

1905.
NEW ZEALAND.

INDUSTRIES AND COMMERCE REPORT

(22nd August, 1905).

BY THE MINISTER OF INDUSTRIES AND COMMERCE, HON. SIR J. G. WARD, K.C.M.G.

Presented to both Houses of the General Assembly by Command of His Excellency.

Department of Industries and Commerce, Wellington, 22nd August, 1905.

MY LORD,—

I have the honour to submit to Your Excellency the report of the Department of Industries and Commerce for the year ending the 31st March, 1905.

I have, &c.,
J. G. WARD,
Minister of Industries and Commerce.

His Excellency the Governor of New Zealand.

In presenting this my fourth annual statement I have great pleasure in intimating that the Department continues to do good and useful work. The policy of keeping the products of the colony prominently before the consuming markets of the world is being steadily followed, and during the past year with particularly good results. Advantage was taken of the opportunities offered by the St. Louis Exposition held at St. Louis, U.S.A., the Colonial Products Exhibition held at Liverpool, and the Indian and Colonial Exhibition held at the Crystal Palace, London. At all three of these exhibitions very fine displays of the products of the colony were made, and in each instance with the best of results. Referring to the two English Exhibitions, I beg to draw attention to the reports, which state that New Zealand's displays at these Exhibitions were much more complete and attractive than that of any other of His Majesty's colonies. This is a subject for congratulation, and speaks well for the energy and resource of the responsible officers of the Department.

The illustrations attached hereto will give some idea of the complete and thorough manner in which the representation of the colony was effected at the Colonial Products Exhibition, Liverpool, and the Indian and Colonial Exhibition, Crystal Palace, London, and when referring to the subject of these Exhibitions I should like to record that the suggestion to exhibit at these opportunities emanated from the Wellington Office of the Department, which collected and despatched the exhibits and generally directed the representation made.

In carrying out the policy of keeping the products of the colony prominently before the consuming markets, special attention is being paid to the supplying of all manner of commercial information relative to the resources of the colony, and further in the interests of producers regular and reliable market reports from the United Kingdom and South Africa are obtained and circulated throughout the colony.

The question of oversea transport of the produce of the colony is a matter which is continually being kept in view by the Department, and on this subject I have to make some important observations. There can be no doubt that in a producing country such as New Zealand undoubtedly is, the question of transport of produce to the different markets is of paramount importance, and I have in my previous reports made a reference to what I considered the high rates of oversea freight ruling on produce exported from New Zealand compared with our neighbours and competitors.

In September, 1903, I approached the shipping companies who hold a contract to carry butter from New Zealand to London at a freight of $\frac{3}{4}$ d. per pound, and drew their attention to the report of an arrangement stated to have been entered into between the Victorian Minister of Agriculture and the White Star line of steamers to carry butter from Melbourne to London and Liverpool at a freight of $\frac{1}{2}$ d. per pound, and pointing out the great importance it was to this colony that Victoria should not have such advantages over New Zealand either in the matter of freight on butter, or in having an extra port of delivery (Liverpool). I was unable to effect a corresponding reduction for New Zealand, principally because the reduction in Victoria proved subsequently to be only temporary. Further developments have taken place this year with the result that Australian shippers have entered into two contracts—one with the White Star, Lund's, and the Aberdeen Lines of steamers at £3 10s. per ton, and the other with the Peninsular

and Oriental, and the Orient Pacific Mail Lines at £3 13s. 4d. per ton. Immediately these contracts were accomplished facts I again communicated with the shipping companies interested in the oversea transport of the colony and asked them to reconsider the question of freight on dairy-produce. I am glad to say that the present contract which has two years to run is to be determined and a new contract is being negotiated at reduced rates of freight. I hope the reduced rate will be satisfactory and consistent with the rates obtaining from Australia, as in these days of keen competition the colony cannot afford to let its competitors have any advantage in the matter of freight if such can possibly be avoided. The question of oversea freight on produce is very important to the well-being of the producers, so much so that in my opinion the most careful supervision should be kept by this Department over all developments, and when the interests of the colony's producers are being inimically affected it should speak with no uncertain sound, and, if necessary, the colony should step in to insure that freights from New Zealand be maintained at reasonable rates.

The subsidised service to South Africa has been carried on regularly during the past year, shipments of produce to a considerable extent having been made. The present contract terminates during October next, and I have no intimation in the meantime from the contractors as to whether it is their intention to continue the service after the termination of the present contract. I have always hoped that with the assistance of the three-years contract and subsidy that the colony's trade with South Africa would have developed to such an extent that the steamship company would have been warranted in continuing the service without any further assistance from the colony. The discontinuation of the service would be a heavy loss to the producers of the colony and to those enterprising traders who have built up trade with South Africa by this opportunity, as it has given them the advantages of a new market.

In these days of keen competition we cannot afford to neglect any available market, however small, and it should be our policy to encourage and promote steam services in every possible direction. One must remember that any diversion of the colony's produce into new markets is followed by a general appreciation of the whole. Compared with our Australian neighbours we are at a great disadvantage in the matter of oversea freights on produce. We are paying in almost every instance from 25 to 50 per cent. more freight, and the reason of it is that their business is competed for by a number of different steamship lines. As shewing what the results of competitive over-sea freights are, one has only to note the growth of the trade from the United States of America to New Zealand during the past five years, which is undoubtedly due to the competitive rates of freights that have prevailed during that period. New York freights have ruled at about 12s. 6d. per ton for all classes of cargo, while rates on similar goods from London to this colony have ranged from 25s. to 60s. per ton. This presents a most undesirable condition of affairs, and militates against the benefits that should be derived under the preferential tariff. The whole question of the rates of freight ruling from New Zealand to London on wool, frozen meats, and dairy produce is of the utmost importance to the colony.

The steam services to and from the west-coast ports of the United Kingdom have developed trade both ways in a most satisfactory manner, and some very large shipments of this colony's produce have been made to markets that have hitherto not been available to New Zealand except by indirect means. As far as one can judge, the time is not far off when the trade promoted by this steam service will assume such dimension as will warrant the contractors supplying a direct service, and not, as at present, *via* South Africa. Should that possibility become an accomplished fact, I look forward with confidence to a still greater increase in the volume of business now being done. The contractors for this service in response to a representation from me to consider the question of freight on butter to the west-coast ports of England signified their intention to reduce the present rate of freight from ¾d. per pound to ½d. per pound. If, in addition to this reduction in freight, direct sailings to the west-coast ports are provided, there seems every probability of a very large share of the export of dairy-produce finding its way out of the colony at greater reduced rates than hitherto prevailed. Should this reduction in freight on butter from the colony to the west-coast ports of the United Kingdom become general it will mean a saving of freight on the colony's output of butter to the extent of £60,000 per annum, and it means placing this colony on the same footing regarding freight on butter as is enjoyed by our Australian neighbours. This is as it should be, as there is no valid reason why this colony should pay any higher rates of freight on produce than those obtaining in Australia.

I am again forced to draw attention to the slowness of the development of our trade with the Far East. The principal drawback to progress being the fact that all the steamship lines trading to and from that part of the world do not extend their services beyond Australia, and with this disadvantage we are unable to compete with Australia, and participate in the trade. There are now several lines of well-equipped steamers running regularly between Australia and Japan, calling at Manila and Hong-kong, and in my opinion as soon as the present excitement in the East is over and business resumes its normal channels, we must make overtures to one or more of these shipping companies to extend their services to this colony. Once we have a line of steamers connecting with the markets of Japan, China, and Manila, I am convinced we shall find a satisfactory outlet for a portion of almost everything this colony produces.

I had hoped to be able, in making this report, to make a satisfactory announcement of the establishment of a steam cargo service to and from the western ports of Canada, but, although both Canada and New Zealand have expressed their willingness to contribute £10,000 per annum each for one year towards the establishment of such a service, nothing of a satisfactory nature has been so far arranged. I am of the opinion that some vigorous policy should be adopted with the object of promoting trade and interchange with Canada. At the present time our annual imports from the United States of America amount in value to £1,528,000, while from Canada and British Columbia our annual imports amount to only £113,000. This discrepancy should not exist, because the manufacturing conditions are much the same in both countries, but the United States of America has the

advantage of direct steam service to this colony from both its eastern and western coasts. I have no hesitation in stating that with a direct steam cargo service to and from Canada, and reasonable freights, a very large increase of trade both ways could be effected.

The commercial agency of the colony in South Africa, under the charge of Mr. J. G. Gow at Durban, has been satisfactorily carried on during the past year. Mr. Gow makes a periodical visit to all the principal commercial centres in South Africa, and his market reports have proved of considerable interest and value to traders and producers.

The Produce Commissioner at London (Mr. H. C. Cameron), and his assistant (Mr. R. H. Hooper) continue to do good work in connection with the London office of the colony. A heavy demand during the past year has been made upon their services in connection with the colony's representation at the Colonial Products Exhibition at Liverpool, and the Indian and Colonial Exhibition held at the Crystal Palace, London, and I have pleasure in expressing my appreciation of their work in connection therewith.

The work of organizing and administering the proposed New Zealand International Exhibition to be held at Christchurch in the summer of 1906-7 has been taken in hand by this Department. This Exhibition will afford a splendid opportunity of showing the possibilities of this colony as one of the world's food-producing factors. No effort will be spared by the Department to assist in placing at this opportunity the commerce and industries of the colony in the most attractive and convincing form possible, and I have no doubt but that the best of results will be achieved.

The question of the marketing of the produce of the colony is one that requires earnest consideration. The prosperity of the colony is so directly bound up in the successful realisation of its produce, that to meet and successfully contend against the competition of more favoured countries steps will be required to be taken in the general interest by which the control and disposition of the colony's produce in the United Kingdom will be confined to one channel. Under the present conditions, the disposal of this colony's produce is in too many hands. This induces competition of which the British buyer takes advantage, with the result that the New Zealand producer suffers, and through him the whole colony. This question, and the matter of freight on produce, as compared with countries whose position is more favourable, will require to be faced very seriously in the future, if this colony's producers are to get the best results from their different industries.

The subject of adulteration of the New Zealand butter has had consideration, and representations have been made to the Imperial Government to introduce legislation with the object of protecting New Zealand butter from being manipulated in this improper manner. To these representations, which were made through the High Commissioner for the colony, a favourable reply has been received. The subject is further referred to in the Produce Commissioner's report.

During the past year I regret to state that the Admiralty have ceased purchasing Westport coal for the supply of the navy on the China Station, the principal reason being the large accumulation of coal at Hongkong in view of possible complications in the Russian-Japanese war. However, recognising the superiority of New Zealand coal, the Admiralty has purchased freely for warships on the Australian Station, some large deliveries at Sydney and Hobart having been effected during the past year. However, I am happy to state that it is reported on good authority that the Admiralty intends at an early date to resume monthly shipments of coal from Westport to the Far East.

The Department has been advised of the appointment of Mr. R. J. Jaffray by the British Board of Trade to carry out a special commercial mission to Australia and New Zealand with a view to examining the position of the colonies' trade with foreign nations as compared with the Mother-country, and to ascertain what steps can be taken in the interests of British manufacturers to preserve the present trade and recover that portion of it which has been lost. This mission will have every attention and assistance that is within the Department's power to extend.

During the Secretary of the Department's (Mr. T. E. Donne) absence representing the colony at the St. Louis Exhibition, and now representing the New Zealand International Exhibition in the United Kingdom and the Continent of Europe, the important duties devolving upon him have been intrusted to Mr. G. S. Munro, Acting-Secretary, whose report with those of Mr. H. C. Cameron, Produce Commissioner at London, and Mr. J. G. Gow, Commercial Agent for the colony in South Africa, are attached, and each will be found to contain valuable information. The work connected with this Department is all of an expert character, requiring as it does an extensive local and general commercial and shipping experience, and when one considers the small staff attached to the Head Office of the Department (three in number), the results may be considered very satisfactory indeed.

SIR,—

Department of Industries and Commerce, Wellington, 1st August, 1905.

I have the honour to submit herewith the Departmental report for the year ended the 31st March, 1905.

The Hon. Sir J. G. Ward, K.C.M.G.,
Minister of Industries and Commerce, Wellington.

G. S. MUNRO, Acting-Secretary.

DURING the past year a very large number of commercial inquiries have been dealt with by the Head Office relative to the productions of the colony and to the markets available for different manufactured goods. Market reports both by cable and letters have been regularly obtained from the United Kingdom and South Africa, and circulated throughout the colony for the benefit of traders and producers. The scope of the weekly cabled market report received from the Agent-General, London, has been very much enlarged, and now includes references to grain, peas, beans, kauri-gum, wool, and hops.

The Agent-General is regularly advised of the particulars of all cargoes of produce shipped from the colony to the United Kingdom.

Representation of the products of the colony was successfully accomplished at the Colonial Products Exhibition held at Liverpool, and at the Indian and Colonial Exhibition held at the Crystal Palace, London. The suggestion to exhibit at these two opportunities emanated from the Head Office of the Department, and all the exhibits of products and manufactures shown at these two exhibitions were collected in the colony and despatched by the Department; at the same time considerable credit is due to the London staff for the enthusiastic and capable manner in which they took the business of these two Exhibitions in hand. Attached are some illustrations showing the creditable display made by the colony at these two opportunities.

SUBSIDISED STEAM SERVICE TO SOUTH AFRICA.

This service has been satisfactorily carried out during the past year, the extent of tonnage placed by the contractors at the disposal of shippers having been ample for all requirements.

I attach a schedule showing the sailing and arrival dates of each steamer, the average duration of voyages, and the quantities of the principal lines of cargo shipped :—

Name of Steamer.	Date of Sailing.	Date of Arrival in South Africa.
Dorset	19 April, 1904	24 May, 1904.
Suffolk	2 June, "	6 July, "
Buteshire	22 June, "	1 August, "
Essex	7 August, "	11 Sept., "
Kent	25 August, "	5 Oct., "
Surrey	5 Oct., "	15 Nov., "
Banffshire	19 Oct., "	28 Nov., "
Oswestry Grange	25 Nov., "	10 Jan., 1905.
Ayrshire	15 Dec., "	28 Jan., "
Suffolk	20 Jan., 1905	3 March, "
Drayton Grange	28 Feb., "	4 April, "
Somerset	23 March, "	1 May, "

Average duration of voyages 39 days.

Total shipments to South Africa by steamers of the service for the year ending the 31st March, 1905, were as follow : 3,430 carcasses lamb, 26,969 carcasses mutton, 142 cases frozen sundries, 28,731 boxes butter, 3,303 crates poultry, 135 crates frozen rabbits, 93 cases frozen fish, 16 cases bacon, 461 boxes boned beef, 614 cases cheese, 932 cases preserved meats, 100 carcasses frozen pork, 23,204 sacks bran, 51,243 sacks oats, 70 sacks oatmeal, 60 casks tallow, 1,965 cases potatoes, 500 sacks potatoes, 313 sacks peas, 28 sacks grass-seed, 87 sacks cocksfoot, 692 sacks barley, 20 sacks rye, 2 sacks beans, 32 cases preserved milk, 6 bales hemp, 40 cases nails, 1,223 superficial feet timber, 54 pieces timber, 965 live sheep, 21 rams, and a quantity of general merchandise

Shipments to Fremantle were as follows : 750 carcasses lambs, 16,802 carcasses mutton, 487 carcasses pork, 75 crates rabbits, 40 quarters beef, 207 cases fish, 25 cases frozen sundries, 1 carcass veal, 2 boxes butter, 345 cases poultry, 30 cases meats, 160 cases preserved milk, 10 sacks potatoes, 100 sacks oats 50 sacks seed, 25 bales hay, 100 live sheep, 242,039 superficial feet timber, 2 horses.

Shipments of frozen mutton to Fremantle have continued of considerable magnitude, and those of timber have increased, but in other directions trade has not developed, owing to the operations of the Shipping Association, which controls the coastal trade of the Commonwealth, and which has made shipping by the contract steamers an act of disloyalty to the Association, involving forfeiture and discontinuance of rebates.

The volume of business with South Africa has not reached the figures of the preceding year, but notwithstanding the adverse influences at work, a considerable extent of trade has been carried on with undoubted benefit to the producers and traders of the colony. While on the subject of the subsidised steam services, I should like to draw attention to the fact that since the inception of the subsidised steam service to South Africa, the steamers of the New Zealand and African Steamship Company have carried from the colony produce to the value of £1,381,631 10s. 4d. to markets which were previously not directly available to the colony, and that during the same period the steamship company referred to has disbursed the sum of £85,028 6s. 3d. at different ports within the colony for port dues, pilotage, light dues, labour, stevedoring, cargo charges, and ship's stores.

STEAM SERVICE TO AND FROM THE WEST-COAST PORTS OF THE UNITED KINGDOM.

There can be no doubt that the existing service is serving a useful purpose, and introducing the products of the colony to markets hitherto untouched. To demonstrate this, it is only necessary to subjoin the particulars of shipments for the year ending the 31st March, 1905 : 206,369 carcasses lamb, 44,646 carcasses mutton, 3,720 boxes butter, 59,638 crates frozen rabbits, 204 packages casings, 1,501 quarters beef, 2,548 boxes frozen boned beef, 12 crates poultry, 24 cases preserved milk, 5 cases cheese,

6,039 cases preserved meats, 25 cases dripping, 182 casks tallow, 352 tins ash, 345,559 superficial feet timber, 337 dumps tow, 2,355 bales hemp, 118 casks fruit-pulp, 85 packages sheep-dip, 68 bundles sheep-skins, 520 pieces timber, 86 bars steel, 79,260 sacks oats, 2,675 sacks bran, 18,304 sacks wheat, 1,975 sacks beans, 2,497 sacks barley, 5,163 sacks peas, 7,682 sacks grass-seed, 466 sacks fescue-seed, 6 sacks rye, 490 sacks pollard, 620 sacks flour, and a quantity of general merchandise.

DEPARTMENTAL EXPENSES.

The expenses incurred in carrying on the Head Office for the year ending the 31st March last amounted to £1,411 8s. 8d., made up as follows:—

	£	s.	d.
Salaries	771	13	4
Clerical assistance	285	12	6
Rent of offices	137	10	0
Travelling expenses and allowances... ..	44	17	6
Contingencies	171	15	4
	<u>£1,411</u>	<u>8</u>	<u>8</u>

The expenses of the South African Agency for the same period amount to £1,444 17s. 9d.:—

	£	s.	d.
Salaries	450	0	0
Clerical assistance	82	17	11
Rent of offices	73	16	0
Travelling expenses and allowances... ..	720	14	2
Contingencies	117	9	8
	<u>£1,444</u>	<u>17</u>	<u>9</u>

The expenses of the Produce Commissioner's office, London, for the same period amount to £796 9s. 11d., made up as follows:—

	£	s.	d.
Salary	400	0	0
Clerical assistance	153	0	0
Contingencies	0	8	9
Travelling expenses and allowances... ..	243	1	2
	<u>£796</u>	<u>9</u>	<u>11</u>

SIR,—

Department of Industries and Commerce, Durban, 8th April, 1905.

In submitting my second annual report, I have the honour to state that, although the hopes of the more sanguine have not been realised, and although in some quarters the depression is still very heavy, there seems to be little doubt that the tide has turned slightly towards the flood so far as trade in South Africa is concerned. There has all along been good trade, but not so much with the outside world. A few years ago the imports were enormous, and then the subsequent flooding of the market with excess Imperial stores at absolutely ruinous prices left all the ill effects of a boom. As money had to be obtained somehow, stocks had to be sacrificed in a mad fashion. The effect of the disposal of Imperial stores is not yet over, as may be inferred from the fact that at the present moment canned provisions can be bought in retail stores in perfect condition at less than original cost. The large number of compromises with creditors and insolvencies indicate a clearing-up of the *débris* of the past, rather than present disaster, and will undoubtedly leave business in a healthier condition and upon a sounder basis. Enormous profits must have been made in Durban during recent years, for during the past seven years the town has been practically rebuilt. A great deal of the depression was undoubtedly due to over-speculation. Peace was looked upon as the herald of immediate and unbounded prosperity. Numerous land booms were launched; these took up all the available cash; the first deposit was paid, and a few subsequent instalments; then bad times came to the many; they had nothing to fall back upon, and the land reverted to those who had sold it. The result was ruin to those who make prosperity in trade by spending, for it is the spender, not the hoarder, who makes trade. In spite of the outcry the banks have made profits enough to put up palatial buildings; then pay a dividend of not less than 14 per cent., and carry a large surplus to the reserve fund. At the present moment there are hundreds of houses and offices to let in Durban, but the rents asked are not yet down to normal prices; an indication, perhaps, that things are not really so bad as they are painted. There are not wanting those in South Africa who maintain that the depression is more artificial than real, and that there are ulterior purposes to be served in keeping the market depressed. In Natal, the Colonial Treasurer proposes to retrench the salaries of the Civil servants; some years ago the Government gave the Civil servants a bonus; this was afterwards made permanent as an increased salary. In consequence of the pressure on the Treasury a reduction to that amount is proposed, and as strongly opposed; indeed, some think the position of the Government is threatened by the proposal. The Parliament is now in session.

TOURS.

Three times since my last report have I visited the principal towns of South Africa ; on each occasion I was kept so busy that I began to realise that, if there was anything of the nature of a holiday, it was at Durban in my office hard at work. In June, 1904, on my visit to Johannesburg, I had an interview with Lord Milner, the Hon. — Duncan, and Sir A. Lawley ; Sir H. Wilson, O.R.C., was unavoidably absent. The main question under discussion was the supply of meat. I pointed out to him that, whilst in many instances the colonies of the Southern Hemisphere could supply as well as any part of the world, in many respects they could come before any other parts. On the other hand I urged that the claims of the colonies as being parts of the Empire were to be considered ; and that even if the South African producers felt that there must be a tax upon imported meat, the British colonies should have the preference. Lord Milner expressed himself very strongly in favour of preference, but he was strongly opposed to any measure which would have a tendency to increase the cost of living. I do not think the question of the cost of living need be taken into consideration in considering the question of taxing the meat, for with all that is said about local supplies, meat is no cheaper now than when there was a tax of 2d. per pound. I also had an interview with Mr. Jagger, M.L.A., one of the most prominent and influential men in the country. I interviewed him in his capacity as Chairman of the Congress of the Chambers of Commerce. He expressed himself strongly against the formation of any meat ring in South Africa. Mr. W. Hosken, M.L.C., expressed himself in the same manner, and being a man of progressive ideas, and having a great deal of influence, we may rely upon an extension of the same feeling. The Hon. J. G. Walton, Treasurer-General of the Cape Colony, was also opposed to any movement connected with or involving an increase in the cost of living. He also expressed himself in favour of reciprocity, and suggested that New Zealand might introduce some measure of reciprocity with Cape Colony. As the Cape exports little besides wines (the Transvaal might export tobacco) the advantage of a reciprocity measure would be all on the New Zealand side. In this connection I interviewed specially the Premier of Natal, also Mr. McLarty, M.L.A., the latter gentleman well up in New Zealand affairs. Both gentlemen were in sympathy with preference for the colonies, but thought a general tax might have to be imposed ; they could do nothing, however, without first consulting the other colonies in consequence of the Customs Convention. A motion has just been introduced into the Cape Parliament aiming to reimpose the meat-tax ; this the Government opposes. A proposal of a similar nature has been tabled in the Natal Parliament. It is estimated in Natal that something like £80,000 can be raised in that way, as during the past year the consumption of imported meat has reached 19,367,809 lb. There is a strong feeling on the part of the country members in favour of a tax. It has been freely stated, and as freely denied, that the colony can supply its own beef ; but there does not seem much actual evidence at present, and the price is very high. In this connection it may be mentioned that local firms have very strong interests in the Argentine.

In September I again took a trip round, calling at East London and Port Elizabeth on my way down. In spite of the depression these ports are in evidence as to local progress, and considering the enormous back country of each, the enterprise seems justified. It was my intention to have interviewed Dr. Jameson, Premier, and Dr. Smart, Minister for Railways, on this occasion, but both were so much occupied with the Royal visit that nothing short of the "Wonderland" itself could have secured their attention. However, I made the best of the misfortune and discussed timber matters with the Chief Storekeeper—the man who has the information. At Bloemfontein, I met the Commissioner for Lands, and the Superintendent of the Government Experimental Farms, both intelligent and progressive men. We spent a good deal of time in discussing the relative merits of the countries in which we were mutually interested ; they were much interested in our products, and promised at the earliest date to give our seeds a chance. As the finances of the O.R.C. are reported to be in a good condition, and some enterprising men have done a good deal of business with New Zealand in the matter of stock, we may stand a fair chance of getting our share of business. Of course, Bloemfontein is but a small place, but the colony has a good deal of progressive feeling, and where this will not act as a sentiment, perhaps the chance of a fuller purse will.

In January of the present year I managed to secure an interview with Dr. Jameson, and with Dr. Smart at the Cape. We discussed the question of Preference between the colonies, and there seemed to be but one feeling. At the request of the Premier I visited the Government Wine Farm at Constantia. We also discussed the question of New Zealand coal ; the Cape Government is willing to give the Westport coal a trial, and they gave an order to send 100 tons, which was thought to be enough as a test.

Early in March I paid a flying visit to Johannesburg in consequence of correspondence ; it seemed better that I should have a personal consultation with the merchants, and thanks to the General Manager of the Natal Government Railways, Sir D. Hunter, and to the General Manager of the C.S.A.R., I was able to travel free of expense. On the occasion of these visits my invariable practice is to send a notice ahead to the leading newspapers, giving the local address, for the benefit of those who may wish to see me ; the advertisement is always effective. A recent interview published in one of the Cape papers attracted a good deal of attention, and gave rise to considerable correspondence from those who desired fuller information.

I also paid a visit to Pretoria at the request of Mr. Macdonald, the editor of "Agriculture within the Empire," being the Report of the Boer Delegates on the Stock-farming of Canada, Australia, and New Zealand. He wished me to assist him in connection with corrections ; my name appears in the preface as one of the persons who had assisted. One paragraph which I considered important to New Zealand had been scored out by the Minister, but after some pressure on my part it was reincluded (inclosed).

COLD-STORAGE.

Cold-storage, which at one time promised to be an El Dorado, and into which many New Zealanders were anxious to put their money, is in by no means a flourishing condition. Many of the best plants are lying idle, and the shares are worth so little that in some cases I fear shareholders would be glad to give them away. Huge sums have been sunk in these ventures. No more need be said to prove that the New Zealand Government is to be commended for its caution in connection with this matter at a time when almost pressure was tried to induce it to secure cold-storage in South Africa. Federals and Imperials can be bought at 10s. and 10s. 6d. respectively.

BRAN.

In the past there has been small demand for outside bran. In consequence of the German war in West Africa, the Germans are buying up large amounts of bran in Cape Town. The Transvaal buyers have now to draw their supplies from Durban. Whilst the war continues the demand will probably be the same.

TIMBER.

This is a matter of great importance to both countries, and, during the year I have been able to gain good insight and much information of the Trade. The samples sent to Johannesburg are serving a good purpose as a local advertisement. As might have been anticipated from the demand on the one hand and the small local supply on the other, the trade in timber is a large one, and will in all probability so continue. But it must be remembered that quality is not in all cases the first consideration, perhaps because many of the structures are intended for a temporary purpose only. Price is generally the first consideration, except where a special class of wood is absolutely necessary. New Zealand prices have made against the trade. Enormous stocks from the Baltic prevented anything like large orders from other countries. So far as the quality goes in the matter of the timbers suited to this climate, there is no fault to find with the New Zealand product; but, first, labour being so costly, there is little chance of the finer kinds being worked up, and, besides, so much cheap furniture comes in from other parts. The New Zealand freights are also too high. The samples I had made into office-furniture are much admired as furniture, as they were much admired by the wood-workers. With regard to sleepers, the Chief Engineer of the C.S.A.R. made an application for particulars in detail, so as to be able to form an opinion; the Manager of the Timber Department, Cape Town, also sought information re our timbers. Kauri-pine has of course established itself, and, if we can send suitable sleepers, we may do a good business in that matter also.

SHIPPING.

There have been many improvements in connection with the shipping between New Zealand and South Africa, as there have been many improvements locally. During the past year such improvements have been made in Durban that the very largest vessels of the Union-Castle Company—that is, 13,000 tons—can now come right up to the wharf.

I think the New Zealand Government are to be congratulated upon the attention they have paid to this matter. The Department of Commerce and Industries has been quick to respond to any suggestions for the improvement of matters; the latest being the cabling of the times of loading at New Zealand ports; this is very much appreciated by the importers generally. In June, 1904, the s.s. "Devon" landed 200 sheep and twenty rams in excellent condition, and the management of the matter called forth considerable commendation. In July, the s.s. "Suffolk" brought good cargo and landed her stock in very good condition without mortality. The s.s. "Buteshire" put out her cargo in such excellent condition that I did not hear a single complaint, although some complained that their goods had been left behind whilst the steamer had taken in cargo at Australian ports; I explained that the company had a right to reserve space for Australian cargo. In November the s.s. "Surrey" landed her cargo well. Her poultry was an excellent sample, and evoked the highest praise. The s.s. "Banfishire" brought over a fine lot of sheep under the care of Mr. McColl; the loss was less than 1 per cent.; these sheep were intended for Mombasa. The arrangement by which the importers can know the date of loading will, I have no doubt, help to facilitate trade. In connection with shipping, I should like to call attention to the necessity of making Delagoa Bay a port of call for the delivery of our produce. The Rand trade is fast going in that direction, and the Rand interests are so extensive there, that it is not at all likely that the port will be overlooked or allowed to go down. The Transvaal Government will require a certain portion of next year's oats to be delivered *via* Delagoa Bay. The attached figures, supplied to me by the Portuguese Consul, Captain J. B. Rosa, will give some idea of the trade with Delagoa Bay. When I was at the Cape, I met Mr. Rose, the travelling representative of the New Zealand and South African Shipping Company, and discussed the question of the steamers calling at Delagoa Bay; he fully recognised the importance of the matter, and promised to bring it before the directors.

BUTTER.

It seems almost superfluous to say that butter from New Zealand has made very satisfactory headway in South Africa. Such complaints as were made at the outset may have been more or less inevitable, still, matters, as referred to by Mr. Kinsella in his report, created a very great prejudice. I do not think the present position of New Zealand butter can be attributed to any accident, but to sheer merit. Twelve months ago in many places the Argentine and Victorian product was much more in evidence than our own; to-day, the inquiry is much more for our own, and the merchants maintain

that it will be solely the exporters' fault if the position is not maintained. Shipments have arrived in the best condition, whilst the Peninsula and Taieri brands have made a name for themselves.

MUTTON.

There is nothing more to be desired on the score of quality of the New Zealand mutton ; if any tendency needs checking, it is in the way of excessive fat ; people here do not like fat mutton, and there is little consumption for tallow. This is not meant to convey the idea that poor mutton is wanted. Nice carcasses about 45 lb. to 50 lb. are best suited, and, of course, at the local price. Retail prices are all high, but that is no criterion as to the purchasing-price on the other side. In this matter it may be mentioned that a good number of New Zealand sheep have been imported for stock purposes during the past year, and, from reports received, are doing well. The O.R.C., and some parts of the Transvaal are well suited to sheep-farming ; and the New Zealand sheep seem to be well adapted.

POULTRY.

South Africa offers a good market for good poultry, and almost every exporting country sends poultry here, hence the competition is very keen. All that other countries do seems to be done with the idea of capturing the market ; they carefully study the appearance of the birds in the boxes, and not merely the taste on the table. Sometimes New Zealand exporters have failed in these very particulars. The size has been irregular, and old birds have been mixed with young ones ; sometimes they have presented a messy appearance, and this immediately lowers the price. I do not understand why New Zealand should not be able to equal any other country in these particulars. The samples sent during the year immediately past have proved the ability. Local productions are poor, and this for many reasons. A large quantity is reared by Indian coolies and Kaffirs, and, in the majority of cases, these are only put on the market when they are too old for laying purposes, or when they are diseased. Disease is very prevalent here amongst poultry. Two importers have recently complained to me that they have spent as much as £6 in cables to New Zealand, but cannot get quotations. This is annoying and injurious to trade.

OATS.

In connection with oats, South Africa offers an excellent market for an excellent New Zealand product, as the Imperial troops are not to be immediately withdrawn the demand will continue about the same. Here, also, the very greatest care must be exercised ; the " anything-will-do policy " is a huge mistake. Horseflesh is a very ticklish article in consequence of what is known as horse-sickness. Even with the very best food a horse is a risky investment. During the year, New Zealand has sent over some excellent parcels of oats, and these have given great satisfaction.

COAL.

Coal is a very important article of trade here. There is very little other fuel in the country, Natal has a good supply and very great efforts are being put forth to make the most of the local deposits. There is good coal in Zululand, and fine deposits in the Transvaal. I have not succeeded in doing business for New Zealand beyond the small parcel for the Cape Government. The price £1 6s. 6d. c.i.f. is not a very tempting one, and must leave a very small, if any, margin. This order could not be executed.

LITERATURE.

I have been much assisted in my work by the liberal supply of literature dealing with New Zealand in its various aspects sent to me during the year. The applications have been quite as numerous as my supplies would enable me to meet. Farmers who have capital at command, which they do not care to longer retain in this land of uncertainties, and are disposed to leave for New Zealand, are the most numerous applicants, and the majority of these are from the Orange River Colony and Transvaal. Public libraries have also requested me to supply them with all the literature at my disposal. Among the latest applications have come one from New York State, and another from Hamburg, Germany. Some of this may be explained from the frequent Press notices : many of the local articles are adverse ; these call forth rejoinders and the consequent demand for information at first hand. In this connection I may mention that Mr. Maurice Evans, G.M.G., who lately visited New Zealand, has been lecturing in an appreciative manner upon his travels in New Zealand ; the effect of this will be to call attention, as he is a well known and considered a most reliable man. Many persons have left South Africa during the year for the purpose of settling in New Zealand ; others are contemplating that step. I have before me now a request for information from a person who wishes to take up a considerable quantity of land.

SAMPLES.

If there are any would-be exporters in New Zealand who are not in any way represented here, if they would send me a range of samples of what they have to sell, I would endeavour to place the samples in the hands of reliable agents ; in this way, perhaps, more trade could be done.

CAPE TOWN EXHIBITION.

I was in Cape Town during the time the Exhibition was on there. As I thought I might have an opportunity of specially advertising New Zealand I made frequent visits and interested myself in the various exhibits there. This gave me opportunities which I could not otherwise have had of giving hints about what might in the near future take place in New Zealand. Exhibitors were eager for such information as I could give. I cannot say that I was very much impressed with the exhibition ; perhaps I expected too much. At the same time one cannot help being impressed with the feeling that these exhibitions serve a very good purpose, even if they only bring out mutual rivalry.

RABBITS.

There is a very reasonable consumption of rabbits in South Africa, in the main of course from Australia, and, compared with the price of butchers' meat, they cannot be called expensive at the price at which they are sold. The New Zealand article is superior to that brought from Australia, so much so that, if the New-Zealanders can only export the quantity, and at the price, they could bid well for the whole market. I commend the suggestion to the exporters of this article in New Zealand.

CRITICISM.

I notice the *Auckland Weekly News* takes the matter to heart that there is no agent in South Africa empowered "to make such business arrangements for our exporters as would best conduce to their profit and advantage." I may point out that the Commercial Agent was sent here to give and to collect information, and to as far as possible foster trade without in any way trading or encroaching upon the scope of traders. As far as lies in my power in the future I shall do what I can to carry out the work which my superiors may issue for me. The New Zealand Agent might trade in South Africa if it were so desired both directly and as a mediary; that, however, does not come within the scope of the Agent at present.

In conclusion, I may mention that as I have travelled through the country I have been much impressed by the evident changes. During my first journeys in this country one might go for many miles along the railway and not see a beast, now the uplands seem to be well stocked with cattle. In the matter of mutton, however, things are different. Sheep do not for some reason seem to do well in many parts. I would urge upon New-Zealanders the importance of keeping to the best quality in all classes of exports, and to be satisfied with a fair margin of profit; in this way they may find a good and constant market. The general aspect of things is said to be improving slowly, though in many parts there is an excess of white labour and frequent meetings of the "unemployed," many of them ex-irregulars who stayed in the country in hope of work. Although eighteen months ago there was said to be little Kaffir labour available for the mines, every month reports a large increase. On the Rand things are kept merry by the constant and serious riots of the Chinese. It is hoped that matters will soon assume more of the normal form and that all parts will share in the prosperity which all need.

I am, &c.,

J. GRAHAM GOW.

The Hon. Sir J. G. Ward, K.C.M.G., Minister of Industries and Commerce, Wellington, New Zealand.

COLONIAL PRODUCTS EXHIBITION, LIVERPOOL.

SIR,—

Westminster Chambers, 13, Victoria St., London, S.W., 28th January, 1905.

The Liverpool Colonial Products Exhibition having been brought to a close last week, I now have the honour to submit a report concerning it.

The first Exhibition under the same name and management, held last year, was mainly a traders' show. This year the Exhibition, as regards the display, possessed a distinctly official character, the following colonial Governments being represented: New Zealand, Victoria Canada, Newfoundland, and Southern Nigeria, while the British South Africa Company exhibited for Rhodesia. A semi-official exhibit was that of the British Cotton-growing Association, which showed cotton from the West African, East African, and West Indian colonies. Cotton-ginning machines were also exhibited. There were good trade shows of general products of the West Indies and West Africa, with which Liverpool has especially close commercial relations. The Riverside Cold-storage Company, of Liverpool, made a very comprehensive display of refrigerated produce handled by them from New Zealand, Australia, and Canada. Sundry minor trade exhibits completed the catalogue.

Preparation for the opening of the Exhibition was performed under difficult conditions. To have everything in readiness, so far as possible, I went down to Liverpool on Friday, the 6th instant, and Mr. Hooper followed on Sunday, the 8th. Admittance to St. George's Hall was only given on Monday morning, the 9th instant, there being thus barely thirty hours in which to erect stands, unpack goods, make the display, and attend to the hundred and one things incidental to an undertaking of this kind. However, by continuous work, the task was accomplished. Anxiety was caused by the late arrival from London of the Mosgiel rugs and blankets, these goods being depended on to complete the scheme of dressing the stand. They were only received about an hour before the opening of the Exhibition, the delay having been mainly caused by difficulty on the part of the shipping company in promptly identifying the cases, which were not marked with any indication of the contents. On future occasions it would much facilitate matters if all packages were clearly marked with the name of the exhibits contained in them.

The photographs, which are being forwarded to the Industries and Commerce Department by this mail, give a good picture of the main part of the New Zealand stand, though they do not show the displays of meat, timber, and hemp. Dairy-produce was made the central feature in trophy form, and I may here express my satisfaction at the excellent get-up of the butter-boxes, which arrived in perfect condition owing to careful outer packing. On the other hand, more than half the crates of cheese had been despatched without such protection, in consequence of which the packages had become soiled and could not be shown. The factories concerned thus lost a good advertisement for their brands, as the cheese had to be shown uncased. All the clean crates were duly displayed. The quality of the butter and cheese was very highly spoken of by local traders and others visiting the show. Useful co-operation was afforded

in this section by Messrs. George Wall and Co. (Limited), Messrs. Lovell and Christmas (Limited), and Messrs. Pearson and Rutter (Limited), who supplied open boxes of butter on alternative days of similar brands to those displayed in the trophy.

The grain and seed exhibits were displayed as well as might be in the circumstances. The seeds in particular, such as the clovers, attracted the attention and admiration of representatives of several seed-firms. The peas, likewise, aroused interest among traders handling these goods for consumption, and the grain came in for a full share of notice. On future occasions grain and seeds will be set out to better advantage by displaying them in small bags. There was not time in the present instance to make the most of this exhibit.

The frozen meat was displayed in a specially prepared division of the stand. There being no refrigeration available, only three carcasses of mutton and four of lamb were hung at any one time. These were changed every other day for a fresh lot, and the good appearance of the exhibit was thus maintained. As all the sheep and lambs forwarded from the colony were of the Christchurch Meat Company's brands, I arranged with that company's London manager for their Liverpool representative to give personal attention to this section of the exhibits. This proved of considerable assistance on occasions when, for instance, the Exhibition was crowded. The Christchurch Meat Company also showed a good assortment of tinned meats, tallows, &c. The meat section was embellished by framed pictures of the various freezing-works of the company. It may be mentioned that the lambs sent Home were rather too large to show to advantage alongside the sheep. I recognise, however, that owing to the time of year it was somewhat difficult to supply small carcasses of lamb.

The kauri-gum and fleece wool were attractively displayed in glass show-cases, and aroused much interest, as did also a specially loaned specimen-case from the Christchurch Meat Company showing all stages of New Zealand wool from the fleece to the manufactured cloth. The bales of hemp attracted constant attention and inquiries. The collection of timbers was well examined by traders and other experts, and, as previously mentioned, business will probably result by the direct steam service. Unfortunately, owing to the late arrival of the timber exhibit, it was impossible to get the woods polished prior to exhibition as intended.

The stand generally was much embellished by the display of handsome framed photographs of New Zealand scenery, taken for the occasion from the Imperial Institute. The pictures were from among those recently sent Home by the Tourist Department.

Practically all the literature supplied from the colony was distributed, and in certain lines an increased quantity could have been disposed of to advantage. For the next occasion of the sort it would be well to have a good supply of booklets or leaflets embodying concisely, in attractive form, the leading features of New Zealand as a field for settlement, agriculturally and industrially, together with State institutions, popular legislation, scenic attractions, climatic advantages, &c. The well-got-up sheet issued by the Tourist Department (of which there were only a few available for Liverpool) comes nearer to this than anything else we have had; but for promoting emigration to the colony, the agricultural and industrial side should naturally be given the greatest prominence. The Emigrants' Information pamphlet, while admirably filling its own special purpose, is somewhat too lengthy and dry for general and wide distribution. Other leaflet matter available lacks comprehensiveness. I need hardly say that the Christmas numbers of the New Zealand weekly journals supplied for Liverpool were eagerly taken by visitors, and will doubtless make a good indirect return on the outlay. They were of course distributed judiciously.

Every attention was paid to visitors at the New Zealand stand, in the way of imparting information concerning the colony and its resources. We aimed to inform and influence both traders and consumers, and those contemplating emigration. The reduced-fare system was kept well to the fore, with evident good effect.

Opportunity was taken of the interest displayed by visitors to the Exhibition to deliver a couple of lectures on the resources of New Zealand. The first was made to include points of interest to those concerned in trade, such as the manufacture and grading of dairy-produce, and particulars affecting the frozen-meat industry; while the second was specially adapted for settlers and tourists. I am pleased to say that both of these lectures were very well received, and I am satisfied that they have proved of great benefit. On the occasion of the second lecture, notwithstanding the large size of the Court where it was delivered, there was unfortunately not sufficient accommodation for all who desired to be present. New Zealand, I may say, was the only colony on whose behalf advantage was taken of the grand opportunity afforded by the Exhibition to direct especial attention to it by means of lectures.

Drawing comparisons between the various colonial displays, Victoria was the only colony really on all-fours with New Zealand. It may be said without any fear of contradiction that New Zealand showed up far ahead of its Australian neighbour. Canada made a great feature of fruit, in which line New Zealand had nothing to show. At the present time of year it is of course impossible to make a good exhibition of Southern Hemisphere apples, and as their export from New Zealand amounts to so little, the deficiency was more apparent than real. The latter remark applies also to canned and bottled fruits. Other lines lacking at Liverpool, and desirable to have for the Crystal Palace, are being dealt with in a special despatch relating to the latter Exhibition. It may be here noted that there were very fine exhibits of timbers from West Africa at Liverpool. From a general point of view, the New Zealand stand compared favourably with any other in the hall, not even excepting the Canadian exhibit.

With respect to the matter of awards referred to in my last interim report, no action has been taken by the management of the Exhibition. This is somewhat disappointing, and must be attributed to the fact of the Exhibition being organized by private enterprise. It may now also be definitely

stated for the information of the dairy factories concerned that no competition took place in their or any other line of produce.

A summary of the chief proceedings in connection with the Exhibition may here be worth record. The opening ceremony was performed on the 10th instant by the Lord Mayor of Liverpool, with Sir Alfred Jones, President of the Exhibition, in the chair. On the 12th the Exhibition was visited by Mr. and Mrs. Chamberlain, accompanied by Lord Derby and party. I was able to show Mr. Chamberlain over our stand, and point out all the leading features of New Zealand production. I also took the occasion to present him with a Mosgiel travelling-rug on behalf of the Premier, as a souvenir of the Exhibition. The right honourable gentleman expressed his great interest in the colony, and admiration of the rug as a sample of the quality of its manufactures. On the 14th the High Commissioner for Canada, Lord Strathcona, attended the Exhibition, and gave an address in connection with the "re-opening" proceedings. On the 16th a similar function was performed by the Bishop of Liverpool, while your own visit and address took place on the 18th. On the closing day, the 19th instant, the formal proceedings took the shape of short addresses by the representatives of the colonial Governments exhibiting. The organ balcony, it may be noted, made an excellent rostrum for addressing the public in the hall. Particulars of the above proceedings, and of the Exhibition generally, will be found in the set of news-cuttings attached hereto.

The attendance of the general public, which had been rather disappointing during the first days of the Exhibition, improved steadily, and for the last days the hall was crowded. This was doubtless largely due to the reduction of the entrance money to 6d., also to the fact that the Exhibition had begun to advertise itself. The ordinary newspaper advertisements and small wall posters employed by the management did not in themselves appear to attract all the attention required. However, that may be, the Exhibition would probably have continued to draw well for another week had it been possible to keep it open. The hall, however, was required for other purposes. While the extensive official representation at the Exhibition lent it considerable additional importance, it must be admitted that as a privately organized and managed concern it could hardly enjoy the prestige of an exhibition held under public auspices. This factor must be considered in connection with the question of support accorded by the general public and interests such as the mercantile community.

At the close of the Exhibition only one day was allowed to remove all stands, exhibits, &c., from the hall. We therefore commenced taking-down and packing operations immediately after the close, at 10 o'clock Thursday night, the 19th instant. Work went on all night, and on the afternoon of Friday, the 20th, everything was despatched to destination—the Crystal Palace, the Imperial Institute, this office, and local sale respectively.

The butter and cheese have been disposed of in accordance with the instructions received from the Department of Industries and Commerce at Wellington. The frozen meat was taken over by the Riverside Cold-storage Company, and the hemp was also sold. Account sales for these goods, together with net proceeds realised, have been handed to the accountant's department, and will go forward to Wellington in due course.

Summing up, I am satisfied that in the Liverpool Colonial Products Exhibition, New Zealand obtained a substantial and valuable advertisement. Not only were its leading products brought under the notice of traders and consumers at this end, but the merits of the colony as a field for settlement and travel were well impressed on the public. These objects, when compared with the expenditure incurred by some of the other colonies—Canada and Rhodesia, for instance—were attained, I am pleased to say, at a comparatively small cost to New Zealand.—I have, &c.,

The Agent-General for New Zealand, London.

H. C. CAMERON,
Produce Commissioner.

Westminster Chambers, 13, Victoria Street, London, S.W., 28th April, 1905.

SIR,—

In submitting a report of the work carried on by this Department for the past twelve months, I beg to direct your attention to the increased duties now performed as compared with those undertaken a few years ago. Whereas then dairy-produce was almost the sole industry to which attention was devoted, now nearly every line of produce exported from the colony receives considerable supervision. The following list of subjects dealt with during the year will give a good idea of the extent and variety of the work of the Department: dairy-produce, frozen meat, wool, hemp, grain, cocksfoot-seed, kauri-gum, hops, apples, fruit-pulp, and feathers. These have all been dealt with. As in former years, cables have been despatched each week to Wellington giving quotations and market information concerning various specified lines, but in addition to these cables giving particulars concerning wheat, oats, beans, peas, and kauri-gum, have been forwarded periodically. Reports on subjects such as cool-curing of cheese, proper temperatures for cheese on board ship during voyage, hemp-grading, west-coast shipments, Smithfield Market by-laws, advertising by demonstration at trade exhibitions, condemned New Zealand mutton, fraudulent meat-sales, &c., have been made. Advertising the resources of the colony by means of lectures when opportunity occurred has not been lost sight of. During the year six lectures illustrated by limelight views were given. Three of these were on New Zealand as a field for settler and tourist, and three on the resources of the colony. These lectures proved highly successful, being attended by very large audiences and favourably commented on in Press notices. They proved an effective means of creating considerable interest in the colony throughout this country. If possible, it will be advisable to develop the lecturing branch of this Department.

During the year, Mr. Kinsella, Dairy Commissioner, paid a visit to this country, and along with him I visited the various centres chiefly interested in the distribution of New Zealand produce. Visits were also paid to the west-coast ports, at which the steamers employed in the new direct west-coast service discharge cargo, in order to watch the method of distribution and to assist as far as possible in the advancement of the direct trade.

DAIRY PRODUCE.

Butter.

At the close of last official year the market for New Zealand butter was in a very unsatisfactory condition. Holders of stocks then were nervous and were forcing sales, while trade all round was depressed. The average quotation for choice brands was 90s. per hundredweight at the end of March, 1904. During April prices receded still further, until, in the middle of May, the lowest point—84s. per hundredweight—was reached. From then values gradually rose. This season has been a much better one for the sale of New Zealand butter. Prices have been high throughout. Instead of the market, as is generally the case, suffering a decline after Christmas, values have steadily increased until, at the end of March, the highest price for the season—108s. per hundredweight—was realised.

In former years, when prices for colonial butter dropped to such a figure as ruled at the close of last New Zealand butter season, speculators were usually found ready to purchase stocks in order to place them in cold-store and hold them there until autumn, on the chance of securing a good profit on their undertaking. The enormous supplies received at that time, however, prevented this element of speculation becoming a feature of the market to any extent. Every one then was afraid of the future. No one ventured to prophesy the state of the market about September or October. Later on, however, when the impression among buyers became general that the bottom had been reached—viz., £4 4s.—speculative buying for holding in store became general.

Taken as a whole, the season for New Zealand butter last year could not be regarded as a satisfactory one from a shipper's point of view. Prices having been low on the market almost from the commencement of the season, returns from shipments could not but have proved very disappointing. The enormous competition between selling-agents, who appeared to have little, if any, combination for the disposal of stocks, was severely felt. The heavily increased supplies received did somewhat to bring about low prices, but I am strongly of belief, as I have previously pointed out, that had a better system of distribution than existed been introduced by those interested in the success of the dairy industry in New Zealand, much better results might have been obtained. On the other hand, from the New Zealand butter-makers' point of view, the test of the New Zealand butter on the British market must be considered most successful. It has often been said that when trade is bad, and especially when supplies are heavy and prices are steadily receding, as was the case at that time, faults would be found, and complaints made, which in a good or ordinary season might be overlooked. There had not been a season for many years in which the conditions of the market were such as to induce fault-finding and complaining so bad as then. And yet, although I made continual and extended inquiry for faults, especially for "fishiness," in scarcely any case did I hear complaints. A few faults were, of course, met with, but on inquiry into the facts, I found them so slight as to be hardly worth noticing. Every one speaks most highly of the quality of New Zealand butter, which has been maintained at the high level which it was acknowledged in the trade to have attained last year.

Fortunately, the season now ruling for New Zealand butter has been much better than last one. About the month of October a firmness in the market was noticeable. The advance was most marked in the finest grades, such as Danish, which, from 114s. at the end of August, rose steadily each week until, at the end of September, it was realising 122s. per cwt. Winter-made Australian butter, small shipments of which commenced to arrive about that time, participated in the advance. New Zealand butter that had been held in cold-air store realised 99s. on the average for the best quality, and this price hardly varied for some weeks.

While the market was in this satisfactory, steady condition, however, buyers, while operating freely for immediate requirements, did not display any keenness to make forward purchases. Considerable uneasiness existed as to what the future might be. While it was acknowledged by many that Continental supplies were likely to remain in small compass, and that receipts from all other sources but colonial were likely to be curtailed, a strong opinion existed that the supply to be received from Australia would be large, and would to a very great extent prove an influence in keeping the market values low. Shipments from New Zealand, it was anticipated, would again show an increase, while the Argentine was looked upon as likely to supply a larger quantity than formerly. Business was also curtailed by the recollection of considerable losses made by numerous small retailers throughout the country in the contracts they had made with wholesale houses for their weekly requirements during the season. That experience was not such as to entice renewed speculation on the part of those retailers, and a strong feeling prevailed throughout the country to take the risk of the market and only purchase at the price for the day. It was, naturally, very difficult to forecast the prospects of this season for New Zealand butter. At the beginning of the season, the only opinion I was able to give as a guide to the producers in the colony was that the net average price that might be expected to be realised for this season's shipments of New Zealand butter would be about 9½d. per pound, f.o.b. As I have said, there was no satisfactory data to go upon to warrant me in making any more definite forecast, and my estimate of 9½d. will prove rather under the net returns.

The first arrival of New Zealand butter of the make for the season 1904-5, was that by the s.s. "Papanui," which reached London on the 15th November, and this realised 102s. to 104s. per hundredweight. Regularly fortnightly shipments have come to hand since then, and prices have been exceptionally good throughout, rising steadily, as I have already said, to 108s. per hundredweight.

There has this year been a considerable falling-off in the quantity of butter received from the Continent, which has naturally been of the greatest advantage to the sale of the increased shipments that have been coming from New Zealand.

There are buyers of New Zealand butter who are so highly satisfied with the quality of the brands they have been handling, and whose customers are so pleased with it that they are desirous of obtaining supplies all the year round. That steps should be taken by producers in the colony to attain to supplying this demand, I consider advisable. The fact of New Zealand butter being placed regularly on the market all the year round, as is the case with Danish, would be, I believe, an important point gained in the attempt to realise prices approximating those of the latter description. I am sorry, however, to find that some of the factory directors in New Zealand apparently do not consider this material, for I noticed last season that some consignments, arriving subsequent to March shipments, when the New Zealand contract season ended, were sent to agents other than those who had been handling these brands throughout the season. This may have been done for immediate gain, but I maintain that it is bad policy for the producers to adopt if they wish to get their brands firmly established with a good report on the market here. No agent can be expected to push and work up a reputation for any factory's butter if he may feel he is likely to lose the control of it immediately he has secured a good outlet for it

Butter-adulteration.

Owing to the falling-off in the quantity of butter received from the Continent, various methods to fill the gap have been resorted to by traders. The extension of the practice of using New Zealand and Australian butters for blending and adulterating, so as to produce an article that can be placed on the market at a lower price, to which attention was drawn by me in reports a few years ago, is being complained of more than ever. Factories have been opened in various places, one in London employing 250 people, for the purpose of manipulating colonial butter with butters of inferior quality, and with condensed milk. This mixture is then made up in rolls and sold under fancy brands. A good deal of colonial butter has been going to the Continent, where, as is known, it is mixed with about 20 per cent. of margarine and 10 per cent. of coseine. The mixture is then returned to this country, and sold in Wales and the Midlands in large quantities at lower prices, of course, than is obtained for genuine butter. Representations have been made to the British Government concerning the growth of the practice, and there is likelihood of a departmental committee being appointed to inquire into the whole matter. The assistance of this Department is being given to the Board of Agriculture in the interests of New Zealand producers to stop, if possible, this new and pernicious trade.

Cheese.

At the close of the official year twelve months ago the market for New Zealand cheese was showing signs of weakness and prices were steadily declining. Stocks at that time were considered heavy, and retailers were not anxious purchasers. The decline in values continued until the middle of May, when a slight steadying of the market occasioned a recovery of from 3s. to 4s. per hundredweight. This improvement, however, unfortunately did not last more than three or four weeks. By the middle of July quotations had dropped to 39s. per hundredweight. The acceptance of such a low price by holders induced extended purchases. Retailers pushed the sale of cheese in their shops, and the result of increased consumption was ultimately felt. By the beginning of August the market was again steady. During September and October the demand continued good and quotations had risen to 43s. Towards the end of October it was reported that supplies were likely to be short, and this occasioned a speculative demand to spring up, the effect of which was immediately beneficial. By the time the first shipment of cheese, which arrived from New Zealand in the s.s. "Papanui," was placed on the market, 47s. per hundredweight was ruling. The second shipment realised 48s., and from then till the end of March the market has been good and prices high, closing then at 57s. for white and 56s. for coloured New Zealand cheese.

Very little complaint can be made regarding the quality of shipments now coming to hand from the colony, which have been placed on the market in very good condition. Some of the arrivals have been rather immature, and the effect of this has been felt to some extent in the attitude of a few buyers who seem to be lacking in confidence of other shipments. I am pleased to note that a serious attempt is being made in the colony to further improve the quality of cheese by regulating the temperatures in the curing-rooms at the factories. The temperatures at which the cheese-chambers on board ship are maintained during the voyage—40° to 45°—are, I consider, from my experience here, rather low for producing cheese on arrival in the condition best suitable for being placed on the market. Especially I believe the range to be too low for cheese made and shipped early in the season. I am of opinion that if carried at a temperature 5° higher, the cheese would be of better quality and in better condition for sale and consumption on landing. When early shipments arrive in January, February, and March, and sometimes even in April, the weather here is cold and unfavourable for cheese-ripening on the floor of the merchants' warehouses. Consequently it may have to be held some time. I, therefore, would suggest the consideration of this matter by the authorities in the colony. I am confirmed in my belief by investigations I made concerning the shipment of cheese received early this season *ex s.s.* "Rimutaka." On sampling that cheese I found the quality highly satisfactory. Compared with early shipments of previous years there was a marked improvement. On examining the log and making inquiry of the engineer, I found what seemed to be a satisfactory explanation of this. Instead of applying cold air direct to the cheese-chamber and bringing the temperature down suddenly to 40° and 45°, as is usually done, the chamber had been allowed to cool very gradually, and it was not until the vessel had accomplished half her voyage that 45° was reached. On no occasion throughout the voyage did the temperature fall lower than 44°. To the fact that the chamber was thus gradually

cooled, and kept at the higher temperature throughout the voyage, thus allowing the cheese to continue slowly maturing, I attribute the improved quality of the "Rimutaka's" shipment on arrival. From 40° to 45° is, I consider, too low a temperature in which to place cheese suddenly after being taken from the shelves in the factory curing-room, where it had been probably held at 60° or over.

Taking New Zealand cheese generally this season, I am of opinion that there is an improvement in the quality compared with previous years. In going through the merchants' warehouses there are irregular parcels to be met with, but, on the other hand, most of the brands are very satisfactory indeed. Those handling them speak well of the quality.

FROZEN MEAT.

Mutton.

The market for New Zealand mutton during the past twelve months has been chiefly characterized by the steadiness shown and by the high prices realised. From 4½d. to 4¾d. has been the range ruling for the best Canterbury brands, and correspondingly good rates have been obtained for brands from other parts of the colony. While prices have been so satisfactory, reports heard on the market concerning trade have not been altogether cheerful. Dullness has been complained of. Owing, however, to the lightness of stocks and to the fact that no accumulations have occurred, holders have been able to regulate the market in a better manner than in some former years. This, I consider, has been a very satisfactory feature of the year's business. I am of opinion that, taken as a whole, the complaint of dullness may be looked upon as chronic and with some slight degree of suspicion. Naturally, as always happens, the high prices restricted business to some extent. The true test of the state of business seems to me to be the manner in which supplies have been got rid of and the prices that have been realised. Both the manner of disposal and the prices obtained have given proof that the year's trade in New Zealand mutton has been an unusually good one all round.

There has been a considerable premium obtainable throughout the greater part of the year for light-weight carcasses, which have seemingly been in smaller proportion than usual. The quality of the mutton on the whole has been good. I regret, however, that I had to report the seizure by the Health authorities of a number of carcasses of New Zealand mutton on the Smithfield Market. The reason for the seizure given by the Inspector was the usual one that "in his opinion the carcasses were unfit for human consumption." The Inspector reported that they were in a badly emaciated condition, and described them as "wasters"—that is, skin and bone. He further stated that, while the carcasses might when frozen be apparently fit for consumption, when placed in retailers' shops and thawed their appearance would be such that no Inspector would pass them. It is to be regretted that mutton of such inferior quality should have been permitted to be shipped from the colony.

Lamb.

The market for New Zealand lamb, like that for mutton, has been this past year a really good one. Prices have been remarkably steady and high. At no period could the demand for New Zealand lamb be considered dull. Prices from 5d. to 5¾d. prevailed for "Canterbury," with slightly less for other brands. Reports from all parts of the country concerning New Zealand lamb continue very satisfactory. No new development has to be reported, but the distribution of the meat throughout the country is steadily becoming more widespread year by year. Provision merchants are now extensively selling New Zealand lamb in competition with butchers, and in this way the article meets with extended distribution in all parts of the country. These retailers find it comparatively easy to handle the meat. They usually merely cut the carcasses in four quarters and sell them without further subdivision. The work does not incur extra expense on the provision-shops. Butchers are feeling this growing competition keenly. Although lamb is sold in this manner, mutton is not so dealt with. To handle mutton it would, of course, be necessary to introduce methods of butchering business more than provision-merchants care to do.

Beef.

Unlike the market for mutton and lamb, I regret that, with the exception of a few weeks, the New Zealand beef trade during the year has been very unsatisfactory and dull. The exception I refer to was caused by two short strikes which occurred, one in the States and the other in Argentine. The former was of most advantage to holders of New Zealand beef, who, taking advantage of the opportunity, were able to clear the stocks they had on hand at the time, at prices up to 5½d. per pound for hind quarters and 3½d. per pound for fore quarters. With this exception, however, prices ruled very low, hind quarters selling for most of the year at about 3½d. per pound, and fore quarters about 2½d. on the average. New Zealand beef has felt the competition of Argentine this year very keenly, the supplies from that country increasing enormously. Not only have frozen-meat shipments largely increased, but the quantity of chilled beef coming from there is now a considerable item. With large supplies of chilled meat arriving on the market it is easy to cause a sudden drop in prices. Meat when chilled has to be sold immediately it is landed; it cannot be held off the market, as frozen meat can, should conditions on arrival be unfavourable for sale. It has to be disposed of at whatever price is offered.

FRAUDULENT MEAT SALES.

The practice of submitting inferior meat for New Zealand meat continues to prevail extensively throughout this country. My attention has on various occasions been directed by the authority of large institutions to the difficulty in which they are placed in not being able to distinguish, when they have accepted tenders for New Zealand meat, whether or not that which is supplied to them is genuine. In several instances, though anxious to secure New Zealand meat for their requirements, they have dis-

continued stipulating that only New Zealand meat shall be supplied by contractors. The assistance lent to the deception by the use of tags such as are generally applied in the colony to carcasses is very considerable. During the year a prosecution under the Merchandise Marks Act was brought against a firm of West End meat-salesmen for fraudulently attaching New Zealand tags to Australian lambs, which were then supplied to fill contracts for New Zealand lamb. The case was proved, and the contractor was fined £20, being the maximum fine for the offence, and costs amounting to thirty guineas. Great interest was displayed in the case, especially by those in the meat trade. Reports, many of them of considerable length, appeared in nearly all the London papers and throughout the country giving details of the prosecution. In this way attention was directed to the fraudulent practice, and considerable good has resulted. Honest traders feel that they have the support of the New Zealand Government behind them, and have the more heart to push the sale of New Zealand meat on its merits, while those who are inclined to be dishonest are more chary about making the substitution.

HEMP.

Throughout the greater part of the past year the market for New Zealand hemp has continued in a very steady, satisfactory, condition. Prices showed little fluctuation, having kept on a £30 basis, while the demand was good. During the last few months, however, complaints have been more general of the quality of the hemp coming from the colony. Several parcels have come under my notice, the dressing of which has not been nearly so satisfactory as could be desired. Some of it has been "strawy" and unfinished. The result of this has been that at the close of the twelvemonth prices have shown a decline, and business has been more difficult to effect than previously.

I am particularly anxious to impress upon those engaged in the flax-milling industry the very great necessity there is for being careful that the quality of the hemp sent Home should be first-class. There is undoubtedly a very great temptation, when prices are ruling high for any class of produce, to pay more attention to quantity than to quality. I consider, however, that when prices are high it is then especially important to pay attention to quality, so that by giving satisfaction to purchasers a reputation for New Zealand hemp may be gained which may be permanent. This would help to increase the demand for it, and so keep prices at a steady, high level. Whereas, if the dressing is carelessly done, and the quality is not satisfactory, purchasers will only use it so long as they are compelled by circumstances, and immediately that stocks from other sources increase New Zealand hemp will become neglected owing to bad reputation.

The prospects for attaining a good market for New Zealand hemp are bright. The fact that quotations ruling for shipments to be delivered six months ahead are frequently equal to those paid for parcels on spot, give a good indication, I consider, of the future of the hemp trade.

The British Government has recently been making tests of New Zealand hemp with a view to ascertain its suitability for use in the navy at colonial stations. The result of these tests is being anxiously awaited, for, should it be satisfactory, a new and good outlet for the fibre will be obtained.

KAURI-GUM.

In accordance with instructions received from Wellington, during the year I completed arrangements for cabling to the colony the ruling prices for kauri-gum. Considerable difficulty was experienced in determining the particular classes for which quotations should be given, so as to afford those persons in the colony who are interested an indication of the value of the gum they are handling. I had the privilege of meeting Mr. Joseph Evans, of Awanui, Auckland, who is largely interested in the kauri-gum industry, and is recognised as an expert in the trade. After consultation with him, and with brokers handling the article here, I decided to quote for the following standards, as fairly representative, and as affording a good guide for determining the values of the many various sorts: "Ordinary to fair, three-quarters scraped," "fair, half scraped," "brown fair, half to three-quarters scraped," "brown pickings, common to good," "bush fair to good," "pale and amber, scraped."

DIRECT STEAM SERVICE FROM NEW ZEALAND TO WEST COAST PORTS.

During the year the service of steamers sailing direct from New Zealand to the west coast ports in this country has been commenced. Most of the merchants in the centres served by these ports are very strongly in favour of direct steamship service with New Zealand. The Chambers of Commerce there have been interesting themselves in the matter considerably, and substantial support has been given by them to help the development of trade.

It is to be hoped that now the service is commenced shippers in New Zealand will take advantage of it, and send sufficient and regular consignments forward so that the new trade they have been anxious to secure may be thoroughly developed. Shippers ought not to be afraid of facing a probable loss at the outset. They must naturally expect considerable opposition by many of those engaged in trade here to defeat their purpose. Any initial loss that may be sustained should be looked upon as so much money spent in advertising. It is, as business men are aware, impossible to advertise and push any new enterprise without considerable initial expense. Unless New Zealand shippers are prepared to fight for themselves to secure the advantage which the west coast service may bring them, the development of trade through new channels in this country may be much retarded.

As might be expected in the initiation of any new, large undertaking, the arrangements in connection with the service have not been altogether satisfactory, and complaints on many occasions have been made concerning them. With increased support and the growth of trade, however, many of the difficulties that have been noticeable probably will be removed.

The amount of dock accommodation at the west coast ports is very considerable, and when new docks now under construction are completed there will be enormous space. At Bristol extensive work

is being carried on for the enlargement of the Avonmouth Docks. There is large cold-storage now available, and additional accommodation for refrigerated cargo is to be erected when the new dock is completed. At Cardiff, where the Bute Docks have now large accommodation, an additional new basin is being provided. Not only is there at that port large cold-storage provided by the Cardiff Cold-storage Company, but the Bute Docks have also a splendid cold-store which so far has not contained a single carcase. Meat can be discharged into it direct from the ship which lies alongside, and railway-trucks can be loaded from it under cover. There is only accommodation at present for thirty thousand carcasses in this store, but it can be increased at any moment if necessary. At Barry, which is near to Cardiff, there is also very extensive dock accommodation, with a cold-store capable of holding seventy thousand carcasses. Additional accommodation can also if required here be provided. In Manchester the dock accommodation, which has hitherto been very considerable, is being largely increased, the ground formerly occupied by the racecourse having been taken over by the canal company and excavated for docks with warehouses. At this port there are three large cold-air stores, having accommodation for four hundred thousand carcasses. In Liverpool and Glasgow the accommodation, both dock and cold-store, as has repeatedly been reported by me, is fully ample for all requirements.

The various reports that have been made by me and forwarded to Wellington have given full particulars concerning the individual shipments. The several objections taken to the service here have been pointed out, and suggestions for the improvement of the same have been made. Merchants handling the produce received have been visited by me, and their statements concerning the lines they severally dealt in, together with any hints they may have made for the improvement of the direct trade, have been noted and duly reported. In all centres there has been a strong disposition manifested to support direct trade with New Zealand.

COLONIAL PRODUCE EXHIBITION.

Advantage was taken of the opportunity afforded by the Colonial Produce Exhibition held at Liverpool in January of obtaining a good show and advertisement for New Zealand produce in that centre. Special displays of the chief lines exported from the colony were made on the stand set apart for the New Zealand exhibits. Dairy-produce was emphasized by the erection of a trophy; and the quality of the butter and cheese which was shown and sampled was highly spoken of by local traders and others visiting the Exhibition. The grain and seed exhibits attracted the attention and praise of the representatives of several seed firms.

There being no refrigerating plant available, frozen meat was displayed in a specially prepared division of the stand. The carcasses of both mutton and lamb were changed every other day for a fresh lot, the good appearance of the exhibits being thus maintained. An assortment of tinned meats, tallow, &c., was shown, and the meat section was embellished by framed photographs of several of the freezing-works in the colony. Kauri-gum and wool were attractively displayed in glass show-cases. These exhibits aroused much interest, as did also a case showing specimens of New Zealand wool in all stages from the fleece to the manufactured cloth. Numerous inquiries were made regarding the hemp, which was shown in bales as imported. The collection of timbers was well examined by traders and other experts.

The appearance of the stand generally was rendered highly attractive by the display of splendid photographs of New Zealand scenery. A great quantity of literature referring to the colony was distributed, and, in certain lines, an increased quantity could have been disposed of to advantage.

Every attention was paid to visitors at the New Zealand stand, in the way of imparting information concerning the colony and its resources; the aim being to inform and influence both traders and consumers and those contemplating emigration to the colony. The New Zealand exhibits were favourably commented on generally, and well stood comparison with any other court in the Exhibition.

No awards were given by the Exhibition Committee to any exhibit shown. This was somewhat disappointing, and must be attributed to the fact of the Exhibition being organized by private enterprise.

I am satisfied that in the Liverpool Colonial Produce Exhibition New Zealand obtained a substantial and valuable advertisement. Not only were its leading products brought under the notice of traders and consumers at this end, but the merits of the colony as a field for settlement and travel were well impressed on the public. These objects, when compared with the expenditure incurred by some of the other colonies—Canada and Rhodesia, for instance—were attained, I am pleased to say, at a comparatively small cost to New Zealand.

CONCLUSION.

Although the work of this Department has, during the past year, shown a considerable increase. I am pleased to say that the details in connection with it have been well kept up. At times the pressure of work has been very great. The activity necessary for keeping in touch with the markets for so many lines as are now dealt with has been continuous. In this connection, especially in regard to dairy-produce, in which his colonial experience has been brought to bear, I have found the services of my assistant, Mr Hooper, of considerable value.

Occasionally I find lines of produce arriving from the colony concerning which I consider it is advisable that reports should be made, but of which I receive no intimation. I would therefore respectfully submit that in future it might be well if this Department could be supplied with particulars, as full as possible, of any lines that may be shipped from the colony, of which it may be considered advantageous to receive information from this office.

I have, &c.

The Hon. W. P. Reeves,
Agent-General for New Zealand, London.

H. C. CAMERON,
Produce Commissioner.

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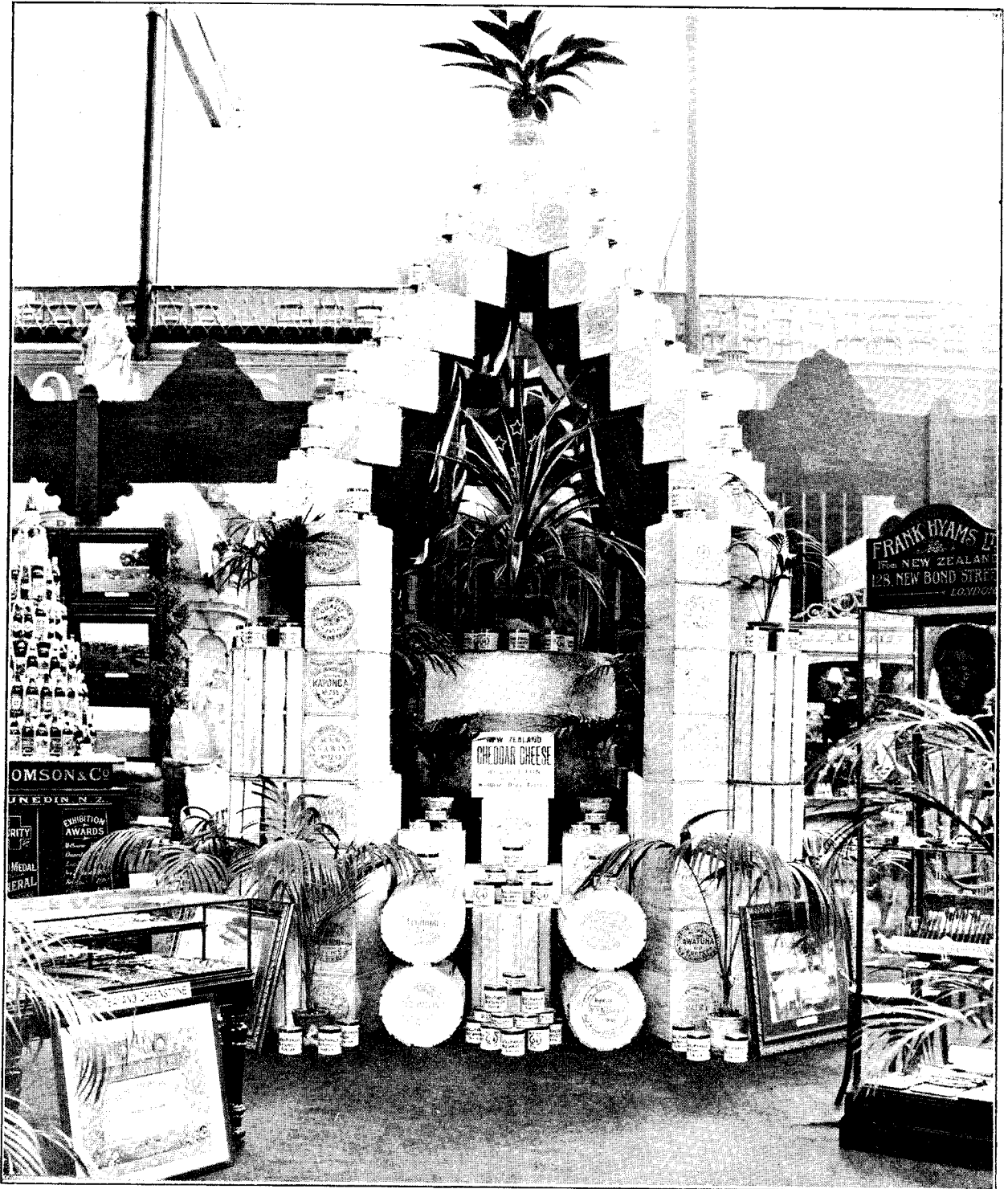
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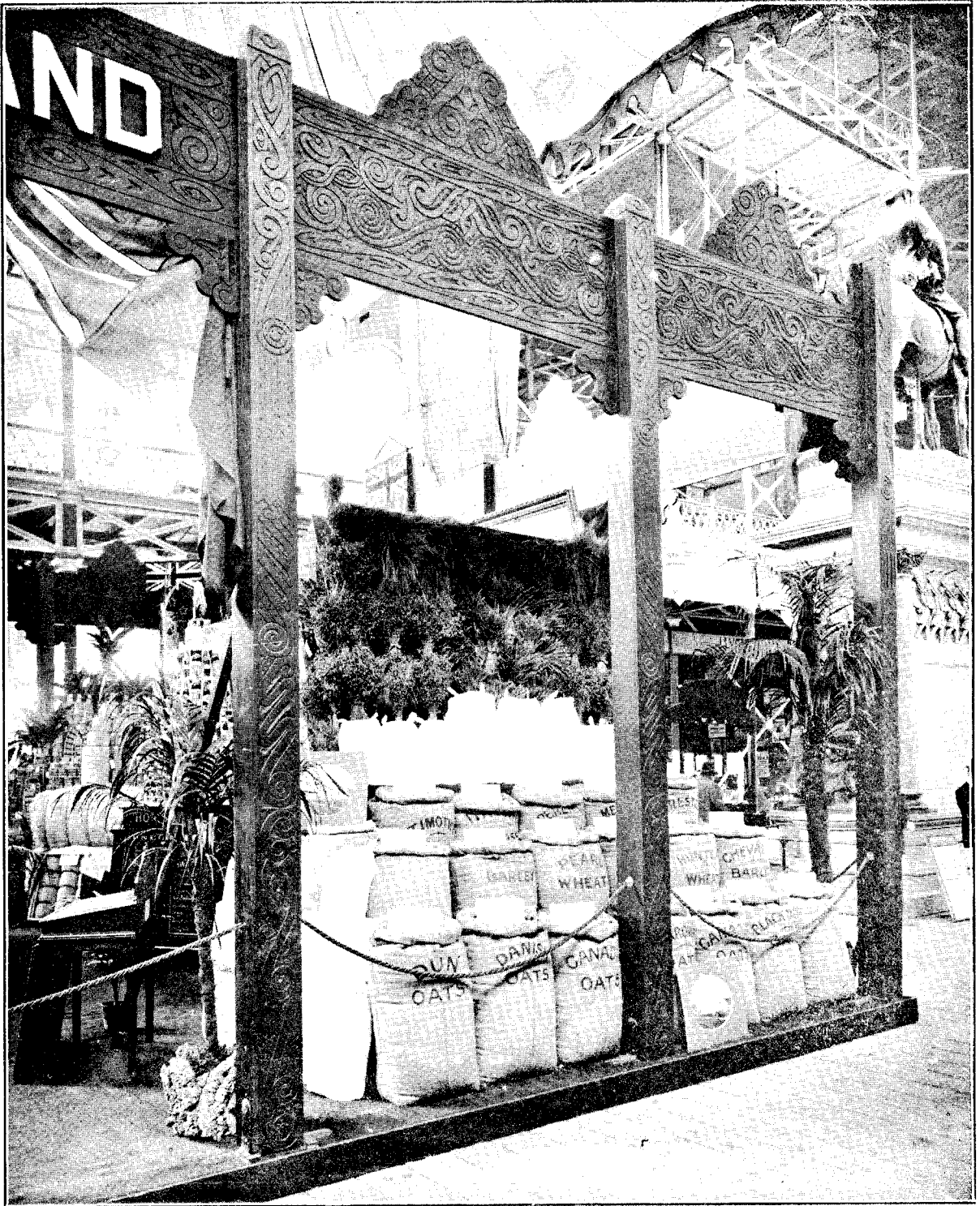
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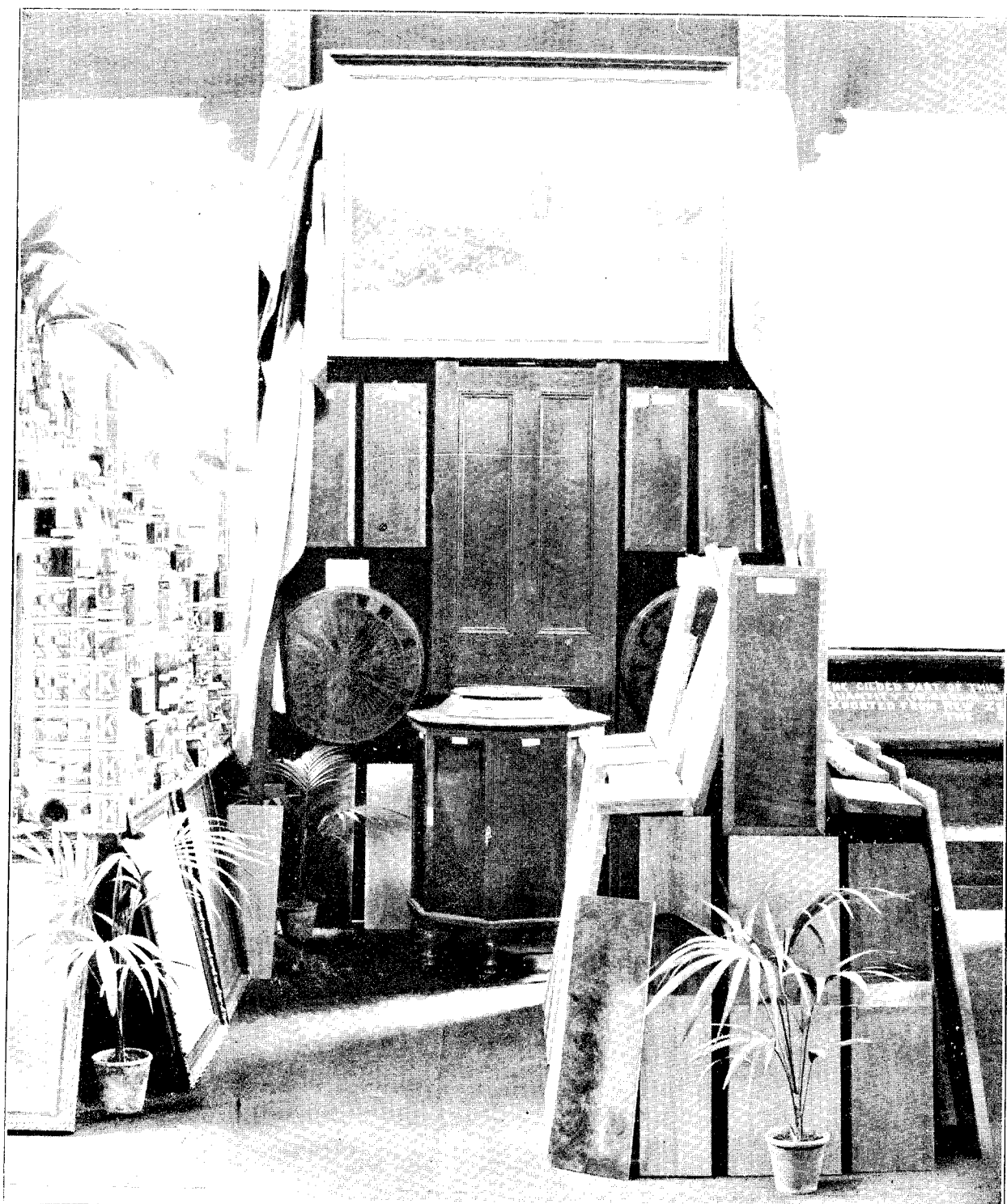
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