by tariff or similar means to the other trades, would indirectly benefit the fire clay trades as it would lead to an increased demand for fire bricks. The special measures should be a thoroughly scientific study of the properties and adaptability of English fire clays for various requirements, such as is undertaken by the Tonindustrie Laboratories at Berlin, which have been of incalculable value to German fire clay manufacturers. A clay-work laboratory similar to that in Berlin should form part of the National Physical Laboratory.

WARNER & Co., KNOWL HILL, TWYFORD, BERKS.; Manufacturers of Bricks, Tiles, Chimney Pots, Whiting and Special Clay Goods.

We think no foreign building bricks or plain roofing tiles should be admitted into the country without a tariff that would insure their not being sold under 28s. per 1,000 and fancy goods (ornamental tiles, moulded bricks, &c.), at corresponding prices.

314 FORM NO. 5,438. Brickmakers.

We think that in the interests of all trades special measures are required to prevent the importation of foreign manufactures below cost price in the country of origin.

WALWYN T. CHAPMAN, TERRA COTTA WORKS, CLEETHORPES, GRIMSBY; Brick and Terra Cotta Manufacturer.

I do not think you will require any further information from me, as your proposed policy can only do injury to the brick and building trades, however it may enrich the millers and machinery manufacturers.

GROVER & SONS, HAMMER BRICK WORKS, HASLEMERE; Brick, Tile and Pipe Makers.

We do not want tariff charged upon rolled iron and wood the only foreign goods we use.

JOHN HALL & SON, THE FIRE CLAY WORKS, DUKINFIELD; Manufacturers of Fire Bricks and various other articles from Fire Clay.

The imposition of any protective tax would increase the cost of our production without enabling us to obtain a better price for our goods and would have a disastrous effect in our trade both upon employer and employed.

315 FORM NO. 4,374. Manufacturers of Sanitary Pipes, Gallies, Chimney Pots, Bricks, &c.

We consider (under protection) wages will go up, coal will advance in price, together with iron, steel, timber and other articles chiefly used in our business, and that it will be quite impossible for us to get better prices for goods of our manufacture to compensate for the extra outlay.

FORM NO. 4,524. Brick and Sand Merchants.

Imports should be taxed.

FORM NO. 5,933. Manufacturers of Sanitary Pipes, Chimney Pots, Fire Bricks, Red Bricks, &c.

We do not consider special measures are required to prevent the importation of foreign manufactures below cost price in country of origin, because our goods being of small value in comparison to their weight it will not pay to import such goods from abroad unless for special purposes, in which price is not an important factor.

LOOKER BROS., COOMBE BRICK WORKS, NEW MALDEN, SURREY; Brick Manufacturers.

We should not have suffered from periods of depression as we have done (during the past 30 years) in our trade if it had not been for free trade.

316 Tiles. GEORGE WOOLISCROFT & SON, LTD., HANLEY, STAFFS.; Manufacturers of Floor and Wall Tiles, Mosaic, Faience and Terra Cotta.

10% on wall and floor tiles. (a) Nil as there is plenty of competition from home manufacturers. (b) It would keep prices as they are which is only paying margin. (c) Do not think it would affect cost of production so far as the home trade is concerned, but if all the Colonies gave a sufficient preference it would increase the export trade and thus affect it. (d) It would increase employment because tiles now imported would be made in England. One of the largest firms of pottery manufacturers have plans for building works in the United States and closing their factories here, unless Tariff Reform comes along within a reasonable time, and this and many other industries will be doomed in the same way. (e) Would not affect wages much as they are satisfactory in our trade,—unless all other trades experienced a prosperous time when they would no doubt rise. The best assistance would be by a preferential tariff in favour of British tiles in all the Colonies.

A. GODWIN, LTD., TILE WORKS, LECKHAMPTON, CHELTENHAM; Tile Manufacturers.

We suggest a 20% duty on Dutch glazed tiles. The effect would be: (a) We could advance prices quite 20%. (b) More orders would be secured. (c) We do not think cost of production could be reduced. (d) and (e) Increased employment would mean better earning power. Special measures are certainly required to prevent the dumping of foreign manufactures, but we cannot say how the measures should be framed.

Craven, Dunnill & Co., Jackfield, Shropshire; Manufacturers of Floor Tiles, Enamel, Wall, Printed and Painted Tiles, &c.

On white wall tiles from Holland 20 %; on enamelled (coloured) from Holland 25 %; on printed tiles from Holland 33½ %. (a) There would be no effect because the competition among the manufacturers themselves operates, and will continue to operate to keep the price at the level it is now and has been for many years past. The price is crystallised. (b) It would cause the foreign manufacturer to pay such duty, i.e. to reduce his price pro rata of the duty to such an extent, that it would keep him out precisely as having to reduce our price keeps us out when sending to the foreign market. We cannot afford to reduce our prices to the amount needed by the duty. (c) We do not see how a duty on foreign tiles coming into England would affect the cost of production here or on the continent. (d) If the work done with foreign tiles had been done with English tiles there would have been a corresponding increase of employment in English tile manufactories. (e) and a consequent larger amount of wages paid. We do not think any special measures are needed against dumping beyond that every tile should bear the name, or recognized abbreviation, of the country in which it is manufactured, on the back. It is useless to mark the packing case only. We should like to suggest that it would be of use if some method could be devised by which there would be such a connection between the Patent Office and the Customs that would result in the exclusion of goods manufactured abroad from pirated English patents. There are also cases of registered designs of English makers being imported on articles (for which these designs were invented and registered in England) of foreign make. Foreign travellers in England pay no fees. In many foreign countries English travellers have to pay fees.

John Alexander & Sons, Nethermuir, Bathgate, N.B.; Tile Makers.

We may state that since the year 1841, when our business was first started, our sales for drain pipes have come down to one-fourth of what they originally were, notwithstanding the fact that within the past 25 years 16 different works of the kind have closed, and are out of competition with us. We blame the free importation of grain for this state of matters. Agriculture is not paying and we know of a great many cases where neither landlord nor tenant can afford to spend money on draining. The only remedy we can suggest is to give the farmers a bounty of 10s. or 15s. per quarter for the wheat they may have in the stack-yard in February.

Form No. 2,145. Rustic Art Ware Manufacturer.

Art pottery, 25 %.

(H) COLONIAL PREFERENTIAL TARIFFS.

Colonial Preferential Tariffs

QUESTION 13 (FORM VIII):—*What is your experience with regard to the effect of Colonial or other Preferential Tariffs? If benefit has arisen to your trade, please give specific details and illustrations.*

J Aynsley & Sons, Portland Works, Longton; China Manufacturers.

We have not found foreign competition affect us so much in the Colonies since we had the preferential tariff. Our business with the Colonies has increased since then.

Bishop & Stonier, Hanley, Staffs.; Manufacturers of Dinner Ware, Toilet Ware, Tea Ware, Jugs, Kitchen-ware, Flower Pots, Dessert Ware, &c.

Our trade with Canada has developed in a very marked way since the preferential tariff. It is at least double.

Blair & Co., Beaconsfield Pottery, Longton, Staffs.; China Manufacturers.

Until recently our business with Canada was small, but under the advantage of a preferential tariff it is increasing. We have been doing a good business in New Zealand and anticipate a great increase under the new tariff arrangements.

E. Brain & Co., Foley China Works, Fenton, Staffs.; General China Manufacturers.

We have reaped considerable advantage from the preferential tariffs.

Herbert J. Colclough, Goddard Street, Longton, Staffs.; Manufacturer of General China, chiefly Tea and Breakfast Ware.

Have recently been able to appoint agents in South Africa and Canada to develop the trade, though formerly I could not get such, as the trade was not sufficient to induce them to act.

Edwards & Brown, High Street, Longton; Manufacturers of General China.

Our own experience applies to Canada alone. In autumn last we sent out a traveller there who obtained barely sufficient orders to pay the expenses and which does not at present warrant us in sending him again, as from all he could gather the Germans had reduced their prices to an extent which counterbalances the preferential tariff which the Canadians had recently granted us.

E. Hughes & Co., Opal China Works, Fenton, Staffs.; Manufacturers of China Ware.

Whilst we are rapidly losing the Australian trade our Canadian trade is increasing, so much so, that we have now a direct representative to travel through Canada with our goods. We have never been able to do this before and it is now possible only through the preference given us by the Canadian government. Our representative's reports are most encouraging, and his success is largely attributable to the preference. He is very sanguine as to the great benefits which will ultimately result if the present preference is sustained.

- continued.

RIDGWAYS, BEDFORD WORKS, STOKE-ON-TRENT ; China Manufacturers.

A large and increasing trade will be done with Canada in the immediate future. We attribute the increase of exports to Canada in a large measure to the preferential tariff, a preference which the surtax on German goods considerably increases. We do not anticipate that the new tariff will be disadvantageous to us.

TAYLOR & KENT, FLORENCE WORKS, LONGTON, STAFFS. ; Manufacturers of China Ware.

Slight increase from Canada and South Africa.

T. G. WATSON, 16, EASTCHEAP, LONDON, E.C ; Import & Export Merchant dealing in Hollow Ware, China Ware, Electro-Plate Goods, &c.

Proportion of foreign goods has been reduced since Customs preference came into operation at the Cape. Orders formerly placed or indented for foreign manufacturers are now given to British houses where similar goods on a par or little over Continental quotations can be supplied. I find houses for which I buy anxious to get British goods if manufacturers can compete.

Our total exports directed to British possessions have diminished owing to bad trade during 1903 in South Africa. The proportion of foreign-made goods to British-made goods has been about stationary for the past 6 or 8 years. Prior to that time it was about half. Lines made in Great Britain get preference where value is on a par and preferential tariff is in favour of British competitive goods in South Africa.

F. WILLIAMSON, LONGTON, STAFFS. ; Manufacturer of General China.

We have found our trade in Canada considerably increased by the preferential tariff.

FORM No. 6,671 ; China Manufacturer.

Our trade with Canada has increased since the preferential tariff came in.

W. & J. A. BAILEY, ALLOA ; Earthenware Manufacturers.

Canada, slight improvement.

JAMES BROADHURST & SONS, FENTON, STOKE-ON-TRENT ; Manufacturers of Ordinary Domestic Earthenware.

We have done 25 % more business with Canada since the duties on English goods were lowered, and the tendency is to increase of business every year, wholly or partially through the preference.

MASON, CASH & Co., WOODVILLE, BURTON-ON-TRENT ; Manufacturers of Cheap Earthenware and Porcelain for Electrical Purposes.

Our Canadian trade has almost doubled since introduction of the preferential tariff. Were the full duty charged on our goods the trade would drop through, as ours is a very cheap class of goods. With Australia we are doing practically nothing. African colonial trade is a little better.

POUNTNEY & Co., LTD., VICTORIA POTTERY, BRISTOL ; Manufacturers of General Earthenware.

We are now developing the trade in Canada, New Zealand and South Africa, and the preference helps us materially in this respect, and has induced us to lay our plans for the development of the business in those markets.

FORMS NOS. 2,488 AND 5,181. Manufacturers of General Earthenware, Yellow Ware and Rockingham Teapots.

The reduction of the Canadian duties has let our stuff into that market again to some extent. At one time we had a very good trade there for cane ware, but the heavy duties shut us out eventually.

FORM No. 4,675. Manufacturers of Sanitary Earthenware.

Have not yet succeeded in doing any colonial trade.

PENCOED & DINAS POWIS BRICK & TILE Co., LTD., PENCOED, BRIDGEND ; Brick and Tile Makers.

We do not think colonial or other preferential tariffs would in any way benefit our trade.

FORM No. 2,319. Manufacturers of Silica Bricks and Cement for Steel, Glass, Copper and Gas Furnaces.

The U.S.A. competed with us in Canada, where we failed to do business until after the Dominion Government had granted preferential terms to British goods. Since then we have done considerable business

FORM No. 2,379. Manufacturers of Fire Clay Sanitary Fittings, Baths and Glazed Fire Clay Ware.

The preference in Canada and South Africa has enabled us to compete with other countries.

CRAVEN, DUNNILL & Co., JACKFIELD, SHROPSHIRE ; Manufacturers of Floor Tiles, Enamel, Wall, Printed and Painted Tiles, &c.

We have had very little experience of the benefit of colonial preferential tariffs so far. We have certainly had more enquiries from Canada. The business we have had with Canada has fluctuated as follows : 1899, £90 ; 1900, £260 ; 1901, £235 ; 1902, £29 ; 1903, £133.

GEORGE WOOLSCROFT & SON, LTD., HANLEY, STAFFS.; Manufacturers of Floor and Wall Tiles, Mosaic, Faience and Terra Cotta.

The Canadian preference has not yet affected us; they buy mostly from the U.S.A., though some tile firms have done more business than we have in Canada, and an increase of the preference would no doubt bring the bulk of the tile trade to this country.

(1) PATENT AND REGISTRATION LAWS.

Patent and
Registration Laws

Question 10 (FORM I):—Do you suffer any disadvantages from the operations of the Patent Laws or Registration Laws in other countries?

CHARLES ALLERTON & SONS, PARK WORKS, LONGTON, STAFFS.; Manufacturers of General China, Earthenware, Fancy Goods, &c.

Our patterns and shapes are copied, although registered in England, and are imported here. Registration should effectually stop this.

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BISHOP & STONIER, HANLEY, STAFFS.; Manufacturers of Dinner Ware, Toilet Ware, Tea Ware, Jugs, Kitchenware, Flower Pots, Dessert Ware, &c.

We have not patented or registered any shapes in foreign countries, but we are given to understand that if we did the Germans would copy them if they wished to all the same, as their registration laws in some way permit them to do so, or in some way nullify ours.

BLAIR & Co., BEACONSFIELD POTTERY, LONGTON, STAFFS.; China Manufacturers.

The registration laws of our own country are practically valueless. One of our registered patterns may be copied by a German and sold in England without our having any remedy whatever; but had the same thing occurred to a German, his government steps in voluntarily and protects him by confiscating the goods.

BLYTH PORCELAIN Co., LTD., BLYTH WORKS, HIGH STREET, LONGTON; Manufacturers of General China.

Certainly we suffer disadvantages from the operations of the patent laws of other countries, as any shape or pattern we may register here if of value is immediately copied on the other side of the Channel.

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E. BRAIN & Co., FOLEY CHINA WORKS, FENTON, STAFFS.; General China Manufacturers.

We are subject to very great injustice, as our shapes and patterns registered in this country are copied abroad and imported here. Such registration should secure immunity from imported goods.

SAMPSON BRIDGWOOD & SON, ANCHOR POTTERY, LONGTON, STAFFS.; Manufacturers of General China and Earthenware.

Our registered shapes and patterns are copied abroad and imported here.

H. J. COLCLOUGH, GODDARD STREET, LONGTON, STAFFS.; Manufacturer of General China, chiefly Tea and Breakfast Ware.

Goods (both as regards shapes and patterns) registered here, are copied abroad and imported here. Registration should prevent the importation of imitations from abroad.

EDWARDS & BROWN, HIGH STREET, LONGTON; Manufacturers of General China.

We suffer from the patent laws in Germany in particular. Anything new that we bring out of any good they immediately copy, whether registered or not.

HILL & Co., LONGTON, STAFFS.; Manufacturers of General China and Fancy Goods.

We are suffering to a very great extent, as other countries copy our shapes and patterns although registered here. We certainly think registration should protect us from the above.

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THE LONGTON PORCELAIN Co., VICTORIA WORKS, HIGH STREET, LONGTON; Manufacturers of China Tea and Breakfast Ware.

We go to the trouble and expense of registering a shape or a pattern here, but the foreigner can copy it and import it into this country with impunity. Our competitors here who share with us our burdens of Imperial and local taxation and rates are prevented from making our registered goods, but the Germans, who contribute nothing to our country's expenditure, can come in with exact imitations and undersell us by 30%. (The writer is the Secretary of the English China Manufacturers' Association, and is both willing and able to prove that under the present system the trade of Longton and Fenton, with 60,000 population, cannot possibly continue.)

THOMAS MORRIS, LTD., REGENT WORKS, LONGTON; Manufacturers of General China and Fancy Goods.

We are subject to very great injustice, as shapes and patterns registered in this country are copied abroad and imported here; such registrations should secure immunity from imported goods.

REDFERN & DRAKEFORD, BALMORAL WORKS, LONGTON, STAFFS. ; Manufacturers of General China and Fancy Goods.

Any new shape or design as soon as it becomes a commercial commodity on the market, is very quickly copied by our continental rivals.

WILD BROS., EDENSOR CROWN CHINA WORKS, LONGTON, STAFFS. ; Manufacturers of General China.

Patterns and shapes registered in this country are copied abroad and imported here. Such registration should secure immunity from imported goods.

FORM No. 2,454. Manufacturers of General China.

Should like the registration of a shape or pattern in Great Britain to be sufficient to secure immunity from the same being copied by foreigners and imported here.

FORM No. 2,786. Manufacturer of General China.

We suffer because when we register a design, or patent anything, the Germans copy it, and are allowed to send it into this country at considerably less price and thus spoil and ruin our trade, although we have paid a lot to produce the article : but they can reproduce it at a very little cost, taking our brains and our living from us.

FORM No. 2,821. Manufacturers of General China and Fancy Goods.

We are subject to very great injustice as regards shapes and patterns registered in this country, as they are copied abroad and imported here. Such registration should secure immunity from imported goods.

FORM No. 3,128. Manufacturers of General Tea and Breakfast China and Fancy Articles.

We suffer disadvantages from the operation of patent laws in our own country, as shapes and patterns registered here are copied abroad and imported here. Such registrations should protect us from infringement by foreigners who export goods.

FORM No. 3,132. Manufacturers of General China.

Patterns and shapes registered in this country are copied abroad and imported here. Such registration should secure immunity from imported goods.

ANCHOR PORCELAIN COMPANY, LONGTON ; Manufacturers of General China, Tea and Breakfast Sets and some Fancy Articles.

We suffer from the injustice of shapes and patterns being copied in foreign countries and then imported here in competition with our own.

FORM No. 4,612. China Manufacturers.

We are subject to great injustice, as shapes and patterns registered in this country are at once copied in Germany and Austria, and imported here. Such registrations should secure immunity from imported goods.

STAR CHINA COMPANY, ATLAS WORKS, LONGTON ; China Manufacturers.

Our shapes and patterns are copied by foreign makers and afterwards sent to our home markets.

FORM No. 6,574. Manufacturers of Tea and Breakfast Sets, Fancy Goods and General China.

We are subject to very great injustice, as shapes and patterns registered in this country are copied abroad and imported here. Such registration should secure immunity from imported goods.

C 1,885. Fire Clay Works.

The essential difference between the patent laws of every important European nation and of our own lies in this : the English law makes no stipulation as to place of manufacture ; each European nation, on the contrary, makes it a *sine qua non* that after a limited period the manufacture of the article protected shall be adequately carried on within that kingdom, or the protection is withdrawn. That the subject is of importance may be gathered from the Appendix marked H, Comptroller's Report for 1903. It will be seen that for the past 4 years the patents granted to foreigners practically equal the number granted to those at home. No figures are available before 1900, but as the duration of a patent may be 14 years, the previous 10 years' patents have to be considered, and it would seem fair to estimate these as averaging 5,000 per year. Our cost of production, working at various rates, in the manufacture of fire-clay goods, is as follows : Working at full time we have a fair profit, at $\frac{3}{4}$ -time a very fair profit, and at $\frac{1}{2}$ -time considerable loss.

GRIMWADES LTD., STOKE-ON-TRENT ; Earthenware Manufacturers.

We cannot register our shapes or designs in Germany or Sweden, or indeed any Continental country, in such an effective manner as will protect them from imitation. Also we are unable to get protection from infringement of copyright designs.

SAMUEL OWEN, 38, SUN STREET, FINSBURY, LONDON, E.C. ; Manufacturer of Sanitary Earthenware, Drain and Soil Pipes, &c.

Patent laws are much too costly in this country and prevent our native patents coming to the front.

JOHN HALL & SON, THE FIRE CLAY WORKS, DUKINFIELD ; Manufacturers of Fire Bricks, &c.

Our trade, as well as other trades, suffers from the anomalous and unsatisfactory patent and registration laws of this country.

BOOTHORPE PIPE CO., WOODVILLE, BURTON-ON-TRENT; Makers of Sanitary Pipes, Chimney Pots, Bricks, Electrical Conduits, Fire Bricks, &c.

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An inventor is allowed to patent anything for which he can pay the small fees required, without any inquiry as to whether it is new or only an old and rejected idea that he has revived. He then proceeds to worry a manufacturer for infringement of "his" patent, although the same article, or one with a very slight variation, has been made in the trade for years. I think no patent ought to be granted until it is proved (1) that it is new, not an expired or expiring patent, made with some variation simply to extend the patent for 7 years, and (2) that it is of value and not merely a trap to catch anyone making a similar thing.

FORM No. 3,493. Manufacturers of Gas Retorts, Fire Bricks, Large Bricks and Fireclay.

There is a great handicap on our patent laws as against the Continent, as they can take an English patent and manufacture the article abroad, but they do not allow this privilege to us.

CRAVEN, DUNNILL & Co., JACKFIELD, SHROPSHIRE; Manufacturers of Floor Tiles, Enamel, Wall, Printed and Painted Tiles, &c.

When a certain railway was being made we not only lost the contract for the tiles, but the foreign firm who supplied them stole our patent for making key backs. Our laws do not provide apparently for stopping goods made by infringed British patents. The only useful place to stop them would be in the Custom House.

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FORM No. 1,905. Manufacturers of Bricks, Roofing Tiles, Malt-kiln Tiles, Land Draining Pipes, Ridge Tiles, Bath Bricks, &c.

The writer has had recourse to the Patent Office on 5 or 6 occasions, and can endorse almost every complaint he has ever heard launched against the law of British patents. The charges are burdensome, and the security really given is quite nominal, often nil against close imitations that prejudice the principles and the prospects of success of honest inventors. In this instance Germany and the U.S. offer an example which might be followed by England. It cannot be said that "they do things better in France." Both Germany and the U.S. render British patents almost impossible by exactions, and in neither country is gross piracy unknown; but once passed they are absolutely protected.

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SECTION V.—STATISTICAL TABLES.

Table 3

TABLE 3.—AVERAGE ANNUAL EXPORTS OF EARTHEN AND CHINA WARE, PARIAN AND PORCELAIN FROM THE UNITED KINGDOM (IN THOUSANDS OF £).
(According to Board of Trade Returns.)

	1875- 1879.	1880- 1884.	1885- 1889.	1890- 1894.	1895- 1899.	1900.	1901.	1902.	1903.
France	73	98	67	53	65	65	55	57	69
U.S.A.	606	850	814	861	697	590	503	490	569
Brazil	111	98	71	68	63	64	57	63	68
Other Foreign Countries..	461	402	327	304	363	475	435	427	442
Total to Foreign Countries ..	1,251	1,448	1,279	1,286	1,188	1,194	1,050	1,037	1,148
South Africa	42	49	43	62	88	80	108	169	226
India	107	134	107	99	75	82	92	84	96
Australia	208	275	250	187	176	231	253	169	139
Canada	90	104	132	123	133	146	148	144	202
Other British Possessions	30	51	93	111	113	119	163	128	133
Total to British Possessions ..	477	613	625	582	585	658	764	694	796
Total to all Countries ..	1,728	2,062	1,904	1,868	1,773	1,852	1,814	1,731	1,944

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Table 4

TABLE 4.—AVERAGE ANNUAL EXPORTS OF CLAY, UNMANUFACTURED, FROM THE UNITED KINGDOM.
(According to Board of Trade Returns.)

	1875- 1879.	1880- 1884.	1885- 1889.	1890- 1894.	1895- 1899.	1900- 1904.	1905.
WEIGHT (THOUSANDS OF TONS).							
U.S.A.	8	14	25	54	93	147	199*
Other Foreign Countries ..	125	157	174	204	251	296	335
Total to Foreign Countries ..	133	171	199	258	344	443	534
Total to British Possessions ..	—	—	9	12	18	23	30
Total to all Countries ..	133	171	208	270	362	466	564
VALUE (THOUSANDS OF £).							
U.S.A.	13	21	36	75	128	201	239
Other Foreign Countries ..	130	164	173	202	242	280	307
Total to Foreign Countries ..	143	185	209	277	370	481	546
Total to British Possessions ..	—	—	12	19	25	31	40
Total to all Countries ..	143	185	221	296	395	512	586

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* This must consist largely of China clay as is evident from the fact that the United States returns show an importation in 1905 from the United Kingdom of 181,000 tons of clay other than common blue clay, out of a total importation of 200,000 tons from all Countries. It is known that of the 200,000 tons, 151,000 tons consisted of China clay or kaolin.

TABLE 5.—AVERAGE ANNUAL EXPORTS OF BRITISH RED POTTERY AND BROWN STONEWARE **Table 5**

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(THOUSANDS OF £).

(According to Board of Trade Returns.)

	1875- 1879.	1880- 1884.	1885- 1889.	1890.	1891.
Total to Foreign Countries	79	100	96	162	122
Total to British Possessions	7	12	20	28	28
Total to all Countries	86	112	117	190	150

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TABLE 6.—AVERAGE ANNUAL EXPORTS OF MANUFACTURES OF CLAY FROM THE UNITED KINGDOM **Table 6**

(IN THOUSANDS OF £).

(According to Board of Trade Returns.)

	1875- 1879.	1880- 1884.	1885- 1889.	1890.	1891.
Total to Foreign Countries	150	171	163	217	212
Total to British Possessions	39	40	36	59	54
Total to all Countries	189	211	198	276	266

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TABLE 7.—AVERAGE ANNUAL EXPORTS OF BRITISH BRICKS (THOUSANDS OF £).

Table 7

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(According to Board of Trade Returns.)

	1892- 1896.	1897- 1901.	1902.	1903.	1904.	1905.
Total to Foreign Countries	151	189	141	151	151	164
Total to British Possessions	32	45	55	73	74	74
Total to all Countries	183	233	196	224	225	238

TABLE 8.—EXPORTS OF POTTERY FROM GERMANY TO ALL COUNTRIES (THOUSANDS OF £).
(According to Official German Returns.)

	1898.	1899.	1900.	1901.	1902.	1903.	1904.	1905.
Common Unglazed Bricks, &c.	198.8	168.6	145.8	125.1	131.4	124.2	114.2	98.9
Unglazed Drainpipes, not Fireproof	6.5	6.8	6.3	6.7	8.8	5.8	5.0	3.5
Common Unglazed Earthenware	3.5	4.8	8.7	9.0	6.7	3.8	3.5	2.8
Unglazed Stones, Fireproof ..	212.1	277.1	291.1	194.4	182.0	228.7	251.2	235.6
Architectural Decorations ..	1.9	2.4	3.7	.8	.5	.2	.9	.6
Glazed Bricks, Tiles, &c. ..	145.6	128.0	93.6	89.4	91.7	99.4	98.9	95.0
Glazed Drainpipes	14.8	12.9	25.4	13.2	10.1	10.7	15.0	11.6
Common Glazed Earthenware ..	67.1	60.0	61.8	69.6	56.7	73.1	78.9	85.3
Melting Pots	12.5	15.6	17.8	18.0	51.7	64.4	62.5	68.0
Retorts, &c., other Fireproof Ware and Fine Terra Cotta ..	19.6	20.3	22.1	19.9	23.1	27.5	32.9	38.0
Pottery, n.e.s.—								
(1) Of one Colour :								
Ovens and Parts	42.0	37.9	28.1	17.9	14.5	19.1	17.7	11.4
Other	85.9	132.1	172.9	171.3	165.3	152.8	177.9	188.5
(2) Of more than one Colour, Painted or Gilded	485.8	531.0	656.4	567.9	530.5	604.6	709.4	735.1
Porcelain and Porcelain Ware :								
White	168.0	183.3	238.4	212.4	225.0	233.8	267.5	274.1
Coloured, Painted, Gilded, &c. :								
Table Ware	1,036.7	1,080.7	1,267.0	1,564.1	1,641.4	1,882.1	2,298.5	2,314.2
Fancy Ware	335.1	366.4	435.5	527.3	600.3	541.2	622.1	730.7
Other	141.8	172.7	204.6	170.2	149.8	133.5	168.2	183.7
All Other	5.3	3.9	5.2	4.1	3.9	6.0	12.6	8.9
TOTAL	2,983	3,204	3,684	3,781	3,893	4,211	4,937	5,086

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Table 9

TABLE 9.—EXPORTS OF POTTERY FROM GERMANY TO THE UNITED KINGDOM (THOUSANDS OF £).
(According to Official German Returns.)

	1898.	1899.	1900.	1901.	1902.	1903.	1904.	1905.
Pottery, n.e.s., of more than one Colour, Painted or Gilded ..	14.7	21.6	30.5	19.5	21.9	22.3	21.5	20.0
Porcelain or Porcelain Ware :								
White	17.0	25.6	27.2	25.3	43.0	42.6	35.9	47.8
Coloured, Gilded, &c. :								
Table Ware	272.5	254.8	304.6	323.6	308.0	350.0	425.1	364.8
Fancy Ware	163.7	147.1	137.4	159.2	188.8	141.2	181.6	178.2
All Other	16.2	25.4	29.0	21.3	24.6	37.2	33.9	36.4
TOTAL TO UNITED KINGDOM	484	474	529	549	586	593	698	647

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TABLE 10.—EXPORTS OF POTTERY FROM BELGIUM TO ALL COUNTRIES (THOUSANDS OF £).

Table 10

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(According to Official Belgian Returns.)

—	1896.	1897.	1898.	1899.	1900.	1901.	1902.	1903.	1904.	1905.
Terra Cotta :										
Bricks, Drainpipes, &c.	343.1	349.2	295.8	391.8	344.5	304.6	355.8	474.4	456.6	346.8
Tiles	7.4	5.6	3.8	3.1	4.0	4.1	3.4	4.9	5.1	3.0
Slabs for Pavements and Constructions of all kinds	32.1	25.8	18.4	18.6	17.2	17.8	19.8	20.0	22.8	25.6
Common Pottery .. .	26.3	32.0	16.2	19.2	25.4	28.9	23.4	23.6	16.8	19.4
Glazed Earthenware (except Slabs)	102.8	106.9	109.6	96.6	105.0	130.9	131.6	119.5	113.7	116.8
Porcelain (except Slabs) ..	10.9	9.1	7.1	8.0	7.4	7.4	7.9	5.2	8.2	9.1
TOTAL .. .	523	529	451	537	504	494	542	648	623	521

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TABLE 11.—EXPORTS OF POTTERY FROM BELGIUM TO THE UNITED KINGDOM (THOUSANDS OF £).

Table 11

—	1896.	1897.	1898.	1899.	1900.	1901.	1902.	1903.	1904.	1905.
TOTAL .. .	6.8	12.1	12.8	11.3	9.5	10.6	9.4	9.6	10.9	12.4

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TABLE 12.—EXPORTS OF POTTERY FROM AUSTRIA-HUNGARY TO ALL COUNTRIES (THOUSANDS OF £).

Table 12

(According to Official Austrian Returns.)

—	1895.	1896.	1897.	1898.	1899.	1900.	1901.	1902.	1903.	1904.	1905.
Common Unglazed Bricks ..	12.4	16.9	12.8	14.5	9.5	9.3	7.8	5.0	5.5	6.2	10.2
Fire and Kilm Bricks .. .	8.5	13.8	13.0	21.6	40.2	52.0	21.2	21.7	27.4	31.7	33.7
Slabs, Tiles, Plaques for Walls and Flooring .. .	5.2	7.0	3.8	4.5	14.1	13.7	16.3	18.4	21.8	17.6	14.2
Pottery, n.e.s. :											
Of one Colour .. .	6.8	5.9	4.3	6.5	7.8	6.9	5.5	7.6	11.3	14.0	21.0
Of more than one Colour, Bor- dered, Painted, Gilded, &c.	172.0	190.6	183.8	192.8	176.7	201.5	213.5	205.2	221.9	212.5	261.8
Porcelain :											
White .. .	50.4	48.4	43.8	55.8	70.4	72.2	76.9	69.3	86.7	110.8	146.4
Coloured, Bordered, Painted, Gilded, &c. .. .	391.7	414.9	402.0	392.1	391.8	421.4	457.4	459.3	529.2	599.8	732.0
All Other .. .	20.8	18.5	19.8	21.5	23.7	22.0	23.5	21.8	24.1	28.4	28.5
TOTAL .. .	668	716	683	709	734	799	822	808	928	1,021	1,248

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TABLE 13.—EXPORTS OF POTTERY FROM AUSTRIA-HUNGARY TO THE UNITED KINGDOM
(THOUSANDS OF £).

	1895.	1896.	1897.	1898.	1899.	1900.	1901.	1902.	1903.	1904.	1905.
Pottery, n.e.s., of more than one Colour, Bordered, Painted, Gilded, &c.	14.3	14.2	16.0	22.7	25.8	32.5	49.2	31.2	35.2	35.3	40.8
Porcelain—Coloured, Bordered, Painted, Gilded, &c.	9.0	9.9	19.6	18.0	13.8	36.7	37.9	47.1	73.9	160.2	230.8
All Other2	.8	.9	1.6	3.1	4.1	3.5	.9	2.0	3.7	7.1
TOTAL TO UNITED KINGDOM	24	25	36	42	43	73	91	79	111	199	279

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Table 14

TABLE 14.—EXPORTS OF POTTERY FROM FRANCE TO ALL COUNTRIES (THOUSANDS OF £).
(According to Official French Returns.)

	1895.	1896.	1897.	1898.	1899.	1900.	1901.	1902.	1903.	1904.	1905.
Fire-proof Pottery of Common Clay	43.2	64.5	78.1	98.9	128.3	120.4	110.4	161.3	110.1	108.9	125.6
Drain Pipes, Earthen Pipes and other Potteries of Common Earth	75.9	85.9	65.4	59.7	57.2	62.2	56.0	58.4	69.0	62.4	61.1
Slabs and Ceramic Pavement: Of Common Earth, not Varnished or Enamelled	78.6	124.3	102.8	115.5	121.2	101.7	111.9	112.0	120.9	126.0	154.9
Other	46.5	42.6	42.3	38.2	42.8	48.9	42.7	50.7	45.9	52.0	59.0
Glazed Earthenware	118.8	128.3	113.3	117.0	140.2	140.9	151.6	168.6	175.7	178.3	206.3
Porcelain:											
White	256.5	260.1	239.2	175.4	230.1	287.2	296.5	318.2	337.3	313.1	305.6
Decorated	232.9	289.1	291.8	283.8	314.8	357.0	339.5	289.6	382.6	431.5	422.0
Bricks and Tiles, not Varnished or Enamelled	137.4	151.5	165.2	144.5	165.7	119.2	138.2	138.2	154.2	144.3	162.6
All Other	16.2	21.2	46.2	35.4	19.8	16.0	23.0	21.1	21.7	27.9	19.1
TOTAL	1,006	1,167	1,144	1,068	1,220	1,253	1,270	1,318	1,417	1,444	1,516

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Table 15

TABLE 15.—EXPORTS OF POTTERY FROM FRANCE TO THE UNITED KINGDOM (THOUSANDS OF £).

	1895.	1896.	1897.	1898.	1899.	1900.	1901.	1902.	1903.	1904.	1905.
Porcelain:											
White	104.9	37.6	129.2	72.8	103.2	141.6	165.1	204.5	215.2	171.8	159.8
Decorated	43.4	54.3	89.7	81.0	83.6	97.5	113.9	89.6	90.1	79.2	72.4
Other	5.9	7.1	8.9	8.2	10.6	9.3	9.1	13.0	8.1	7.3	8.2
TOTAL	154	99	228	162	197	248	288	307	313	258	240

INDEX

Abbreviations used in this Index:—

U.K. = United Kingdom.

U.S.A. = United States of America.

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