

instructive proof of the condition to which the fibre may be brought by special care and attention.

The next division of the collection illustrates the classification of the various qualities of fibre as adopted by the brokers in England. Taking as a guide tables A & B (App. No. XII) framed from information which was courteously afforded to the Commissioners by Messrs. McLandress, Hepburn, & Co., of Dunedin, it is found that there have been five recognised classes in the London market, during the year ending May, 1871. This classification is determined chiefly by the degree to which the fibre has been cleaned and freed from scull, but it is also influenced by considerations of colour and texture. Such terms as "mixed in colour," "harsh," "wiry," "poor colour," "green and brown in colour," "red ends," "croppy," "coarse," "rough," "much straw," "red colour," and "heeled," being of frequent use, any one of these depreciating the value of otherwise superior fibre, to the extent of several pounds sterling per ton.

Classification of fibres in market.

This section also includes a series of samples from parcels that have been sold by auction in London, with the dates of sale, and prices obtained; these, of course, are not of very recent manufacture, as it is probably not less than eighteen months since they were despatched from the Colony, and they are certainly not equal in quality to much that is now exported; but they are useful as showing the exact staple which fetches certain prices in the home markets.

Taking the proceeds of the sales of 6,000 tons of fibre at £140,500, as stated in table A, and assuming that each ton delivered in London has cost the manufacturer £25, viz., £16 for manufacture, and £9 for freight and other charges, there will have been a loss to the Colony of £9,500 on this export from May, 1870, to July, 1871. But as there would be a profit of £10,950 on the two first classes, the manufacturers of the remainder have lost over £20,000; whereas, if they could have produced fibre of good quality, there would have been a clear gain over cost of production of £15,088, or a total profit on the 6,000 tons of more than £26,000.

Results of sales in 1870.

The table shows clearly, as has already been stated, that the quality of the fibre sent to England has decidedly improved during the past year. A much larger proportion of the three first classes were received in April and May, 1871, than in the corresponding months of 1870; and the amount of "sea damage" appears to have been reduced to a minimum.

Quality improved.

In addition to the smaller samples previously referred to, this part of the collection includes bales from the several consignments of the fibre that have been sent by the Commissioners to the agents in England for distribution amongst manufacturers, together with two bales of *Phormium* fibre which were selected by Messrs. Noble, and sent back to the Colony by Mr. Morrison, as representing the class of fibre which is most in demand in the home market. In this part of the collection are also the bales of fibres with which *Phormium* has to compete, and which have been already mentioned as having been selected by Messrs. Noble. One of the most interesting of these is the Sisal fibre which is prepared in Yucatan, from a species of Aloe; and although an intrinsically inferior fibre, being harsh and deficient in strength, is so similar in appearance to Manilla, that it fetches within a few pounds of the average value of that fibre. So long as the chief application of the *Phormium* fibre is to the production of white rope, Sisal hemp is the only fibre that will really compete with it as a substitute for Manilla. As these different fibres have been obtained in sufficient quantity to allow of samples being supplied to all parts of the Colony, manufacturers will at an early date be afforded an opportunity of making themselves acquainted with their characters.

Competing fibres

An examination of Tables C. and D., given in the Appendix, which state the quantity of roping fibres and jute imported into England and America, is both interesting and instructive; although it has not been found possible to procure the information from both countries for corresponding periods. It appears that whilst in England, for the year 1870, 55,442 tons of roping hemp were received, only 6,467 tons of Manilla were included, being scarcely more than 11½ per cent. of the whole quantity, and very little in excess of the *Phormium* fibre that was introduced during that year. Whereas in the United States, in the year 1867,

Consumption of white fibre.