

SPECIAL AGENTS SERIES—No. 53

COTTON GOODS IN THE BALKAN STATES

By

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TRANSMITTED TO CONGRESS IN COMPLIANCE
WITH THE ACT OF MARCH 4, 1911, AUTHORIZING
INVESTIGATIONS OF TRADE CONDITIONS ABROAD

JUNE 12, 1912.—Ref rred to the Committee on Interstate and Foreign
Commerce and ordered to be printed

WASHINGTON
GOVERNMENT PRINTING OFFICE
1912

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LETTER OF TRANSMITTAL.

DEPARTMENT OF COMMERCE AND LABOR,

Washington, June 11, 1912.

SIR: I have the honor to transmit herewith, in accordance with the act making appropriations for the legislative, executive, and judicial expenses of the Government for the fiscal year ending June 30, 1912, approved March 4, 1911, a report by Commercial Agent Ralph M. Odell, of this department, containing the result of his investigations of the trade in cotton goods in the Balkan States.

Respectfully,

BENJ. S. CABLE,

Acting Secretary.

THE SPEAKER OF THE HOUSE OF REPRESENTATIVES.

LETTER OF SUBMITTAL.

DEPARTMENT OF COMMERCE AND LABOR,
BUREAU OF MANUFACTURES,
Washington, May 1, 1912.

SIR: I have the honor to submit herewith a report by Commercial Agent Ralph M. Odell on the cotton-goods trade of Roumania, Bulgaria, and Servia. Investigation shows that American cotton goods can be sold in each of these countries if proper effort is made and if American manufacturers are disposed to meet local requirements as regards terms of credit and quotations. The markets of these three Balkan States, with annual imports valued at approximately \$125,000,000, have apparently been neglected by American exporters, as our share of the import trade is less than 1 per cent. What business the United States now enjoys has been due not so much to the efforts of American manufacturers as to the initiative of the importers in these countries who are anxious to handle American products. The recent promulgation by Roumania of a law providing for the admission of American products under the conventional tariff removes one of the principal obstacles to an increase of American trade in that country. Mr. Odell has outlined the best methods for the successful exploitation of the field and has obtained numerous samples of the cotton goods in greatest demand.

Respectfully,

A. H. BALDWIN,
Chief of Bureau.

TO HON. CHARLES NAGEL,
Secretary of Commerce and Labor.

COTTON GOODS IN THE BALKAN STATES.

ROUMANIA.

GENERAL TRADE CONDITIONS.

Roumania has an area of 50,720 square miles and a population estimated in 1910 at 7,000,000. Its total foreign trade in 1909 amounted to \$160,837,846, of which the imports were valued at \$71,081,919 and the exports at \$89,755,927. The steady growth of Roumania's foreign trade is shown by the following table:

Years.	Imports.	Exports.	Years.	Imports.	Exports.
1880	\$49,280,000	\$42,251,000	1906	\$81,468,000	\$94,833,000
1885	51,828,000	47,858,000	1907	86,101,823	110,785,405
1890	70,019,000	53,260,000	1908	79,913,286	73,230,158
1895	58,783,000	51,154,000	1909	71,081,919	89,755,927
1900	41,878,000	54,040,000	1910	(1)	116,504,450
1905	65,145,000	88,220,000			

¹ Not available.

Exports are shipped chiefly through the ports of Braila and Galatz, near the mouth of the Danube, and Constantza, on the Black Sea. Imports also enter through these ports, but a considerable quantity comes overland from Austria-Hungary and Germany.

VALUE OF PRINCIPAL IMPORTS AND EXPORTS.

The value of the chief articles imported and exported in 1908 and 1909 is shown by the following table:

Articles.	1908	1909	Articles.	1908	1909
IMPORTS.			IMPORTS—continued.		
Metals, metallic articles, and mineral products...	\$19,338,042	\$16,774,057	Live animals.....	\$763,863	\$759,387
Textiles of vegetable fibers	14,363,293	12,667,289	Cereals and derivatives...	1,240,797	734,683
Machinery.....	7,250,017	6,195,567	Vegetable oils.....	1,133,549	700,727
Wool and woollen goods...	7,301,345	6,074,095	Clocks and watches.....	521,144	514,545
Wearing apparel.....	4,083,192	3,467,552	Explosives.....	288,784	486,343
Hides, skins, and leather goods.....	2,998,044	2,618,108	Paints and varnishes.....	401,855	482,536
Silk and silk goods.....	2,419,667	2,367,082	Furs.....	525,286	474,681
Animal products.....	2,018,086	2,337,553	All other articles.....	2,081,863	1,847,525
Fruits and spices.....	2,141,385	2,144,518	Total.....	79,913,286	71,081,919
Wood and woodenware.....	1,943,983	1,884,342	EXPORTS.		
Vegetables, flowers, and seeds.....	1,530,072	1,588,890	Cereal products.....	54,512,174	69,014,463
Chemicals, drugs, and medicines.....	1,474,535	1,516,905	Petroleum products.....	7,448,763	6,999,829
Vehicles, automobiles, and tank cars.....	2,671,442	1,488,968	Wood and lumber.....	5,110,251	5,683,013
Rubber, gutta-percha, and gums.....	604,614	1,308,121	Vegetable products other than cereals.....	2,267,844	4,036,092
Paper and paper products	1,080,121	906,145	Animal products.....	1,551,144	1,330,195
Earthen and stone ware.....	1,043,413	896,468	Wool and woolsens.....	341,266	406,409
Glassware.....	894,894	645,832	All other articles.....	1,998,716	2,285,926
			Total.....	73,230,158	89,755,927

DISTRIBUTION OF FOREIGN TRADE.

The following table shows in round numbers the value of imports from and exports to foreign countries in 1908 and 1909:

Countries.	Imports.		Exports.	
	1908	1909	1908	1909
Austria-Hungary.....	\$18,329,000	\$16,557,000	\$5,016,000	\$22,201,000
Belgium.....	2,494,000	2,240,000	20,424,000	23,410,000
France.....	4,493,000	4,570,000	5,363,000	5,308,000
Germany.....	27,176,000	24,055,000	4,741,000	5,135,000
Italy.....	4,157,000	3,411,000	6,635,000	6,562,000
Netherlands.....	1,090,000	1,035,000	11,584,000	9,552,000
Russia.....	2,458,000	2,081,000	1,523,000	797,000
Switzerland.....	1,478,000	1,350,000	31,000	15,000
Turkey.....	2,758,000	2,240,000	3,734,000	4,144,000
United Kingdom.....	12,807,000	11,151,000	7,793,000	6,689,000
All other countries.....	2,673,000	2,392,000	6,386,000	5,943,000
Total.....	79,913,000	71,082,000	73,230,000	89,756,000

The trade with the United States does not appear in the Roumanian statistics, but American statistics show that in 1909 the United States exported goods to Roumania to the value of \$603,411. This includes only direct shipments, in addition to which American goods come into Roumania from Germany and Turkey and are credited to those countries. Exports from Roumania to the United States in 1909, as shown by consular invoices, were only \$2,549, but in 1910 they increased to \$113,285—chiefly tobacco and fusel oil. American exports to Roumania are mainly agricultural machinery and implements, cottonseed oil, shoes, typewriters, automobiles, and miscellaneous machinery and tools. At the request of the American chargé d'affaires in Bucharest the Roumanian Government has agreed hereafter to give separate statistics of the trade with the United States.

From the foregoing table Belgium and the Netherlands would appear to be among Roumania's best customers. As a matter of fact, many of the exports to those countries are finally consumed by Germany and England. Splendid shipping service is maintained between Braila and Antwerp and Rotterdam, and in the grain season large cargoes of wheat, corn, and other cereals are shipped over this route.

Roumania is essentially an agricultural country, and cereals form by far the largest part of the export trade. There are also rich coal and oil deposits in the country, as well as salt mines and extensive forests. But the wealth of the country is derived chiefly from the products of the fields, and the buying power of the people—more than 80 per cent of whom live in the rural districts—depends upon the crops. In 1910 the crops were the largest in the history of the country, and preliminary statistics indicate that the exports that year exceeded all previous records. Import figures for 1910 are not yet available, but they also will doubtless show a great increase.

OBSTACLES TO AMERICAN TRADE—TARIFF ON COTTON GOODS.

In the steadily expanding trade of Roumania the United States has heretofore had a very small share. There have been two chief ob-

stacles to the development of our trade with that country. The principal exports of Roumania—cereals, oil, and timber—are articles which the United States produces in sufficient quantities for home consumption, whereas European countries are buyers of these products and large shipments are made each year to Germany, Austria-Hungary, Italy, France, England, and Turkey. It is natural that Roumania should endeavor to promote trade with these countries rather than with a country which buys an almost insignificant amount of her products.

A more serious handicap to the increase of American trade has been the tariff, which imposed a higher duty, in the case of many articles, on goods from the United States than on imports from European countries. England, Germany, Austria-Hungary, France, Spain, Italy, Turkey, and Russia have had treaties with Roumania by terms of which goods from these countries have enjoyed the conventional rates, while American products were subject to the general rates. This obstacle has been removed by the law promulgated in May, 1912, providing for the admission of American products under the conventional tariff. The following table shows the general and conventional rates on cotton goods:

Articles.	Rate of duty per 100 kilos.		Rate of duty per 100 pounds.	
	General tariff.	Conventional tariff.	General tariff.	Conventional tariff.
Yarn, single:	<i>Lei.</i>	<i>Lei.</i>		
Unbleached.....	3.00	.....	\$0.263	.....
Bleached.....	5.00	.....	.438	.....
Dyed or printed.....	12.00	.....	1.055	.....
Mercerized.....	14.00	.....	1.230	.....
Yarn, ply:				
Single twist.....	(¹)	.....	(³)	.....
Multiple twist.....	(²)	.....	(⁴)	.....
Sewing thread:				
Undyed.....	75.00	50.00	6.57	\$4.38
Dyed or mercerized.....	100.00	60.00	8.80	5.25
Yarn, twisted, on rollers ready for loom.....	(⁵)	(⁵)	(⁶)	(⁶)
Fabrics, unbleached and undyed:				
Weighing above 180 grams per square meter (5.31 ounces per square yard) and having in the warp and weft per square centimeter (0.155 square inch)—				
Up to 35 threads.....	75.00	55.00	6.57	4.82
From 36 to 55 threads.....	100.00	65.00	8.80	5.69
More than 55 threads.....	125.00	100.00	10.99	8.80
Weighing 100 to 180 grams per square meter (2.95 to 5.31 ounces per square yard) and having in the warp and weft per square centimeter—				
Up to 40 threads.....	90.00	60.00	7.88	5.25
From 41 to 70 threads.....	105.00	75.00	9.24	6.57
More than 70 threads.....	175.00	120.00	15.37	10.55
Weighing 70 to 100 grams per square meter (2.06 to 2.95 ounces per square yard) and having in the warp and weft per square centimeter—				
Up to 50 threads.....	100.00	70.00	8.80	6.13
From 51 to 80 threads.....	130.00	90.00	11.43	7.88
More than 80 threads.....	200.00	130.00	17.50	11.43
Weighing 70 grams or less per square meter (2.06 ounces or less per square yard) and having in the warp and weft per square centimeter—				
Up to 50 threads.....	125.00	125.00	10.99	10.99
From 51 to 80 threads.....	150.00	150.00	13.18	13.18
More than 80 threads.....	250.00	250.00	21.83	21.83

¹ Duty on component yarns plus 6 lei per 100 kilos.

² Duty on component yarns plus 12 lei per 100 kilos.

³ Duty on component yarns plus \$0.525 per 100 pounds.

⁴ Duty on component yarns plus \$1.055 per 100 pounds.

⁵ Duty on component yarns plus 0.50 leu per 100 kilos.

⁶ Duty on component yarns plus \$0.044 per 100 pounds.

Article ¹	Rate of duty per 100 kilos.		Rate of duty per 100 pounds.	
	General tariff.	Conventional tariff.	General tariff.	Conventional tariff.
Fabrics, bleached.....	<i>Lei.</i> (1)	<i>Lei.</i> (1)	(1)	(1)
Fabrics, dyed:				
In one color.....	(2)	(1)	(2)	(1)
In two or more colors.....	(3)	(1)	(3)	(1)
Fabrics, printed.....	(3)	(1)	(3)	(1)
Book muslin and canvas.....	100.00	80.00	\$8.80	\$7.00
Plushes and velvets:				
Of one color.....	150.00	120.00	13.18	10.55
Dyed or printed in more than one color.....	200.00	150.00	17.50	13.18
Flannels, drawers and all other knitted articles not specially mentioned.....	250.00	200.00	21.88	17.50
Knitted hosiery.....	280.00	215.00	24.50	18.82
Knitted gloves.....	350.00	280.00	30.68	24.50

¹ Duty on unbleached fabrics plus 20 per cent.

² Duty on unbleached fabrics plus 30 per cent.

³ Duty on unbleached fabrics plus 40 per cent.

SALES OF AMERICAN SHOES.

In two articles on which there has been no difference in the rates of duty, namely, agricultural machinery and shoes, American manufacturers have been able to establish a good trade. In nearly a dozen stores in Bucharest I observed various brands of American shoes. American goods are not well known in Roumania, but there is a desire to know more about them, and, fortunately, a high opinion of the quality of things American. At many shops American flags are displayed in the windows or are painted on the outside, and "articles Americains" is used as a sign to attract buyers and to emphasize the excellent quality of the merchandise on sale. Usually the only American goods in these stores are shoes and rubber goods. Sometimes, unfortunately, only imitations of American goods are sold, often with an English name or mark in order to make the buyer think he is getting the real article.

Conversations with dealers in American shoes developed the fact that there is a steadily growing demand for both American shoes and rubbers, and there is every reason to believe that trade in many other lines could be developed if proper methods of introducing the goods were employed. The shoe trade could be considerably increased if an enterprising American or Roumanian firm were to establish in Bucharest a large store, carrying a full stock of styles and sizes. The trade is now divided among 10 or 12 small dealers, each of whom has only a limited stock on hand. Frequently it happens that a prospective customer, attracted by the quality and shape of the American shoe, enters a shop only to find that he can not get the size desired, and he goes away feeling that the shoes are in some way inferior because he can not get what he wants. If the business were conducted on a more extensive scale, enabling the dealer to carry a larger stock, much better results could be obtained.

Another means of promoting trade in shoes, and this applies to other lines as well, was brought out in a conversation with a Bucharest merchant. This dealer stated that during the several years he had been handling American shoes he had never received a

call from a representative of the house. While a certain amount of business can be done by long-distance correspondence, the American manufacturer can secure more satisfactory results if at least once a year a representative of the firm calls on the Roumanian merchant, looks over his stock, and offers suggestions for increasing sales. Personal contact would undoubtedly stimulate the growth of our trade; the lack of it distinguishes American trade in Roumania from that of other countries. At least twice a year German, Austrian, English, and Italian manufacturers send representatives to confer with their agents and to cooperate with them in effecting sales.

AGRICULTURAL MACHINERY.

The Roumanian market is like that of many other countries in which there is a steady demand for manufactured articles. Being essentially an agricultural country, with a low tariff, there is a splendid opportunity for the sale of American agricultural machinery. If American firms place their products in the hands of good agents and cooperate with them by a campaign of publicity a splendid business can be done. It is estimated that 37 per cent of the agricultural machinery now used in Roumania comes from the United States; but we could secure a much larger share of this trade if the proper efforts were made.

The present duty on agricultural machinery and seed drills, winnowers, plows, harrows, and cultivators is 2 lei per 100 kilos (\$0.175 per 100 pounds), and on implements such as hoes, scythes, sickles, and forks, 7 lei per 100 kilos (\$0.613 per 100 pounds). There was in this case no difference between the general and conventional tariffs, and American machines entered on the same basis as those from other countries. Improved methods of cultivation in Roumania are widening the field for the sale of agricultural machinery and implements, and American manufacturers would do well to make a serious effort to secure a larger share of the trade by sending out representatives to demonstrate the merits of their machines.

COTTONSEED OIL—OLIVE OIL.

Cottonseed oil ranks next to agricultural machinery among the articles the United States sells to Roumania, and the demand is rapidly increasing. In 1908 the total imports amounted to \$206,412 and in 1909 to \$386,975. Of the latter approximately one-fourth was credited to the United Kingdom, Austria-Hungary, Italy, Germany, and Turkey, and three-fourths to "other countries." As cottonseed oil is not produced to any considerable extent in the countries named, and as the amount given under "other countries" refers chiefly to the United States, it is safe to assume that all of this oil was originally shipped from America. The market in Roumania for cottonseed oil has been investigated and treated fully by a commercial agent of the Department of Commerce and Labor. The tariff discrimination against cottonseed oil which existed at the time of his visit still obtains, but the demand is steadily growing because of the many new uses to which the oil can be put. This market deserves the serious attention of oil manufacturers.

The imports of olive oil, the chief competing article, amounted to only \$206,861 in 1909 as compared with \$877,781 in 1908. The duty on olive oil is 5 lei per 100 kilos (\$0.438 per 100 pounds) if in casks and 12 lei per 100 kilos (\$1.055 per 100 pounds) if in bottles or other receptacles. These are the conventional rates, and the general tariff is 10 and 18 lei per 100 kilos, respectively. The duty on cottonseed oil under both rates is 30 lei per 100 kilos (\$2.63 per 100 pounds).

TYPEWRITERS, AUTOMOBILES, TOOLS, ETC.

There are only two agencies for American typewriters in Roumania, and the trade in this line appears to have been neglected. Latin letters are used in the Roumanian language, and the obstacle encountered in Bulgaria and Servia, where Slavish letters are used, does not exist here. One American automobile is sold on this market, and the business has been very satisfactory, more than 40 machines having been sold in less than a year. A substantial, cheap car is desired, and if capable agents are selected and supported by the manufacturers a good trade can be built up. The trade in shoes has already been mentioned. The predilection of the natives for the American-style shoes and the good reputation which they enjoy should be used to advantage in increasing our trade. There is also a good demand for rubbers and goloshes, which are almost universally worn by the better classes during the winter months, and the American product is very much in favor.

The opportunities for the introduction and sale of other products of American manufacture in Roumania are numerous and varied. The large forest area of the country—more than 900,000 acres—creates a demand for sawmill machinery. The rich deposits of coal and of oil suitable for fuel make the country a good market for the sale of oil and gas engines for use in the industries. There are numerous flour mills, sugar factories, and chemical works, and a few cotton, woolen, linen, and silk mills; although manufacturing is not conducted on a large scale, the Government is endeavoring to promote the country's industrial development by granting liberal concessions, and American manufacturers of engines, pumps, machinery, and tools can obtain a share of the trade this industrial awakening will create. American hardware is not enjoying the sale it deserves.

BEST METHOD OF ENTERING MARKET.

American trade can be obtained here in proportion to the real desire of manufacturers to enter the field and their willingness to adapt their methods to existing conditions. The New York manufacturer of machinery, tools, or hardware does not introduce his goods into Texas or Illinois by correspondence and catalogues, but through a representative from the home office. It is just as essential that he should employ the same methods in placing his products in Roumania and the markets of the Near East.

I have found an earnest desire among merchants and jobbers to represent certain American products. In appointing agents, however, the same care and judgment should be exercised as at home. In the World Trade Directory, issued by the Bureau of Manufactures, there is a list of dealers in the principal lines of goods in Bucharest. A supplementary list is transmitted with this report [and may be

obtained from the Bureau of Manufactures]. Business relations, however, can be best established through a visit to the country by a personal representative of the manufacturer. Bucharest can be reached from Berlin in 34 hours, from Vienna in 26 hours, and from Constantinople in 20 hours.

Whatever the merit of an article, its value or good qualities must be demonstrated by some person who is familiar with it and who is authorized to select an agent after going over the field thoroughly. Through the local agent the particular tastes and requirements of the trade can be ascertained and met, and difficulties can be overcome through mutual cooperation. But having selected an agent, he should not be left to develop the business alone; he should be visited at least once a year in order to secure the most satisfactory returns.

Good results can not be obtained by sending out catalogues or letters in an unfamiliar language, with prices quoted in a currency the value of which is unknown. English is not generally understood, and the merchants are too busy to hunt up friends to translate letters or catalogues for them or to search through books to ascertain the value of American money. This is sometimes done in the case of an article that possesses some peculiar merit, but, generally speaking, the business is secured by some German or English house that has a representative on the ground with all information and details regarding prices, and usually with a full line of samples of the articles offered. French or German is spoken by a large majority of the better classes and by practically all the merchants and business men; correspondence and catalogues should be in one of these languages, preferably French.

CURRENCY, WEIGHTS, AND MEASURES—CREDITS.

The monetary unit of Roumania is the leu, which is of the same value as the franc (\$0.193), and quotations should be in francs. The metric system is in general use, although Turkish weights and measures are employed to a limited extent. In the matter of credits, business can be done on a safe basis if proper care is exercised. Many merchants are able and willing to pay cash against shipping documents, if it is demanded; but this method of settlement is not the rule, and, other things being equal, the German, English, or Italian manufacturers will secure the preference because they extend liberal terms. Business is not conducted on a large scale, and many merchants of high commercial standing operate on small capital. As they must extend credit to their customers it is sometimes hard for them to meet the insistent demands of American dealers for cash payments.

Conditions in this respect can best be appreciated and met by a personal visit to the field, and careful inquiry as to the reliability of agents or merchants. So long as American manufacturers are unwilling to grant the same credits as competing nations the volume of American trade must necessarily suffer and be limited to those who are willing to tie up their funds in bankers' credits for the privilege of handling American goods. There are many houses here that buy on credit and from whom a debt is a perfectly sound asset. It is to be regretted that orders from such firms should be lost because we refuse to offer the same credit terms as our competitors.

COTTON GOODS TRADE.

Careful investigation and inquiries among importers and dealers revealed the fact that American cloth and cotton goods are unknown on this market. Textiles made of vegetable fibers rank second in importance among the imports of the country; and while this classification includes cotton, flax, hemp, and jute products, cotton manufactures constitute by far the greater part of the total.

The following table shows the value of the yarn, cloth, and other manufactures of cotton imported by Roumania in 1908 and 1909:

Articles.	1908	1909	Articles.	1908	1909
Yarn:			Fabrics—Continued.		
Single—			Dyed in one color.....	\$780,430	\$871,477
Unbleached.....	\$2,517,164	\$2,362,581	Dyed in several colors		
Bleached.....	589,960	437,729	or printed.....	4,040,705	3,568,852
Dyed or mercer-			Table covers, curtains,		
ized.....	264,473	306,294	draperies.....	1,391,434	1,228,283
Twisted—			Laces and embroideries...	409,910	358,076
Unbleached.....	67,290	27,401	Knit goods.....	345,070	246,960
Bleached.....	21,272	19,944	Made-up articles of plain		
Dyed or mercer-			cotton or trimmed with		
ized.....	136,700	132,858	silk, lace, or fur.....	186,592	175,764
On beams or spools			Cotton velvets and plush..	183,450	147,863
ready for the loom—			Oilcloth.....	118,521	115,929
Unbleached.....	749,695	451,558	Tulle and curtain lace....	114,419	94,464
Bleached.....	34,298	34,817	Ribbons and braids.....	57,648	58,520
Dyed or mercer-			Tarred cloth and linoleum	70,178	37,585
ized.....	266,160	123,020	Passamenterie.....	35,170	30,093
Sewing thread.....	446,829	420,318	Book muslin and canvas..	44,314	29,307
Total.....	5,093,841	4,316,520	Lamp wicks.....	12,828	13,138
Fabrics:			Trimmings and buttons..	1,141	1,492
Unbleached.....	195,148	164,900	Total.....	9,022,894	8,052,851
Bleached.....	1,035,936	910,148	Grand total.....	14,116,735	12,369,371

The total value of the imports in 1909 was nearly \$2,000,000 less than in the preceding year. Crops, on which the foreign trade of the country so largely depends, were very poor in 1908, and this accounts in a large measure for the heavy decline in imports during the year following, at which time the effects of the small yield were most keenly felt. Crops were good in 1909, and in 1910 the yield exceeded all previous records. Statistics of imports during 1910 are not now available, but they will undoubtedly show a large increase.

COTTON MANUFACTURING.

Another reason for the decreased imports of cotton goods is the development of the local cotton industry, which has only begun to assume a degree of importance during the last few years. There are now in Roumania 8 cotton-weaving mills, which contain 3,000 looms and employ about 2,000 operatives. The most important of these is the Fabrica Română de Bumbăcărie Colentina, at Bucharest. In the weave shed of this mill, which is of modern saw-tooth roof construction, 640 looms are operated. Four hundred workpeople are employed, at an average daily wage of 2.50 francs (\$0.483). The mill is managed by an Englishman, and all the overseers are Englishmen. Power is developed by a Diesel oil engine, at a cost of about \$10 per horsepower per year of approximately 300 working days of 10 hours each. The oil used is obtained from native fields and costs, at present, 50 francs (\$9.65) per metric ton (2,204 pounds). In

connection with its weave shed this mill operates a bleachery—the only one in the country—and the production of 100,000 meters (109,361 yards) per week consists entirely of “chiffon,” or bleached goods, of many different qualities. The better grades are 72 by 72 picks with 30s warp and 30s filling, while the lower qualities are 56 by 56 and 64 by 64 picks with 20s to 24s yarn. The cloth is put up book fold, 30 meters to the piece, and is carefully and neatly wrapped in black glazed paper.

There are four other mills in Bucharest, two with 400 looms each, one with 300 looms, and one with 88 looms; there are also three others in different parts of the country, all of which are branches of English firms or are controlled by English mills. The product of the native mills consists of gray goods and coarse colored goods, such as stripes, plaids, cottonades, and cheap gingham. Spinning is not carried on and the mills buy their yarn chiefly from England. It is shipped on cops and is spooled, warped, and slashed at the mill.

To encourage industries in Roumania, the Government a number of years ago enacted a law which granted for a term of 15 years the following privileges and concessions to those who established factories: (1) Free land up to 5 hectares (12.36 acres), (2) exemption from all taxes, (3) exemption from import duties on machinery and on raw materials not produced in the country, (4) reduction in freight rates of 35 per cent on all raw materials and 45 per cent on manufactured goods.

The cotton industry has been further assisted by the fact that the Government requires a large amount of cloth each year for shirts for the soldiers, and under the present law one-half of the contract must be given to the mills and one-half to the peasants who weave cloth on hand looms. While the total annual production of the cotton mills is valued at only about \$1,000,000, practically all the gray goods and the cheaper qualities of bleached and colored goods which were formerly imported are now furnished by the native mills.

SOURCE OF IMPORTS.

The share of the various nations in the cotton-goods trade in 1909 is shown by the following table; the amounts are given in pounds, as the statistics do not show the value of the goods imported from each country:

Articles.	United Kingdom.	Austria-Hungary.	Italy.	Germany.	France.	Other countries.	Total.
Yarn:							
Single—	<i>Pounds.</i>	<i>Pounds.</i>	<i>Pounds.</i>	<i>Pounds.</i>	<i>Pounds.</i>	<i>Pounds.</i>	<i>Pounds.</i>
Unbleached.....	8,088,628	1,369,194	2,232,001	1,034,002	65,000	35,446	12,824,271
Bleached.....	56,364	1,060,154	808,817	62,553	2,937	5,956	1,995,881
Dyed or mercerized.....	74,813	624,657	87,652	434,914	207	24,684	1,246,927
Twisted—							
Unbleached.....	52,479	8,615	41,753	7,372	.....	4,004	114,223
Bleached.....	13,798	11,790	19,382	17,624	255	8,136	70,985
Dyed or mercerized.....	11,136	177,978	105,545	81,814	687	48,651	425,811
On beams or spools ready for the loom—							
Unbleached.....	1,435,348	199,936	238,366	170,529	2,563	12,175	2,058,917
Bleached.....	52,912	39,602	27,502	26,572	310	95	146,993
Dyed or mercerized.....	21,688	94,774	25,280	336,193	62	5,422	483,419
Sewing thread.....	682,609	323,466	17,507	210,823	12,615	18,645	1,265,665
Total.....	10,489,775	3,910,166	3,603,805	2,382,396	84,636	162,314	20,633,092

Articles.	United Kingdom.	Austria-Hungary.	Italy.	Germany.	France.	Other countries.	Total.
	<i>Pounds.</i>	<i>Pounds.</i>	<i>Pounds.</i>	<i>Pounds.</i>	<i>Pounds.</i>	<i>Pounds.</i>	<i>Pounds.</i>
Fabrics:							
Unbleached.....	433,310	42,235	32,065	50,725	1,540	53,350	613,225
Bleached.....	1,374,232	317,775	391,232	266,937	51,410	231,460	2,633,046
Dyed or printed.....	3,704,523	2,251,623	2,476,828	2,386,388	153,839	704,381	11,677,582
Cotton velvets and plush.....	86,590	21,912	684	69,914	19,078	6,989	205,167
Tulle and laces for curtains.....	64,808	17,026	5,086	21,912	6,288	5,953	121,073
Laces and embroideries.....	72,626	11,425	2,761	41,120	5,507	24,640	158,079
Table covers, curtains, and draperies.....	91,843	266,783	57,057	184,813	28,512	176,544	805,552
Tarred cloth and linoleum.....	363,390	147,653	22,187	131,256	5,113	9,068	678,667
Oilcloth.....	167,952	218,141	1,930	41,538	6,750	4,140	440,451
Knit goods.....	959	34,683	3,450	269,020	17,864	4,989	330,965
Made-up articles of cotton or trimmed with silk, lace, or fur.....	2,076	85,147	937	23,230	16,262	4,670	132,322
All other manufactures.....	3,764	88,900	65,729	129,422	19,389	5,857	313,061
Total.....	6,366,073	3,503,303	3,059,946	3,616,275	331,552	1,232,041	18,109,190
Grand total.....	16,855,848	7,413,469	6,663,751	5,998,671	416,188	1,394,355	38,742,282

YARN TRADE—HAND-LOOM WEAVING—PEASANTS' COSTUMES.

The imports of yarn, exclusive of sewing thread, exceeded those of cloth. Part of this yarn was used by the weaving mills, but the greater portion was sold to peasants for use on hand looms. Practically every home in the country districts is provided with a hand loom, on which all the coarse heavy goods for clothing are woven. In proportion to population the extent of hand-loom weaving is perhaps greater in Roumania than in any other country in the world, with the possible exception of India. In the weaving of silk goods a very high degree of excellence has been attained by the peasants, and their products are very much sought after by the upper classes. This is due partly to the patronage of the present Queen of Roumania and her efforts to encourage the native industry.

The costume of the men in the rural districts usually consists of a long coarse cotton blouse, drawn in at the waist by a cord or belt, and trousers of the same material. The women generally wear a coarse, loose-fitting jacket or bodice, with a skirt of some dark-colored material and a handkerchief or head shawl over the head. In winter sheepskin is usually worn over the upper part of the body. Hosiery is not used by the poorer classes, the feet being wrapped with a narrow strip of cloth, or bandage, usually of the same material as the trousers, and extending up the leg. Instead of shoes, homemade sandals, usually of hemp, are worn. This is the everyday costume of the peasants. The gala or holiday dresses are rather handsome, each district in the country having its own peculiar costume. They are usually made of a combination of cotton and silk or wool and silk, and the mantle or shawl, which is wrapped gracefully around the lower part of the body, is often richly ornamented in bright and showy colors and sometimes with gold or silver threads. The entire costume is made by the peasant in the home, from imported yarn in the case of cotton, and from raw silk obtained in the country.

The largest item in the yarn imports is single unbleached yarn, most of which is 12s to 30s, put up in skeins and packed in 10-pound packages. More than half of the yarn imported in 1909 came from England; in fact, Roumania is one of England's best customers. British statistics show that, in quantity taken, Roumania in 1911

ranked fourth among the countries to which yarn was exported, coming after Germany, the Netherlands, and India.

CLOTH TRADE—GOODS FURNISHED BY VARIOUS COUNTRIES.

In cotton manufactures England is far in the lead, nearly one-third of the cloth and miscellaneous goods being purchased from that country. Austria-Hungary, Italy, Germany, France, and Switzerland are the other countries sharing largely in the trade. Of the amount credited to "other countries," Switzerland furnished 363,584 pounds, of which only 27,200 pounds was yarn. The principal manufactures furnished by Switzerland were bleached fabrics, 79,292 pounds; dyed or printed fabrics, 93,696 pounds; table covers, curtains, and draperies, 124,650 pounds. The remainder credited to other countries includes imports from Belgium, Netherlands, Turkey, Spain, and Russia, in the order named.

Italy's trade in Roumania has nearly doubled from 1900 to 1909. Formerly one of the least important, Italy is to-day one of the chief factors in the cotton-goods trade. This business has been secured by the same methods that the Italian cotton manufacturers have used in developing markets in Turkey, Argentina, and elsewhere. Representatives were sent out to study the field, ascertain what kinds of goods were in demand, and select agents. The manufacturers then proceeded to cater to the tastes of the people and to furnish the goods at a low price by the use of cheap cottons in the mixings and by weaving split goods. Examination of the various goods sold on this market revealed that practically all the split goods were of Italian manufacture. These items comprised more than 80 per cent of its total shipments of cloth to Roumania.

As a rule, the better grades of velvets come from England and France and the cheaper grades from Germany and Austria-Hungary. Sateens and linings are furnished by England and Italy and these countries are also the chief suppliers of duck in gray, blue, and brown, and in widths of 60, 70, and 80 centimeters (23.6, 27.6, and 31.5 inches). Switzerland leads in the embroidery trade. The better grades of lace come mostly from Nottingham, and the cheaper qualities from Germany.

Nankeen is a very popular cloth in Roumania. It is woven with white warp and colored filling and is somewhat similar to a stiff-finished chambray. In finish it differs from the nankeen used so widely in China, which usually has a soft finish. The colors in greatest demand are pink, red, and yellow or chamois. England, Germany, and Austria-Hungary share in the trade in this line, but recently it has been made in the native mills. A sample of the latter is forwarded with this report. It is 56 by 56 picks, 30/31 inches wide, and weighs 3.25 yards per pound. The goods are put up in book fold in lengths of 30 to 35 meters, and the present wholesale price is 67 to 70 bani per meter (11.81 to 12.34 cents per yard).

CLASS OF GOODS IN DEMAND.

The cloths in greatest demand in Roumania are prints, gingham, stripes, and printed flannelet and barchent, the last named being napped on one side. The better qualities of all these goods are fur-

nished by England, Germany, and Austria-Hungary, while the cheaper grades come from Italy and from the native mills. No print goods are made in Roumania. Lightweight prints and gingham are sold in summer, while flannelet, barchent, and imitation woolen goods are in demand during the winter months. Samples of all the principal qualities of these goods with present wholesale prices are forwarded with this report, and they merit examination by American manufacturers.

A popular English print, or calico, is 27 inches wide, weighs 7 yards per pound, and sells wholesale at 44 to 46 bani per meter (7.75 to 8.11 cents per yard). A print of Austrian make with a soft finish and made of finer yarns is 30/31 inches wide, 5.85 yards per pound, and sells at 65 to 68 bani per meter (11.46 to 11.99 cents per yard), while another from the same country is 27 inches wide, 7.5 yards per pound, and sells at 49 to 52 bani per meter (8.63 to 9.17 cents per yard). The two Austrian prints are sold under trade names that have been used for many years and are extremely popular. The sample of so-called "Florida," which very much resembles the cheaper grades of American madras, is woven in the native mills. It is 26/27 inches wide, weighs 4.75 yards per pound, and sells at 46 to 48 bani per meter (8.11 to 8.46 cents per yard).

In barchent Italy predominates, and a popular style is printed red with small white polka dots. It is a three-leaf twill weave 21/22 inches wide (woven double and split), weighs 6.25 yards per pound, and sells at 44 to 46 bani per meter (7.75 to 8.11 cents per yard). Another quality, printed in dark colors to resemble wool, is 27/28 inches wide, weighs 5 yards per pound, and the present price is 57 to 60 bani per meter (10.05 to 10.58 cents per yard). A popular Austrian flannelet, napped on one side, is made with colored yarn in a black and red check pattern with a fancy stripe. It is 26/27 inches wide, weighs 3 yards per pound, and sells at 86 to 91 bani per meter (15.17 to 16.05 cents per yard). A cottonade (called here "materia") from Switzerland is 18/19 inches wide, weighs 7.75 yards per pound, and is sold at 43 to 45 bani per meter (7.58 to 7.93 cents per yard). A piqué (napped on one side) from Austria is 27 inches wide, weighs 3.7 yards per pound, and the present price is 85 to 90 bani per meter (14.99 to 15.87 cents per yard).

The foregoing comprise the principal prints and colored goods sold on this market. In the samples which are forwarded several patterns of each style are shown. Red and blue are the most popular colors.

FABRICS MADE IN ROUMANIAN MILLS.

In gray and bleached sheetings and shirtings, croydons, madapollam, mexicans, long cloth, and chiffon (bleached shirting), all of which are widely sold, the native mills have practically driven out foreign goods, except in the finer grades, and imports are limited to the finer qualities, which come chiefly from England. Three grades of the latter, showing the most popular styles, are forwarded. The first is a madapollam 40/41 inches wide, 56 by 40 picks, weighs 3.7 yards per pound, and sells at 15.75 to 16.50 lei (\$3.04 to \$3.18) per 40-yard piece. The cloth is rather heavily filled with starch and is used in making flour bags. A somewhat better grade is 29/30 inches wide, 64 by 64 picks, weighs 7 yards per pound, and commands a

price of 13.75 to 14.25 lei (\$2.65 to \$2.75) per 40-yard piece, or 6.63 to 6.87 cents per yard. A croydon from England is 38/39 inches wide, 52 by 60 picks, weighs 3.75 yards per pound, and sells for 14 to 14.75 lei per piece of 22 meters (10.21 to 11.81 cents per yard).

Several samples of croydons, chiffons, and long cloth of native manufacture are furnished. The so-called chiffon is simply a bleached shirting, usually 31/32 inches wide and put up 30 meters (32.8 yards) to the piece. Long cloth, as known here, is bleached and unbleached sheeting 30 to 40 inches wide and put up in lengths of 33 meters (36 yards). While many of the gray and bleached goods have colored head ends woven in the cloth there is no strong demand for them and goods are not usually sold by headings or brands. In general, mexicans and long cloth are 33 meters to the piece; chiffon is 30 meters, croydon 22 meters, and madapollam (from abroad) 40 yards to the piece. Colored goods and prints are from 35 to 50 meters (38.28 to 54.68 yards) to the piece and come 40 to 50 pieces to the case, although there are no special requirements as to packing and generally a wide assortment of patterns in an individual case is not demanded except on an initial order. The latter statement refers only to the wholesale dealers, by whom most of the goods are imported, and not to retail houses, which sometimes import direct one or two cases of widely assorted goods.

As a rule the leading importers keep an open stock and pack goods for shipment to retail dealers in any manner desired by the customer. Gray and bleached goods should be put up narrow fold or book fold, in meter folds; for colored goods the book fold is absolutely necessary.

OPPORTUNITY TO INTRODUCE AMERICAN GOODS.

While the native mills supply the home demand for gray and bleached goods and, to a large extent, for cheap colored goods, foreign manufacturers are depended on for the better grades of these goods and for all prints, flannelets, piqués, percales, medium and fine gingham, and velvets. The description and prices of the principal goods in demand which have been given above are sufficient to demonstrate the possibility of American manufacturers securing a share of this trade. The fact that American goods are unknown here would be no obstacle if they were properly brought to the attention of dealers and importers, and the desire of the people for things American makes the present an opportune time for the introduction of American cotton goods.

The best method of entering the market is that employed by the countries which now have the trade. The cotton manufacturers of England, Germany, Austria-Hungary, and Italy are represented in Bucharest by their own agents. Twice each year, in the spring and the fall, salesmen from the home office visit Bucharest, bringing with them a full line of samples, and they are prepared to quote prices for at least six months in advance. These salesmen, accompanied by the local agent, call on the various dealers, make inquiries as to any new styles or patterns in demand, and note any complaints that may have arisen. In short, everything possible is done to cooperate with and support the local agent, to keep in touch with the trade, and to increase business. Prices are usually quoted f. o. b.

Manchester, Vienna, or Berlin, and the customer pays all freight charges, duties, and other expenses. The terms are usually six months, and American manufacturers should at least endeavor to extend credit to cover the period required for transportation and delivery of the goods. The agents whose names are forwarded with this report [and which may be obtained from the Bureau of Manufactures] are reputed to be men of business integrity, and undoubtedly satisfactory credit arrangements can be made with them.

Roumania is a country that is developing rapidly through exploitation of its rich agricultural resources. At present the peasants' hand looms supply a considerable part of the cotton goods consumed, but the development of the country will doubtless cause a decline in this industry; and as the purchasing power of the people increases so will the demand for cotton goods. American cotton manufacturers should lose no time in securing a foothold in the market. Representatives with authority to appoint agents and with a full line of samples neatly and attractively prepared should visit the country without delay. The samples of American colored goods and prints that I exhibited to the trade impressed the dealers very favorably, and the prices are no higher than those quoted by other countries, after making due allowance for the higher freight rate. We should not neglect this market. The growing sentiment for American goods seems to favor us, and if a serious and conscientious effort is made along the lines indicated, good results will certainly follow. It will not be a wise policy simply to send samples and quote prices; the man on the ground usually gets the trade, and the market deserves special attention.

KNIT GOODS AND SPECIALTIES.

What has been said in regard to cotton goods applies equally to knit goods and specialties. Careful inquiry and investigation disclosed the fact that seamless hosiery is almost unknown here. The cheaper grades of knit goods are supplied by native mills, but the better qualities of cotton hosiery selling at 40 to 50 cents per pair are imported, chiefly from Germany. A good business could be done in seamless hosiery with a lisle finish, selling at 50 cents to \$1 per pair, because there is nothing on the market to be compared with it as regards quality and appearance. The person who desires something a little better than the ordinary cotton hose must be content with silk goods, for which he pays 12 to 15 lei (\$2.30 to \$2.90) and sometimes 20 lei (\$3.85) per pair.

There is a market for other lines of men's furnishing goods and haberdashery, and the fact that they are of American manufacture would at present secure a good trade for them. Several firms in Bucharest would be glad to put in a line of such goods, but they would first like to see samples, displayed by a representative of the firm. The possibilities of extending American trade in Roumania despite the disadvantages of distance are undoubtedly very favorable, and American manufacturers would do well to undertake an active campaign.

TRANSPORTATION AND FREIGHT RATES.

There is no direct steamship service to Roumania. Shipments may be made via Liverpool, Bremen, Hamburg, Rotterdam, Ant-

werp, or Constantinople, with transshipment at any of these ports. The time of passage is about 60 days by the ocean route. Merchandise may, however, be shipped over the Wilson line to Hull, England, where it is transferred to steamers for Stettin, Germany. Between Stettin and Roumanian cities a so-called "overland rapid service" is maintained, the time between Stettin and Bucharest being 11 days.

Freight rates vary considerably from time to time. The present rate from New York to Constantinople is 27s. 6d. (\$6.69) net per ton of 40 cubic feet. The rate from Constantinople to Bucharest via Constantza is 47 francs (\$9.07) per metric ton. The latter rate includes all transshipment charges and dock fees at Constantinople and Constantza. The reason for the high rate is the railroad freight from Constantza to Bucharest, the rate from Constantinople to Constantza being only 12 francs (\$2.32) per metric ton. The rate from Manchester to Bucharest by the ocean route is \$18.33, and by the "overland rapid service" \$25.28 to \$27.02, according to the size of the shipment. The rate from New York to Constantinople as given above is per measurement ton, the rate per metric ton weight will be somewhat more, as 40 cubic feet of cotton goods weigh about 20 per cent more than a metric ton. On the whole, however, the rates from New York to Roumania are but little more than the rates from England. All of the rates quoted apply to cotton goods. The rate on agricultural machinery from New York to Galatz varies from 17s. to 27s. (\$4.14 to \$6.57) per ton of 40 cubic feet.

BULGARIA.

GENERAL TRADE CONDITIONS.

The total foreign trade of Bulgaria in 1910 amounted to \$59,137,000, of which the exports were valued at \$24,907,000 and the imports at \$34,230,000. The increase in Bulgaria's foreign commerce from 1880 to 1910 is shown in round numbers by the following table:

Years.	Imports.	Exports.	Years	Imports.	Exports.
1880.....	\$9,307,000	\$7,357,000	1906.....	\$20,936,000	\$22,113,000
1885.....	8,500,000	8,661,000	1907.....	24,060,000	24,240,000
1890.....	16,314,000	13,713,000	1908.....	25,119,000	21,675,000
1895.....	13,321,000	14,994,000	1909.....	31,963,000	21,685,000
1900.....	8,944,000	10,418,000	1910.....	34,230,000	24,907,000
1905.....	23,594,000	28,556,000			

PRINCIPAL IMPORTS AND EXPORTS.

The value of the principal articles imported and exported in 1910 is shown in the following table:

Articles.	Imports.	Exports.	Articles.	Imports.	Exports.
Animals, live.....	\$188,167	\$1,413,596	Earthen, china, and glass ware.....	\$991,969	\$9,865
Alimentary products of animals and fish.....	432,952	2,509,314	Minerals, metals, and metal products.....	4,496,612	217,554
Cereals and grain, and products thereof.....	561,848	15,596,557	Timber, wood, and wood-ware.....	1,349,649	126,549
Fruits, vegetables, plants, and seeds.....	627,475	594,858	Paper and paper products.....	728,004	1,116
Provisions and groceries.....	1,997,236	396,755	Hides, skins, and manufactures of.....	1,773,191	788,685
Wines, liquors, and beverages.....	60,328	10,192	Textile materials, and products of.....	9,530,874	1,937,132
Preserves, cakes, and sweets.....	494,076	2,211	Rubber, gutta-percha, and products thereof.....	287,791	63
Waste products and offals.....	38,160	74,247	Railway cars, automobiles, boats.....	754,612	4,594
Fuel.....	638,779	35,443	Machines, apparatus, and instruments.....	3,816,953	45,068
Chemical products.....	375,589	1,550	Toys and small wares.....	258,039	200
Tanning and dyeing materials, colors, and varnishes.....	482,750	54,348	Works of art.....	191,999	10,918
Resins and gums.....	985,970	805	Gunpowder, explosives, and munitions of war.....	1,059,494	.....
Oils, fats, wax, and products thereof.....	1,558,536	2,893	All other articles.....	257,790	166
Medicinal materials and drugs.....	210,526	213			
Perfumery and toilet articles.....	80,475	1,072,183	Total.....	34,229,844	24,907,075

Textiles are by far the largest single item of goods purchased abroad, followed by metals and metallic products; machinery; provisions and groceries; hides, skins, and manufactures thereof; and oils, fats, and wax, in the order named. Cereals constitute the bulk of the exports, followed by animal products, textile materials (chiefly silk cocoons, raw wool, and coarse woolen goods), and perfumery.

SHARE OF PRINCIPAL NATIONS IN BULGARIA'S TRADE.

The distribution of Bulgaria's foreign trade in 1906 and 1910 may be seen from the following statement of imports and exports, by countries:

Countries.	Imports.		Exports.	
	1906	1910	1906	1910
Austria-Hungary.....	\$5,365,786	\$9,181,396	\$1,582,600	\$1,510,804
Belgium.....	594,054	1,641,851	3,887,406	4,042,192
France.....	1,036,989	2,962,164	1,732,561	1,744,527
Germany.....	3,131,425	6,585,160	2,974,130	2,744,074
Greece.....	43,232	80,253	1,876,153	1,223,620
Italy.....	1,069,799	1,320,699	753,665	350,874
Netherlands.....	121,204	327,521	18,914	227,161
Roumania.....	649,445	1,268,589	216,353	167,717
Russia.....	897,257	1,324,945	59,058	58,093
Servia.....	271,744	439,110	112,712	77,972
Switzerland.....	213,844	297,220	121,783	39,372
Turkey.....	3,484,036	4,057,632	4,187,907	8,546,619
United Kingdom.....	3,782,993	4,377,626	2,892,105	2,955,795
United States.....	89,745	164,822	264,796	215,581
All other countries.....	183,929	200,856	1,432,446	1,002,674
Total.....	20,935,482	34,229,844	22,112,589	24,907,075

In the import trade Austria-Hungary ranks first, Germany second, the United Kingdom third, Turkey fourth, and France fifth, while Belgium, Russia, Italy, and Roumania have a considerable amount of trade. Formerly England held second place, but in recent years this position has been taken by Germany. British goods are well known in Bulgaria, but because English manufacturers have not catered to the demands of the people as carefully as the Germans the latter have succeeded in capturing a large part of the trade which the British had previously enjoyed.

The United States has only a small share of the trade, but the amount is steadily increasing. Statistics for 1911 have not yet been published, but during the first quarter of that year the imports from the United States were \$60,000 more than in the corresponding period of the preceding year. Bulgarian statistics show only the direct trade with the United States, but American goods are distributed from central points in other European countries, such as London, Paris, Berlin, Vienna, and Fiume, and they are credited to the nation from which final shipment is made rather than to the country of origin. One man told me that he bought a number of American articles each year, but that he always bought from London, from which place the goods were shipped. Another stated that all the agricultural implements of American manufacture that he bought were shipped from Fiume.

DIRECT TRADE WITH THE UNITED STATES.

The following table, compiled from Bulgarian statistics for 1910, shows the direct trade with the United States, and gives an idea of the American merchandise sold here and the Bulgarian goods that find a market in the United States. Among the articles of export is

coarse woolen cloth called "chayak," which is ultimately consumed by Bulgarians in the United States.

Articles.	Value.	Articles.	Value.
IMPORTS.		EXPORTS.	
Agricultural machinery.....	\$110,273	Attar of roses.....	\$139,419
Sewing machines.....	17,394	Copper ore.....	32,758
Steam engines and traction engines....	13,224	Goat and lamb skins.....	25,828
Miscellaneous machinery and tools....	10,050	Leaf tobacco.....	12,555
Automobiles.....	2,161	Coarse woolen cloth.....	4,222
Metals and metallic articles.....	2,056	All other articles.....	799
Molasses and sirups.....	1,963		
Shoes and shoe leather.....	1,718		
Furniture.....	1,156		
Cotton manufactures.....	1,021		
Petroleum and unrefined oil.....	900		
Cottonseed oil.....	444		
All other articles.....	2,465		
		Total.....	215,581
Total.....	164,822		

SALES OF AMERICAN MACHINERY.

The total value of all the agricultural machinery imported in 1910 was \$508,763, of which Austria-Hungary furnished \$176,094, the United Kingdom \$114,062, and the United States \$110,273. As a large part of the Austro-Hungarian imports were shipped from Fiume, which is a distributing point for American goods, it is safe to assume that the United States holds second position at least, and it was the opinion of many dealers in agricultural machinery that American farming machinery and implements are more largely used than those of any other country. The fact that there are not many large farms in Bulgaria, the land being divided up among a number of small owners, has been an obstacle to the sale of reapers, steam plows, tractors, and other high-priced machinery. In some parts of the country, however, large holdings are becoming more numerous, and, even if the farmer is not well-to-do, he may be able to purchase improved implements through credit extended by the Banque Agricole. The latter is an institution for the particular benefit of the farmers, to whom its loans in 1910 exceeded \$5,000,000.

American thrashing machines are much preferred, because they are considered more practical. Formerly American thrashers were not sold, because they did not have an attachment for bruising the straw. This defect has now been remedied, and the attachment on the American machines is claimed to be superior to all others and puts the straw in such shape that it can readily be used for cattle feed. Steam plows are rare, but recently there have been some inquiries for them. The ground in most parts of the country is very hard, and plows must be specially adapted to prevailing conditions. This the Germans have done, and they now have a practical monopoly of the horse-plow trade in Bulgaria. There is a splendid market for mowers, corn shuckers and shellers, and small farming implements and tools; moreover, the demand is rapidly growing because of the increasing agricultural production of the country.

American interests appear to be insufficiently represented, and the field has not been given the attention it deserves. A number of firms

in Bulgaria would like to represent American dealers and manufacturers, but it is a difficult matter to establish satisfactory business relations except by sending a representative here to demonstrate the good qualities of the machines and implements and to make the changes necessary to adapt them to the country. Of Bulgaria's total area of 24,380 square miles, more than one-third is under cultivation, and 75 per cent of the total population of 4,317,000 are engaged in agricultural pursuits. Only in recent years have the peasants begun to adopt modern methods of cultivation, and primitive and antiquated tools are still largely used.

There is also a splendid opportunity in Bulgaria for the sale of small steam and oil engines for use in the numerous small industries, such as flour mills, sawmills, brickmaking works, shoe factories, and chemical works. The engines generally required are those of 10 to 30 horsepower, and an engine using crude oil for fuel is very popular, owing to the fact that a good supply of oil is obtainable in Roumania.

COTTONSEED OIL—BUILDING MATERIALS.

The greatest opportunity to increase American trade here at present is in cottonseed oil. Until quite recently Bulgaria absolutely prohibited the importation of this oil for edible purposes, on account of the prevalent opinion that it was harmful. Owing largely to efforts of the American chargé d'affaires the restrictions have now been removed, and a customs duty of 15 francs per 100 kilos (\$1.318 per 100 pounds) on edible cottonseed oil and 5 francs per 100 kilos (\$0.438 per 100 pounds) when it is denatured is levied. The tariff on olive oil, the nearest competing article, is 10 francs per 100 kilos (\$0.88 per 100 pounds) if in barrels or jars and 18 francs per 100 kilos (\$1.58 per 100 pounds) if in bottles. The United States enjoys the most-favored-nation treatment in the tariff, and there is no discrimination against cottonseed oil, as in the case of Roumania.

Nearly all the business firms I visited in connection with the subject stated that large quantities of this oil can be sold here, and they were anxious to secure the agency for American cottonseed oil manufacturers. It is highly important, however, that generous samples be sent, because it is a new and untried article, and a certain amount of local prejudice must be overcome. One or two dealers wrote to American manufacturers requesting samples, and the request was complied with only to the extent of mailing small bottles of the oil, which were totally inadequate for the purpose desired. [The names of firms desiring to represent cottonseed oil manufacturers may be obtained from the Bureau of Manufactures.]

Furniture and building materials are very much in demand. Bulgaria became an independent nation only in 1908, but the progress of the country in recent years has been marvelous. Within the past few years country districts have been connected with the business centers by telegraph, railroads have been constructed, steamship lines inaugurated, and hotel accommodations perfected. In three decades the nation has built more than 5,000 schools, in which more than 500,000 pupils are instructed. It has established and now maintains a standing army of 120,000 men, and has built more than 1,500 miles of railway. Foreign commerce has increased nearly threefold since 1880. The

country's agricultural products are being sold in all parts of Europe, while the attar of rose industry in the "rose valley" of Tunja is world renowned. Sofia, the capital of the country, is to-day a modern city, with broad, attractive boulevards, well-paved streets, and buildings that would do credit to a much larger city. It is one of the chief commercial centers in the country, and the population between 1905 and 1910 increased from 82,000 to 102,000. Much building is going on, and there is a market for all kinds of building materials, particularly for wire nails, hardware, tools, flooring, roofing, heating apparatus, electrical supplies, paints and varnishes, and office furniture. An important dealer in Sofia stated that there is a large demand for wire nails and that the American product is preferred above all others.

WIDENING OF MARKET—FACTORS FAVORING AMERICAN TRADE.

The improved condition of the Bulgarian people under the new régime has widened, and will continue to widen, the markets for goods in all lines. American shoes are just beginning to be sold here, and American rubbers and goloshes, which are worn very generally in the winter, are preferred. There is a demand for a cheap, substantial automobile. Nearly 100 American cars have been sold here by one agent. American starch, glucose, and dextrine are on this market, but business can undoubtedly be increased. Several firms are anxious to form connections with American manufacturers of these articles. Other things that can be sold are small pumps, silver-plated ware, kitchen utensils, upper leather for shoes, leather belting, lubricating oil and greases, steel rails, and tools of all kinds.

Several factors seem to favor the development of American trade in Bulgaria, foremost of which is the good reputation that our products enjoy. The few goods now sold here have won considerable favor, and business firms are eager to sell American merchandise. Another factor is the emigration from Bulgaria to America, the statistics showing that in 1907 (the latest figures available) 17,350 persons left Bulgaria for the United States. The United States is one of Bulgaria's chief customers for two of its principal exports—copper and attar of roses. Furthermore, American influence has been felt in the country by reason of the fact that a number of Bulgarians have been educated at Roberts College, an American institution in Constantinople. American missions and schools have been established in the country and are playing no small part in the development of the nation.

There is no obstacle to the extension of American trade in Bulgaria, and there is every reason to believe that it might be considerably augmented. However, it is well to call attention to the fact that American goods are to a large extent unknown, and the same care must be exercised, the same methods adopted, as in the introduction of any new and untried article. The indifference of American manufacturers and their failure to appreciate this fact have discouraged many Bulgarian firms who have endeavored to do business with them. Requests for information are often replied to by a circular or mimeograph letter. Catalogues are sent, printed in English and with prices in dollars, making them practically valueless to in-

quirers who are unfamiliar with our language. In discussing the latter point, one man stated that it was not difficult to find some one to translate letters and catalogues, but not infrequently the matter was of such a nature that he did not feel inclined to show the letters to an outsider who, if the proposition was a good one, might take up the matter himself. French is taught in all the State schools, and correspondence and catalogues to be understood should be in French or in German, while quotations should be in francs, the Bulgarian lev having the same value as the franc (\$0.193). Weights should be in kilos, because the metric system is in general use, and tariff duties are levied in accordance with it. When weights are given in pounds it causes considerable confusion and sometimes loss, because the customs authorities impose heavy penalties for false statements of weights.

AGENCIES—CREDIT TERMS.

The practice of giving a general agency for the Levant and the Near East has hindered the extension of American trade here. Bulgarian firms desire to deal with the manufacturers direct, and they seem to be particularly averse to dealing through agents in Constantinople. In efforts to secure business here American manufacturers should realize that while we have seemingly regarded Bulgaria as an unimportant field for trade, other nations have been exploiting the market, and competition is becoming sharper all the time. The English secured their trade by canvassing the country thoroughly and by extending long credits. But even after they ascertained the particular requirements of the people they failed to cater carefully to them and insisted that the Bulgarian customers purchase goods manufactured to meet British conditions and tastes rather than those adapted to Bulgaria's people. German manufacturers, on the contrary, have endeavored to please the peculiar tastes of the people and to suit their products to conditions obtaining here. In addition they offer as liberal terms as the English. As a result of this policy German trade is steadily increasing, while that of England is growing much less rapidly than formerly.

It is very difficult to do business in Bulgaria on a cash basis, because wholesale dealers and importers are obliged to extend credit to their customers. American goods paid for on date of shipment do not arrive here until at least two months later, and when disposed of are sold on terms of six months' credit. It is therefore eight months at the least before the buyer receives any return on his outlay. Several business men expressed a willingness to pay for goods on arrival or to pay in 30 days after shipment through a bank in Bulgaria, and it is believed that considerable business might be done on this basis. A number of firms here that are strong financially do not consider it a good and fair investment to pay for goods on which they receive no return for eight or nine months.

COTTON-GOODS TRADE.

Of the textiles imported by Bulgaria cotton manufactures are by far the largest and most important item, forming more than 50 per

cent of the total. The following table shows the value of the various classes of textiles imported in 1910:

Articles.	Value.	Articles.	Value.
Raw cotton and waste	\$291,397	Cocoons and raw silk.....	\$1,253
Cotton yarn and thread.....	2,128,244	Silk yarn.....	23,408
Cotton cloth and miscellaneous goods..	2,903,996	Silk goods.....	266,568
		Silk clothing.....	35,059
Total.....	5,323,637	Total.....	326,288
Raw and combed wool.....	431,650	Mixtures.....	582,354
Woolen yarn.....	432,109	Ties and cravats.....	11,570
Woolen goods.....	1,134,556	Corsets.....	18,353
Woolen clothing and lingerie.....	138,626	Hats, caps, and millinery.....	274,411
Total.....	2,136,941	Artificial flowers.....	22,240
Raw hemp, flax, and jute.....	76,267	Hair and hair products other than wool.	16,240
Yarn of flax, hemp, and jute.....	245,368	Total.....	925,168
Cloth and bags of flax, hemp, and jute.	494,369	Grand total.....	9,530,874
Clothing and lingerie.....	2,836		
Total.....	818,840		

The bulk of the woolen goods purchased abroad consists of medium and fine qualities, Germany and Austria-Hungary supplying more than 80 per cent while the United Kingdom ranks third in the trade. All the coarser grades are manufactured in Bulgaria, principally by peasants on their hand looms or in the numerous small factories. There are 35 or 40 factories, with a total capital of \$675,000 and employing 3,000 operatives.

Linen goods come mostly from France, while the United Kingdom, Austria-Hungary, and Italy are the chief suppliers of hemp and jute bags and twine. France, Switzerland, and Austria-Hungary, in the order named, dominate the trade in silks.

SOURCE OF COTTON-GOODS IMPORTS.

The following table shows the value of the imports of cotton and its manufactures in 1910, by articles and countries:

Articles.	United Kingdom.	Austria-Hungary.	Italy.	Turkey.	Germany.	Other countries.	Total.
Raw cotton.....	\$135,527	\$1,175	\$248	\$86,676	\$102	\$48	\$223,776
Cotton waste.....	396	15,553	1,282	1,176	923	456	19,786
Cotton, carded or combed.....		132				25	157
Cotton wadding.....	167	23,717	18,858	2,056	1,395	1,485	47,678
Total.....	136,090	40,577	20,388	89,908	2,420	2,014	291,397
Cotton yarn:							
Single—							
Gray—							
Up to No. 12.....	62,606	37,485	241,059	265,975	1,036	15,475	623,636
No. 12 to No. 30.....	472,185	12,075	134,097	4,398	5,283	1,319	629,357
Above No. 30.....	2,521	9			421	395	3,346
Bleached or dyed—							
Up to No. 12.....	95,258	48,951	54,928	3,730	10,181	7,267	220,315
No. 12 to No. 30.....	193,341	4,292	10,891	22	2,742	4	211,292
Above No. 30.....	44,222	452	301		1,375	12	46,362
Twisted, gray, bleached, or dyed.....	44,995	97,797	44,573	202	48,179	3,189	238,935
Sewing thread.....	72,819	19,377	5,509	375	39,471	9,384	146,935
Lamp wicks.....		2,691			747	156	3,594
Twine and cord.....	951	1,409	114	46	1,393	559	4,472
Total.....	988,898	224,538	491,472	274,748	110,828	37,760	2,128,244

Articles.	United Kingdom.	Austria-Hungary.	Italy.	Turkey.	Germany.	Other countries.	Total.
Cotton cloth:							
Coarse—							
Gray.....	\$47,489	\$570	\$11,576	\$463	\$62	\$816	\$60,976
Bleached or dyed.....	107,833	67,077	88,877	3,803	31,051	38,189	336,830
Fine—							
Gray.....	106						106
Bleached.....	245,547	31,322	11,393	1,055	2,989	2,840	295,146
Colored.....	188,037	140,974	49,622	890	47,651	9,609	436,783
Printed goods, calico, barchent, and printed flannels.....	423,681	287,258	95,828	14,193	100,243	98,394	1,019,597
Cotton velvet.....	17,376	20,332	990	19	21,548	35,215	95,480
Head shawls.....	1,856	3,149	8	34,168	1,186	6,004	46,371
Shawls, girdles, and turbans.....	75	5,646	125	6,994	1,675	1,821	16,336
Tissues for curtains.....	3,138	4,539		43	520	864	9,104
Bed and table covers, towels, napkins, and handkerchiefs:							
Of cotton.....	64,228	36,756	2,262	7,391	18,205	12,058	140,900
Of cotton mixtures.....	366	2,749	109	26,455	907	1,248	31,834
Sheets, pillows, and mattresses.....	30	241		1,651	140	127	2,189
Laces and embroideries:							
Of pure cotton.....	19,311	39,533	1,537	280	43,672	23,519	127,852
Of mixtures.....	241	4,112	1	290	8,688	2,487	15,819
Cotton trimmings and buttons.....	476	13,681	7,675	242	13,542	2,489	38,105
Materials for surgical dressings.....	2	13,900	1,437	3	6,098	965	22,405
Gloves, hosiery, and knit goods.....	229	10,556	906	159	32,520	2,451	46,821
Cotton tissues, mixed with silk, linen, wool, etc.....	5,047	8,377	14,956	9,627	9,531	7,519	55,057
Cotton clothing.....	491	21,427	22	677	9,892	9,002	41,511
Cotton lingerie.....	159	50,814	754	522	7,379	5,146	64,774
Total.....	1,125,718	763,013	288,078	108,925	357,499	260,763	2,903,996
Grand total.....	2,250,706	1,028,128	799,938	473,581	470,747	300,537	5,323,637

Included in the item "other countries" are imports from France valued at \$100,183, chiefly velvets, fine cotton goods, and damask; and from Switzerland \$59,190, mainly laces and embroidery and coarse colored goods. Other nations sharing in the trade are Russia, Spain, Belgium, and the Netherlands. Imports from the United States were insignificant and consisted of coarse gray cloth valued at \$791 and fine colored goods valued at \$114.

METHODS FOLLOWED BY DIFFERENT COUNTRIES.

The foregoing table enables one to comprehend at a glance the varieties of cotton manufactures sold on this market. The United Kingdom has approximately 40 per cent of the total trade. This predominance is due to the facts that: (1) England was first in the field, its goods are well known, and Manchester firms have had agents here for a number of years who keep in close touch with the market; (2) in certain lines other countries are unable to compete; (3) many of the most important buyers in Bulgaria visit Manchester once or twice each year and buy their cloth direct from the manufacturers and have it bleached, printed, or otherwise converted to suit their particular requirements. Usually a commission merchant is employed, who pays the manufacturer and converter and extends six months' credit to the buyer. The commission man also pays packing and loading expenses, insurance, and freight to Varna or Bourgas, for all of which, including interest charges, he receives 10 per cent commission.

The trade of Austria-Hungary, Italy, and Germany is conducted on a different basis. While many of the manufacturers in those coun-

tries have agents on the ground, entire dependence for business is not placed in them. Salesmen are sent out in the spring and fall with a full line of samples to take orders, liberal terms of credit are given, and small orders are accepted, a policy which has secured much business from smaller firms that are not in a position to buy from England in the manner described. There is, in fact, a disposition to deal with other countries than England whenever possible, because British manufacturers do not conform to local requirements as regards weights and measures. English goods are put up in yard rather than meter folds, and weights are expressed in pounds rather than kilos. This results in more or less confusion, because of the universal use of the metric system and because customs duties are levied by the 100 kilos of weight.

The trade of England extends to practically all lines, but its chief exports to Bulgaria are gray, bleached, and dyed yarn from No. 12 to No. 30, sewing thread, fine bleached and colored goods, and cheap prints and calico. Austria-Hungary furnishes twisted yarn, bleached and dyed single yarn, and the finer grades of colored and printed goods and velvets. Italy supplies coarse yarns and the cheaper varieties of prints and colored goods. Turkey's share of the trade is practically confined to yarn up to No. 12, which comes mainly from Saloniki, head shawls, and fancy table and bed covers, most of which are handmade and elaborately embroidered. Part of the goods credited to Turkey really represents English and Italian goods that have been bought by agents in Turkey and reshipped. Special twist and fancy colored yarns, sewing thread, and the better grades of prints, flannels, velvets, and colored cloth come from Germany.

DOMESTIC PRODUCTION—CLASSIFICATION OF IMPORTS.

As regards quantity, the imports of yarn considerably exceed those of cloth. In 1910, for example, 9,767,325 pounds of yarn were purchased abroad, as compared with 6,364,261 pounds of cloth and miscellaneous manufactures. The large sales of yarn are due mainly to the extensive use of hand looms by peasants. The raw cotton and a small proportion of the yarn imported are used by the local cotton industry. There is one spinning mill and one weaving mill at Varna and a weaving mill at Jamboli. The first and third are financed and managed by Englishmen, while the second is in the hands of a Bulgarian. The looms, however, number only 500 and the spindles 15,000, and the industry at present does not play a very important part in the cotton-goods trade of the country. The production is chiefly the so-called "Americana" cloth, or coarse sheeting.

No distinction is made in the Bulgarian statistics as regards the construction of the cloth. The classification coarse gray goods includes "Americana" and other coarse sheeting and drills, sail cloth (called elken-besi), and canvas. Goods classed as coarse bleached and colored goods include those that have been converted after weaving, such as bleached sheetings, the coarser grades of linings, cambric, muslin, madapollam, tanjibs, tarlatan and similar goods, and the cheaper qualities of calico and cloth dyed in one color. Most of the printed goods, calico, and printed flannels are classed under a separate heading. The item "fine bleached and colored goods" includes

finer muslin, madapollam, and batiste, and such cloth as oxfords, zephyrs, stripes, percale, and fine figured goods.

TRADE IN GRAY GOODS.

Much of the coarse gray goods consumed in the country is supplied by the peasants themselves, imports being confined to T cloth, long cloth, drills, and a sheeting usually known as "cabot," an imitation of a well-known American brand. T cloth is usually 24 yards long and 32 to 34 inches wide, with from 48 by 48 to 56 by 56 threads per inch and with the usual colored stripe head end. There is no special preference as regards the kind of heading, but practically all that I examined had the national colors (red and green), each color being about 1 inch wide on the cloth. The bulk of this class of goods comes from Manchester.

The so-called "cabots" are usually put up in 40-yard lengths, are 34 to 40 inches wide, and retail at 18 to 20 francs (\$3.48 to \$3.86) per piece, or 8.7 to 9.6 cents per yard. While some of these goods seem to be of fairly good quality, they are generally inferior to the genuine article. They come mostly from Italy and England. The real American "Cabot" brand is little known on the market, and dealers with whom I talked were apparently surprised to learn that the word originated in the United States. One prominent importer stated that the name had been brought in by the Turks, a large number of whom live in Bulgaria. I showed samples of the genuine "Cabot A" brand to the trade, and the opinion prevailed that it was superior to the article sold here and that it could compete as regards price. The tariff on this class of goods is 40 francs per 100 kilos, or 3.5 cents per pound. The imitations of the original brand are poor and are not calculated to deceive anyone who has seen the American Cabot. I saw goods marked "Cabots," "Prima Cabots," etc., but the words usually appeared in rather small letters at the middle or bottom of the outside fold, and in no respect did they resemble the brand on the original.

CLASSES OF IMPORTED GOODS IN GREATEST DEMAND.

By far the larger part of the cotton goods imported by Bulgaria consists of prints and calicoes, flannels, and barchent (a flannel napped on one side and printed on the other). Generally speaking, the peasants, who form the bulk of the country's population, adhere to the native costume. The women wear elaborately embroidered blouses and skirts, with undergarments of cotton, the former of hand manufacture. Head shawls and coarse, fancy-colored stockings are knitted at home. However, an increasing number of these people are beginning to buy cheap printed goods for summer and flannelets or barchent for winter, reserving their native costumes for fêtes and holidays.

All of the nations share in the trade, but England and Italy predominate in the cheaper grades, which are most widely used, while the better qualities come from Austria-Hungary and Germany. The goods are usually packed in 40 or 45 meter (43.7 or 48.3 yard) pieces and are put up in both long and narrow (book) folds. They are

27 to 30 inches wide, weigh 6 to 8 yards per pound, and generally have a stiff finish. Prices range from 40 centimes per meter (7 cents per yard) for the cheaper grades to 70 and 80 centimes per meter (12.3 and 14.1 cents per yard) for the fine qualities. Blue in all shades and red are the most popular colors. Another variety of print or piece-dyed goods used for women's skirts has a 6 or 8 inch fancy border on one side of the cloth. Sometimes the cloth is dyed in a solid color, with the border printed on the side, a sample of which is furnished. It is of Austrian manufacture, is 35 inches wide, and retails at 80 centimes per meter (14.1 cents per yard). American prints could not be found on the market, although one importer stated that recently he had ordered 500 pieces from a Manchester firm; inquiry disclosed the fact that most of the American cloth reaching Bulgaria is purchased through English agents.

INTRODUCTION OF AMERICAN PRODUCTS.

Among importers the idea prevails that American goods are too high in price to compete, but this opinion appears to be based on hearsay rather than positive information, because American manufacturers do not appear to have made any serious effort to bring their goods to the attention of the trade. Freights from the United States are only slightly higher than the rates from England, the United States enjoys the minimum tariff, and our failure to sell here is due more to indifference and the lack of proper efforts than to natural obstacles. If travelers with complete lines of samples were sent here to canvass the trade and select good resident agents, if they came prepared to quote prices c. i. f. Varna or Bourgas, and if they were willing, when necessary, to accept fairly small initial orders, a satisfactory business could be done in such goods as prints, cheap gingham, flannelets, and denims and cottonades.

Best results could be obtained by permitting the purchaser to pay the invoice on arrival of the goods, through a draft with shipping documents attached consigned to the Imperial Ottoman Bank or the Credit Lyonnaise in Constantinople, both of which institutions have correspondents in Bulgaria. In order to secure a foothold in this market it is essential that American manufacturers meet existing conditions rather than attempt to change these conditions to suit themselves, or make their usual demand of cash on shipment of goods. At present no great volume of business can be done on the latter basis, but this should not deter American manufacturers from entering the market; safe and satisfactory credit arrangements can undoubtedly be made, as they have been by manufacturers in other countries.

American trade in cotton goods and in all other lines is hampered by the fact already mentioned, that frequently the general agency for the Balkans and Turkey is given to a firm in Constantinople or Saloniki. Having secured the agency these representatives not infrequently give very little attention to the development of trade beyond the borders of Turkey. It should be borne in mind that Roumania, Bulgaria, and Servia are three separate and distinct countries, with different languages, different customs, and different tastes. The people are more or less suspicious of foreigners, and whenever possible it is advisable to do business through a native Bulgarian, Roumanian, or Servian agent.

KNIT GOODS AND MISCELLANEOUS MANUFACTURES.

What has been said of piece goods applies also to miscellaneous cotton manufactures and small wares. While the trade in the former is the larger, the demand for small wares is gradually increasing. Underwear and the very coarse grades of hosiery are still made at home by the peasants; for the finer grades of hosiery and knitted gloves the people depend on purchases from abroad, the bulk of these articles being supplied by Germany. American seamless hosiery selling at 40 to 50 cents a pair would find a good market here, while haberdashery, if put up attractively and well advertised, would undoubtedly find favor with the more well-to-do class of people, who are rapidly increasing in number. One dealer expressed a desire to buy towels and toweling in the piece from the United States. He wanted it in this shape because it enjoys a lower rate of duty than made-up articles. In all these lines American goods, backed by American advertising, would soon bring satisfactory returns.

TRANSPORTATION AND FREIGHT RATES.

There is no direct steamship line between the United States and Bulgarian or other Black Sea ports, and goods for the Balkans are transshipped at Liverpool, Naples, Trieste, Piraeus, or Constantinople. The Johnson Line has fortnightly sailings from Liverpool, and the time of passage to Varna is about four weeks. The rate from Liverpool by this route is now 45 francs (\$8.78) per metric ton. Quicker delivery can doubtless be obtained by shipping via Trieste, Piraeus, or Constantinople. Between each of these ports and points on the Black Sea the Austrian Lloyd maintains a service with sailings every two weeks. From Constantinople to Bourgas or Varna the rate is approximately 10 francs (\$1.93) per metric ton. As the present rate on cotton goods from New York to Constantinople is quoted at 27s. 6d. (\$6.70) per ton measurement, it would appear that American goods can be shipped to Bulgaria as cheaply as English goods. The difference, however, is more real than apparent, because large consignments from Liverpool are frequently shipped at a lower rate than the published tariff. Rates are also lower in the spring, when large cargoes of grain are being shipped to English, Belgian, and German ports, and goods are brought in at a reduced rate to avoid the necessity of the ships returning empty. In 1910, 40 per cent of the imports entered Bulgaria through the port of Varna, 16 per cent through Bourgas, 25 per cent through Sofia, and 13 per cent through Rustchuk, situated on the Danube. The latter is a very important commercial city in Bulgaria, owing to its advantageous geographical position. Goods are brought down the Danube from Austria-Hungary, on the one hand, and up from the Black Sea on the other. As regards the importation of textiles, the rank of the principal cities was Varna, Sofia, Rustchuk, Phillippopolis, and Bourgas, in the order named.

CUSTOMS DUTIES.

Customs duties in Bulgaria are specific and are levied on the net weight of the goods. The amount of tare to be deducted on various articles is specifically stated and ranges from 5 to 6 per cent in the

case of cotton manufactures. The rates of duty on cotton and cotton goods under the conventional tariff, which applies to merchandise from the United States, are as follows:

Articles.	Rate of duty per 100 kilos.	Rate of duty 100 pounds.
	<i>Leva.</i>	
Cotton, raw or carded, and cotton waste.....	20	\$1.75
Cotton yarn, single, unbleached, undyed:		
Up to No. 14.....	25	2.19
No. 15 to No. 24.....	25	2.19
Above No. 24.....	40	3.50
Cotton yarn, twisted, unbleached, undyed:		
Up to No. 14.....	28	2.45
No. 15 to No. 24.....	30	2.63
Above No. 24.....	50	4.38
Cotton yarn, single or twisted, bleached:		
Up to No. 24.....	35	3.07
Above No. 24.....	55	4.82
Cotton yarn, single or twisted, dyed or printed:		
Up to No. 24.....	45	3.94
Above No. 24.....	65	5.69
Sewing thread, in hanks:		
Bleached.....	36	3.16
Dyed.....	60	5.25
Sewing thread, in balls or on bobbins.....	90	7.88
Cotton fabrics:		
Unbleached, undyed.....	40	3.50
Bleached or dyed after weaving, in one color.....	55	4.82
Lawn and other fabrics for lining.....	35	3.07
Cotton fabrics, such as gauze, tarlatan, batiste, and similar goods.....	55	4.82
Cotton fabrics, manufactured with dyed yarn, such as oxfords, vocasines, stripes.....	65	5.69
Cotton printed goods, including flannels, calico, percaline, cretonne, printed handkerchiefs, and printed reps.....	75	6.57
Printed flannelets weighing from 140 to 200 grams per square meter (4.13 to 5.9 ounces per square yard).....	70	6.13
Light fabrics, embroidered, gray, bleached, dyed or printed.....	100	8.75
Printed head shawls.....	300	26.26
Cotton velvets and plushes.....	140	12.25
Curtains, towels, sheets, and similar articles, made up, bleached or dyed.....	100	8.75
Shawls, girdles, and turbans.....	175	15.34
Cotton knit goods.....	225	19.69
Cotton trimmings, braids, and ribbons.....	190	16.64
Laces, tulle, and embroidery.....	350	30.64
Made-up articles of cotton.....	(1)	(1)

¹ Four times the duty on the material.

SERVIA.

GENERAL TRADE CONDITIONS.

In area and in the value of its foreign trade Servia is the smallest of the three Balkan States. The area of the country is 18,650 square miles, or about one-half that of the State of Indiana, and the population is 2,700,000. More than 80 per cent of the people are dependent on agriculture, and only about 350,000 live in towns. The principal products are corn, wheat, barley, oats, hemp, and plums and other fruits. The land is divided up into a number of small farms, the holdings of the peasants varying in size from 10 to 30 acres.

Servia has considerable mineral resources, including coal, copper, lead, gold, and silver, but the development of the mining industry has been retarded by lack of capital, the bad condition of the country roads, and the absence of an extensive system of railways. More than half the copper output is purchased by the United States, the exports thereto in 1910 being valued at \$824,000. The mines now worked yield a good profit, and it is the opinion of experts who have visited the country that the field offers splendid opportunities to a company that will undertake to provide means of transportation and mine the copper by the most improved methods. Several small industries are carried on, most important of which is flour milling. There are also breweries, sugar works, shoe factories, and several textile weaving mills. For the establishment of industries the Government grants concessions that provide for free land for building sites, exemption from customs duties on machinery and raw materials, reduced freight rates on railways, and the privilege of filling Government contracts at rates 10 per cent higher than the average. However, in spite of these privileges, development along industrial lines has been inconsiderable, and Servia remains primarily an agricultural country.

Belgrade, the capital, has a population of 85,000 and is the chief commercial center, the only other town of importance being Nisch, with 22,000 inhabitants. The Servian language is used throughout the country, but German is spoken by practically all the business men and merchants. The metric system was adopted in 1875 and has been in general use since 1883. The Servian dinar is equal in value to a franc (\$0.193).

SERVIA'S FOREIGN TRADE.

The total foreign trade of Servia in 1910 was valued at \$35,135,147, imports being \$16,146,258, and exports \$18,988,889. Of the imports Germany supplied 41.3 per cent, Austria-Hungary 19 per cent, the United Kingdom 13.49 per cent, Turkey 7.01 per cent, and Italy 4.30 per cent. Servia's principal customers are Turkey, Germany,

Austria-Hungary, Belgium, Roumania, the United States, and Bulgaria, in the order named. Formerly Austria-Hungary had the bulk of the trade in both imports and exports, but owing chiefly to tariff controversies conditions have changed, and first position is now held by Germany. In 1905, for example, the imports from Austria-Hungary amounted to 60 per cent of the total, and the exports to Austria-Hungary 89 per cent, while the corresponding figures in 1910 were 19.07 and 18.11 per cent.

The value of the exports to the United States in 1910, as shown by consular invoices, was \$907,624, as compared with \$125,323 in 1906. Copper constitutes the bulk of the exports, other articles being plum jelly, regulus of antimony, and goatskins. Servian statistics give the value of the imports from America in 1910 as \$202,250, but this includes only direct trade. As most of the American goods brought into Servia are purchased through German and Austrian agents the figures are misleading. Cottonseed oil is the chief article of American manufacture that finds a market in Servia. Since the lowering of the duty on this oil several years ago the total imports have increased considerably, the value being \$100,600 in 1910, as compared with only \$5,602 in 1907. Of the former amount only \$59,800 was credited to the United States, but it is safe to assume that at least 75 per cent of the oil imported originated in the United States. The present conventional rate of duty on cottonseed oil is 20 francs per 100 kilos (\$1.75 per 100 pounds) or only 2 francs per 100 kilos (\$0.175 per 100 pounds) higher than the rate on olive oil. Other American articles sold here are leather, sewing machines, lubricating oil, typewriters, office furniture, hardware, tools and kitchen utensils, cash registers, and boots and shoes. Several American automobiles have also been purchased, but the poor condition of the country roads and the streets in the towns do not make Servia a good field for the sale of motor cars.

The principal articles exported from Servia in 1910 were: Corn, \$4,381,073; wheat, \$2,496,257; barley, oats, and rye, \$1,102,816; live animals, \$1,936,257; dried plums, \$2,102,262; copper, \$1,596,217; animal products, \$1,347,381; hides and skins, \$708,171; preserved plums, \$568,699; eggs, \$443,336.

COTTON-GOODS TRADE.

Servia's imports consist mainly of manufactures, cotton goods being the leading item. The total imports and exports and the imports of cotton manufactures in recent years are shown in the following table:

Trade.	1905	1906	1907	1908	1909	1910
Total imports.....	\$11,120,128	\$8,865,728	\$14,116,665	\$14,597,635	\$14,192,272	\$16,146,258
Total exports.....	14,399,254	14,320,819	16,011,406	15,005,572	17,945,479	18,988,889
Imports of cotton manufactures.....	1,656,807	1,548,830	2,902,559	2,596,693	2,159,180	2,980,726

Other textiles imported in 1910 were wool and woollen manufactures, valued at \$1,169,394 (mainly from Germany); silk manufactures, \$283,793 (from Germany, Switzerland, and Italy); linen goods, \$111,817 (from England and Germany).

QUANTITY AND VALUE OF IMPORTS.

The following table shows the amount and value of cotton and its manufactures imported in 1910:

Articles.	Pounds.	Value.
Carded and combed cotton and cotton waste	180,760	\$16,368
Yarn:		
Single—		
Up to No. 8—		
Unbleached.....	223,209	34,976
Bleached.....	204,349	37,730
Dyed or printed.....	67,435	10,323
No. 9 to 20—		
Unbleached.....	2,799,375	551,385
Bleached.....	623,342	121,728
Dyed or printed.....	244,365	48,995
No. 21 to 30—		
Unbleached.....	884,792	187,661
Bleached.....	570,982	134,846
Dyed or printed.....	30,417	6,711
Above No. 30—		
Unbleached.....	19,559	3,180
Bleached.....	65,497	21,027
Dyed or printed.....	13,331	3,204
Twisted—		
Unbleached.....	38,546	8,257
Bleached.....	104,955	25,101
Dyed or printed.....	31,290	7,083
Sewing and embroidery thread.....	588,135	212,176
Total.....	6,509,579	1,414,383
Fabrics:		
Weighing more than 120 grams per square meter (3.54 ounces per square yard) and having in 1 square centimeter (0.155 square inch)—		
Up to 50 threads.....	1,674,662	509,791
From 50 to 80 threads.....	607,812	239,856
More than 80 threads.....	156,588	71,271
Weighing from 60 to 120 grams per square meter (1.77 to 3.54 ounces per square yard) and having in 1 square centimeter—		
Up to 50 threads.....	191,291	65,522
From 50 to 80 threads.....	589,891	274,085
More than 80 threads.....	37,933	26,080
Weighing up to 60 grams and having in 1 square centimeter—		
Up to 50 threads.....	58,458	25,744
From 50 to 80 threads.....	21,030	19,212
More than 80 threads.....	1,949	2,711
Handkerchiefs, head covers, and shawls.....	117,037	76,275
Velvet and plush.....	78,019	60,778
Tulle, bobbinet, etc.....	18,675	14,128
Knit goods, all kinds.....	17,605	16,460
Laces and embroideries.....	39,776	80,875
Ribbons.....	26,224	23,191
Trimmings and buttons.....	12,183	9,815
All other manufactures.....	66,189	34,081
Total.....	3,715,322	1,549,975
Grand total.....	10,405,661	2,980,726

TRADE IN YARN.

In quantity the imports of yarn considerably exceed those of cloth and other goods. In Servia, as in Roumania and Bulgaria, handloom weaving is engaged in extensively, and nearly every peasant has a loom on which, during the winter months especially, the coarser qualities of cotton goods used by the family are woven. The bulk of the yarn imported is 9s to 20s single gray yarn, 12s, 14s, and 16s being in greatest demand. In bleached yarns 16s to 24s are most widely sold. No. 10 English hard twist yarn is quoted at 15 cents per pound and No. 20 at 18 cents f. o. b. Liverpool. Freight and

commission amount to about 15 per cent. Austrian yarn is offered at 17.66 cents for No. 12 c. i. f. Belgrade (duty not included). The wholesale price of No. 14 among the dealers here is 13.50 francs (\$2.60) per 10-pound package.

The yarn is generally wound in skeins and put up in 5 and 10 pound packages. There is also an increasing demand for yarn wound on small pasteboard beams (30 by 5 inches), which makes it more suitable for use on hand looms. The beams usually hold 5 pounds and yarn put up in this manner is sold at 1½ cents per pound more than skein yarn. England supplies more yarn than all other competing nations combined, but recently the Italians have begun to make serious inroads on the monopoly which England has hitherto held. The Italian yarn, though cheaper, is inferior, and most of the merchants expressed a strong preference for the English product.

SOURCE OF COTTON-GOODS IMPORTS.

The share of the various nations in the cotton-goods trade is shown in the following table:

Countries.	Cotton and waste.	Yarn and thread.	Cloth.	Total.
Austria-Hungary.....	\$8, 112	\$195, 644	\$42, 698	\$246, 454
France.....		7, 658	40, 385	48, 043
Germany.....	5, 527	139, 369	631, 474	776, 370
Italy.....	2, 060	144, 480	221, 103	367, 643
Switzerland.....		13, 625	142, 972	156, 597
Turkey.....	182	21, 321	28, 896	50, 399
United Kingdom.....	467	891, 932	400, 559	1, 292, 958
All other countries.....	20	354	41, 888	42, 262
Total.....	16, 368	1, 414, 383	1, 549, 975	2, 980, 726

Germany holds first place in the trade in cloth and miscellaneous manufactures, furnishing more than 40 per cent of the total. In quantity of cloth the United Kingdom is not far behind, the value of Germany's exports being increased by its sales of embroidery, laces, and knit goods. Italy, Switzerland, Austria-Hungary, and France follow the United Kingdom, in the order named. In general, the better grades of gray and bleached goods, cheap prints, and oxfords come from England; the cheaper qualities of gray and bleached goods, barchent, and prints from Italy; the better qualities of prints and flannels from Germany; while the Netherlands also has a share in the finer grades of prints. Austria-Hungary sells fine bleached goods and zephyrs, and Switzerland cheap prints and cottonades, called "materia."

CLASSES OF GOODS IN DEMAND.

The classes of goods sold in Serbia do not differ materially from those imported by Roumania and Bulgaria. Prints are used in summer and barchent and cotton flannels in winter, while gray and bleached goods and, to a less extent, oxfords are in demand throughout the year. In the statistics goods are classed according to construction rather than finish or color. The bulk of the cloth imported consists of fabrics weighing more than 120 grams per square meter and having up to 80 threads per square centimeter and fabrics weigh-

ing from 60 to 120 grams per square meter and having from 50 to 80 threads per square centimeter. Most of the gray sheetings (generally called "Americana") sold are made up like T cloths, with a colored heading. Samples showing the principal headings used are furnished with this report. Merchants state, however, that the heading is not required and that the goods can be sold as readily without it.

There is no standard T cloth, but the most popular construction is 72 by 72 picks, 34 and 38 inches wide, put up in 48-yard lengths. The 34-inch is being bought at the present time (February, 1912) at 12s. 6d. (\$3.04) per piece and the 38-inch at 13s. 8d. (\$3.33). These are Liverpool prices, to which must be added freight and tariff charges amounting to nearly 45 per cent. Another construction is 72 by 56 picks and is made up in various widths—25, 30, 34, and 38 inches. The 25-inch is quoted at \$2.21, the 30-inch at \$2.45, and the 38-inch at \$2.88 per 48-yard piece. A still cheaper sheeting is 56 by 48 picks and 20 to 30 inches wide. This is put up in 24 folds containing 20 yards, the 20-inch being quoted at 55 cents per piece and the 24-inch at 68 cents f. o. b. Liverpool.

Some of the gray sheetings are sold here under the name "cabot" and come from Manchester and from Italy. An English sheeting sold under this brand is furnished in widths of 27 to 36 inches, 35 to 40 yards per piece. It is 48 by 48 picks, and the 27-inch width is sold at wholesale here for 45 centimes (8.68 cents) per yard. Nearly all of the gray goods are heavily filled. English sheeting has been on the market for a long time, is well known, and is sold through agents who are in close touch with the trade.

BLEACHED GOODS.

For a long time England also had a monopoly of the trade in bleached shirtings, but Austria-Hungary and Germany have recently become strong competitors, particularly in the finer grades. The term "madapollam" is used in Serbia to designate a very wide variety of bleached goods and fine muslins. A very good seller along this line is 30 inches wide, 72 by 64 picks, with a stiff finish. It is put up in both narrow book fold and long fold, and the pieces usually contain either 30 to 40 yards or 30 meters. These goods are now being bought from England at 3½d. (7 cents) per yard f. o. b. Liverpool, while a cheaper quality is offered at 5 cents per yard. Both madapollam and the finer grades of bleached goods (called chiffon) are sold in various widths, but the 30, 32, and 36 inch are the most common. They are usually put up neatly and attractively, with two bands and with gilt lettering on the outside fold. Each piece comes wrapped in tissue paper with a heavy black glazed paper on the outside. They are packed in bales, ordinarily of 100 to 200 pieces.

There is a fairly good demand for wide bleached sheetings, or dowlahs, which come chiefly from Italy and Germany. The most popular construction is 56 by 48 picks, 150 centimeters (59 inches) wide, which is quoted at 90 centimes per meter (15.87 cents per yard) c. i. f. Belgrade. The goods also come in widths of 160, 180, 200, and 220 centimeters, or 63, 70.86, 78.74, and 85.6 inches. Tanjibs come mostly from England. They are always in 20-yard pieces, with three narrow stripes in gilt or red as a heading in the middle. The

usual construction is 48 by 48 or 56 by 56 picks, 39 to 40 inches wide, and they are quoted at 5 and 6 cents per yard in Liverpool.

COLORED GOODS.

Prints constitute the chief colored goods imports, and though all of the competing nations share in the trade England furnishes most of the cheaper qualities, which are the most widely sold. Switzerland and Italy also compete in this line, while Germany, Austria-Hungary, and the Netherlands furnish the better grades. Samples showing the most popular patterns, with prices, are furnished with this report. The tendency is toward the darker colors with little white showing, and dark blues and reds with small white dots or designs are very much in demand. Prints are always put up long fold, but they are folded three times before tacking. There is no standard length, but most of the pieces contain 34 to 40 yards; the cheaper grades are rather stiffly finished. While 28-inch prints are most common, the 30-inch width is also sold. The prices at which they are now bought vary from 3 cents per yard for the lower qualities to 7, 8, and 10 cents for the finer grades. Samples that are forwarded will give a clear idea of the range of qualities used.

Flannels and barchent are second in importance to prints. The better grades come from Germany and England, while Italy supplies the cheaper qualities. The former are usually 70 centimeters (27.56 inches) wide and the latter from 57 to 58 centimeters (22.44 to 22.83 inches). The prices range from 38 to 45 centimes per meter (6.7 to 7.93 cents per yard) for the cheaper qualities to 50 to 80 centimes per meter (8.82 to 14.11 cents per yard) for the finer grades c. i. f. Belgrade. Barchent is also made in one of the native mills. There are 4 small weaving establishments in Servia, containing about 800 looms. The product is mainly coarse gray and bleached goods, but recently colored goods, stripes, oxfords, and barchent have been woven. The latter, of course, is made with dyed yarn, as there are no printing works in the country.

Oxfords and vichy cloths (fine ginghams) are also sold here, England, Austria-Hungary, and Germany sharing in the trade. Other cotton goods imported are piqué, nankeen, creton, reps, velvets and corduroy, linings, handkerchiefs, bed and table covers, ready-made clothing, and underclothing and knit goods (mainly from Germany). The trade in any one of these lines, however, is small, and the fabrics already mentioned (gray and bleached goods, prints, flannels, barchent, and oxfords) are the main classes of goods purchased abroad.

SELLING METHODS—CREDITS—TRANSPORTATION AND FREIGHT RATES.

Practically all of Servia's trade is centered in Belgrade, and the cotton-goods business is in the hands of less than a dozen large wholesale dealers there. These firms buy goods abroad and sell them through their own traveling men to small dealers throughout the country. All the principal manufacturers abroad have agents in Belgrade, who call frequently on the wholesalers and, in general, look after the business of their firms. In addition traveling men visit Belgrade twice each year, carrying a full line of samples. These

men make their trips well in advance of the season. Orders for fall goods are taken in December and January and for spring lines in June and July. German, Austrian, and Italian manufacturers usually quote prices c. i. f. Belgrade, while English quotations are usually f. o. b. Liverpool. A commission man in England usually packs and loads the goods, pays the freight from the mill to Liverpool, and extends 6 months' credit to the buyer. For his services he charges from 6½ to 7 per cent commission. Germans and Austrians give 6 months' credit, while Italian manufacturers not infrequently give 9 and 12.

Servia has no seaport, but more than half of the imports are brought down the Danube from Austria-Hungary and Germany. English goods usually come by way of Trieste or Fiume, and the present freight rate from Liverpool to Belgrade by this route is 8.50 francs per 100 kilos (\$0.744 per 100 pounds). Nearly half of this rate (4.20 francs) covers the freight from Fiume by rail to Belgrade. As the freight rate from New York to Fiume or Trieste is only about 27s. (\$6.57) per ton of 40 cubic feet, American manufacturers can land goods in Belgrade as cheaply as the English. Nor is there any great difference in the time of passage. The Austro-Americana line has weekly sailings from New York to Trieste and Fiume, while the Cunard line has two or three per month, with an average time of passage of 17 days. There is no great delay in transshipment, and goods should arrive here in from 5 to 6 weeks. Through bills of lading are issued to Belgrade.

CUSTOMS TARIFF.

Servia imposes a higher tariff on cotton goods than any other non-manufacturing country in the world, the duties averaging from 35 to 40 per cent. The rates are specific and are levied on the net weight, which is determined by deducting from the gross weight an arbitrary tare allowance fixed by law, amounting in the case of cotton goods to 18 kilos (39.7 pounds) for cases and 3 kilos (6.6 pounds) for bales per 100 kilos (220.46 pounds) of gross weight. The United States enjoys the most-favored-nation treatment in the tariff. Following are the conventional rates on the yarn and cloth most widely sold on this market:

Articles.	Rate of duty per 100 kilos.	Rate of duty per 100 pounds.
Yarn, single:		
No. 1 to No. 24—	<i>Dinars.</i>	
Unbleached.....	25	\$2.19
Bleached.....	30	2.63
Dyed or printed.....	35	3.07
No. 24 to No. 30—		
Unbleached.....	35	3.07
Bleached.....	40	3.50
Dyed or printed.....	45	3.94
Above No. 30—		
Unbleached.....	40	3.50
Bleached.....	45	3.94
Dyed or printed.....	50	4.38
Sewing and embroidery thread:		
Unbleached.....	50	4.38
Bleached.....	55	4.82
Dyed or printed.....	60	5.25

Articles.	Rate of duty per 100 kilos.	Rate of duty per 100 pounds.
Fabrics:		
Weighing more than 120 grams per square meter (3.54 ounces per square yard) and having in warp and weft in one square centimeter (0.155 square inch)—	<i>Dinars.</i>	
Up to 50 threads.....	80	\$7. 00
From 50 to 80 threads.....	100	8. 75
More than 80 threads.....	130	11. 38
Weighing from 60 to 120 grams per square meter (1.77 to 3.54 ounces per square yard) and having in warp and weft in one square centimeter—		
Up to 50 threads.....	130	11. 38
From 50 to 80 threads.....	130	11. 38
More than 80 threads.....	190	16. 63
Weighing up to 60 grams per square meter (1.77 ounces per square yard) and having in warp and weft in one square centimeter—		
Up to 50 threads.....	190	16. 63
From 50 to 80 threads.....	220	19. 25
More than 80 threads.....	250	21. 88
Handkerchiefs and shawls.....	120	10. 50
Velvet and plush.....	170	14. 88

NO AMERICAN COTTON GOODS ON THE MARKET.

No American cotton goods are on this market, and dealers stated that no attempt had ever been made to sell them. It is the opinion of the leading dealers that they can be sold, judging by the samples and prices of American cotton cloths that were shown them. To enter this market it is absolutely necessary to extend the same terms of credit (six months) that are offered by competing nations. It is impossible to do business on any other basis; in fact, the head of one firm stated that even if goods were offered at a slightly lower price for cash they would not attract the importers, because the latter are obliged to give long terms to customers in the retail trade.

While it is not advisable to extend credit promiscuously in Servia, there are certain firms which are not only able to meet their obligations, but which also enjoy the highest reputation for commercial integrity. With these men it is a matter of business, pure and simple. They say they are unwilling to advance cash for goods which are nearly two months en route and which they themselves must sell on terms of 6, 8, and even 12 months. Allowing for a reasonable period of time that they hold the goods before selling, importers state that it averages at least 12 months before they get any return on their investment. Unless American manufacturers are willing to meet conditions as they exist here, it is doubtful if any appreciable amount of business can be done.

If a native agent were on the ground to represent the manufacturer and look after his interests in general the demand for credit could doubtless be met easily. The name of a capable man desiring to represent American manufacturers of cotton goods is transmitted with this report [and may be obtained from the Bureau of Manufactures]. However, a traveling representative should visit Belgrade once or twice each year with a full line of samples. He could easily visit the chief commercial centers in Bulgaria, Roumania, Servia, Greece, and Turkey in one trip. Prices should be quoted c. i. f. Belgrade if possible, or c. i. f. Trieste or Fiume. The merchants here have no conception of what quotations f. o. b. New York mean, and it is very difficult to ascertain transportation charges from this side. It would

also be an advantage to quote prices in francs per meter. While the bulk of the cloth comes in yard folds and is sold by England by the yard, the merchant sells by the meter, and it is more or less confusing to him to convert yards and cents to meters and centimes. Competition is rather keen in all lines, and everything possible should be done to make American goods attractive to the buyer. Quotations made in the method mentioned would undoubtedly be a strong factor in securing trade.

COMPLAINTS AS TO AMERICAN METHODS.

Indifference of American manufacturers to inquiries and to the development of their trade in Servia has caused some complaint here. One man, after writing a manufacturer of typewriters and securing prices, sent a remittance to cover the cost of a sample machine, with the intention of taking the agency for it in Servia. It was nine months before the typewriter reached him, the manufacturer's excuse for the delay being that the manager of the export department had been on a vacation. Another man stated that he had ordered an oil engine, sending cash in advance. The order was referred to an agent in London, who turned it over to another agent in Hamburg. The latter sent it on to an agent in Vienna, who in turn forwarded it to an agent in Budapest. It was more than four months before the order was filled. Other persons spoke of having ordered and received catalogues and prices of American goods which were accompanied by a letter expressing the hope that "we may receive a favorable reply;" but when the "favorable reply" was forwarded and an order placed the American manufacturer wrote that "we do not care to do business in Servia."

SUMMARY OF OPPORTUNITIES.

It is a hopeful sign that, in spite of rebuffs and discouragements, the people in the Balkan States are anxious to handle American goods because of the splendid reputation they enjoy. The markets of Roumania, Bulgaria, and Servia are alike in this respect. The merchants are eager to represent and to sell things American. The total annual imports of these three countries amount to \$125,000,000, and the share of the United States is little more than \$1,000,000. The articles purchased abroad are mainly manufactured goods which the United States is in a position to furnish. The splendid reputation that American products enjoy more than any other factor has enabled us to secure the share of the trade we now have. As regards freight rates, American exporters are at no great disadvantage as compared with England, which annually exports to the Balkan States goods valued at nearly \$20,000,000, and whose trade is steadily increasing.

If a serious and determined effort to capture a share of the trade were made, backed by American selling methods and American advertising, the results would no doubt be satisfactory. It would be a splendid move to establish a commercial museum in each of the capitals—Bucharest, Belgrade, and Sofia—with competent men in charge. American goods of all kind could be displayed and orders taken direct by the manager. If a number of firms interested in securing trade were to cooperate in the undertaking the ex-

pense to each manufacturer would not be considerable and good results would undoubtedly follow. Other nations have established such institutions and the returns have been very gratifying. The desire of the people to know more about American goods could be much better satisfied by having samples on display with a man on the spot to demonstrate their good qualities than by sending out catalogues in English, which have no value here aside from an artistic standpoint because they are printed in a language that is no more understood here than the Turkish language is in New York. Although the markets in the Balkans have apparently been neglected by American manufacturers, the present is a most opportune time to enter the field and institute an aggressive campaign for a larger share of the trade.

LISTS OF SAMPLES.

ROUMANIA.

Sample 1.—Nankeen; made in Roumania; 31/32 inches wide; 56 by 56 picks; length of piece, 30 to 35 meters (32.8 to 38.3 yards); put up book fold; 3.25 yards per pound; wholesale price, 12.9 to 13.5 cents per meter (11.81 to 12.34 cents per yard).

Sample 2.—Cottonade, called materia in Roumania; made in Switzerland; 18/19 inches wide; 7.75 yards per pound; length of piece, 50 meters (54.7 yards); wholesale price, 8.29 to 8.68 cents per meter (7.58 to 7.93 cents per yard).

Sample 3.—Flannelet; imported from Austria; 26/27 inches wide; 3 yards per pound; length of piece, 35 to 38 meters (38.3 to 41.5 yards); wholesale price, 16.59 to 17.56 cents per meter (15.17 to 16.05 cents per yard).

Sample 4.—Barchent; imported from Italy; 21/22 inches wide; three-leaf twill; 6.25 yards per pound; length of piece, 40 to 45 meters (43.7 to 49.2 yards); wholesale price, 8.49 to 8.87 cents per meter (7.76 to 8.11 cents per yard).

Sample 5.—Barchent; imported from Italy; 27/28 inches wide; 5 yards per pound; length of piece, 40 to 45 meters (43.7 to 49.2 yards); wholesale price, 11 to 11.58 cents per meter (10.05 to 10.58 cents per yard).

Sample 6.—Piqué; imported from Austria; 27/28 inches wide; 3.7 yards per pound; length of piece, 30 to 35 meters (32.8 to 38.3 yards); wholesale price, 16.4 to 17.37 cents per meter (14.99 to 15.87 cents per yard).

Sample 7.—Oxford; made in Roumania; 26/27 inches wide; 4.75 yards per pound; length of piece, 35 to 40 meters (38.3 to 43.7 yards); wholesale price, 8.87 to 9.26 cents per meter (8.11 to 8.46 cents per yard).

Sample 8.—Print or calico; imported from England; 27/28 inches wide; 7 yards per pound; length of piece, 40 meters (43.7 yards); wholesale price, 8.49 to 8.87 cents per meter (7.76 to 8.11 cents per yard).

Sample 9.—Print or calico; imported from Austria; 27/28 inches wide; 7.5 yards per pound; length of piece, 40 to 45 meters (43.7 to 49.2 yards); wholesale price, 9.45 to 10.03 cents per meter (8.64 to 9.17 cents per yard).

Sample 10.—Print or calico; imported from Austria; 30/31 inches wide; 5.85 yards per pound; length of piece, 40 meters (43.7 yards); wholesale price, 12.54 to 13.12 cents per meter (11.46 to 11.99 cents per yard).

Sample 11.—Madapollam; imported from England; 40/41 inches wide; 56 by 40 picks; 3.7 yards per pound; length of piece, 40 yards exactly; price per piece, \$3.03 to \$3.18; wholesale price, 7.57 to 7.95 cents per yard.

Sample 12.—Madapollam; imported from England; 29/30 inches wide; 64 by 64 picks; 7 yards per pound; length of piece, 40 yards exactly; price per piece, \$2.65 to \$2.75; wholesale price, 6.62 to 6.85 cents per yard.

Sample 13.—Croydon; imported from England; 38/39 inches wide; 52 by 60 picks; 3.75 yards per pound; length of piece, exactly 22 meters (24 yards); price per piece, \$2.70 to \$2.84; wholesale price, 12.28 to 12.91 cents per meter (11.21 to 11.81 cents per yard).

Sample 14.—Croydon; made in Roumania; 32/33 inches wide; 56 by 56 picks; 3.85 yards per pound; length of piece, exactly 22 meters (24 yards); price per piece, \$2.84 to \$2.99; wholesale price, 12.9 to 13.27 cents per meter (11.81 to 12.13 cents per yard).

Sample 15.—Croydon; made in Roumania; 33/34 inches wide; 56 by 56 picks; 4.25 yards per pound; length of piece, exactly 22 meters (24 yards); price per piece, \$2.46 to \$2.60; price per meter, 11.18 to 11.81 cents (10.23 to 20.78 cents per yard).

Sample 16.—Chiffon; made in Roumania; 31/32 inches wide; 76 by 76 picks; 7.5 yards per pound; length of piece, exactly 30 meters (32.8 yards); price per piece, \$3.08 to \$3.23; price per meter, 10.26 to 10.76 cents (9.38 to 9.84 cents per yard).

Sample 17.—Chiffon; made in Roumania; 29/30 inches wide; 76 by 60 picks; 6 yards per pound; length of piece, exactly 30 meters (32.8 yards); price per piece, \$2.56 to \$2.70; price per meter, 8.53 to 9 cents (7.79 to 8.12 cents per yard).

Sample 18.—Chiffon; made in Roumania; 31/32 inches wide; 80 by 80 picks; 4.55 yards per pound; length of piece, exactly 30 meters (32.8 yards); price per piece, \$3.57 to \$3.76; price per meter, 11.9 to 12.53 cents (10.76 to 11.44 cents per yard).

Sample 19.—Long cloth; made in Roumania; 29/30 inches wide; 52 by 52 picks; 7.55 yards per pound; length of piece, exactly 33 meters (36 yards); price per piece, \$2.31 to \$2.41; price per meter, 7 to 7.3 cents (6.3 to 6.54 cents per yard).

Sample 20.—Long cloth; made in Roumania; 32/33 inches wide; 56 by 52 picks; 4.75 yards per pound; length of piece, exactly 33 meters (36 yards); price per piece, \$2.84 to \$2.99; price per meter, 8.6 to 9.06 cents (7.86 to 8.12 cents per yard).

Sample 21.—Long cloth; made in Roumania; 35/36 inches wide; 56 by 52 picks; 4.25 yards per pound; length of piece, exactly 33 meters (36 yards); price per piece, \$2.99 to \$3.13; price per meter, 9.06 to 9.48 cents (8.12 to 8.65 cents per yard).

Sample 22.—Long cloth; made in Roumania; 31/32 inches wide; 56 by 60 picks; 4 yards per pound; length of piece, exactly 33 meters (36 yards); price per piece, \$3.13 to \$3.28; price per meter, 9.48 to 9.93 cents (8.65 to 9.08 cents per yard).

Sample 23.—Long cloth; made in Roumania; 37/38 inches wide; 60 by 60 picks; 3.1 yards per pound; length of piece, exactly 33 meters (36 yards); price per piece, \$3.76 to \$3.95; price per meter, 11.39 to 11.93 cents (10.41 to 10.89 cents per yard).

Sample 24.—Heavy duck (called elken in Roumania); 25/26 inches wide; 28 by 32 picks; 3.6 yards per pound; drawn in two in an eye in the reed; length of piece, 35 to 40 meters (38.3 to 43.7 yards); price, 9.84 to 10.22 cents per meter (8.99 to 9.35 cents per yard).

Sample 25.—Zephyr; imported from England; 29/30 inches wide; 5.67 yards per pound; length of piece, 30 to 35 meters (32.8 to 38.3 yards); price, 10.42 to 11 cents per meter (9.53 to 10.05 cents per yard).

Sample 26.—Zephyr; imported from Austria-Hungary; 30/31 inches wide; 5.5 yards per pound; length of piece, 35 to 40 meters (38.3 to 43.7 yards); price, 8.91 to 9.87 cents per meter (8.14 to 9.03 cents per yard).

Sample 27.—Zephyr; imported from Austria-Hungary; 27/28 inches wide; 7.58 yards per pound; length of piece, 35 to 40 meters (38.3 to 43.7 yards); wholesale price, 12.16 to 12.93 cents per meter (11.11 to 11.81 cents per yard).

Sample 28.—Batiste; imported from England; 30/31 inches wide; 6.69 yards per pound; length of piece, 20 to 22 meters (21.9 to 24 yards); wholesale price, 9.84 to 10.42 cents per meter (9 to 9.53 cents per yard).

Sample 29.—Batiste; imported from England; 25/26 inches wide; 10.12 yards per pound; length of piece, 40 to 45 meters (43.7 to 49.2 yards); wholesale price, 7.14 to 7.52 cents per meter (6.52 to 6.88 cents per yard).

Sample 30.—Print or calico, with fancy border; 29/30 inches wide; 6.5 yards per pound; length of piece, 35 to 40 meters (38.3 to 43.7 yards); wholesale price, 11.96 to 12.54 cents per meter (10.93 to 11.46 cents per yard).

Sample 31.—Printed cashmere; imported from Spain; 26/27 inches wide; 7 yards per pound; length of piece, 35 to 40 meters (38.3 to 43.7 yards); wholesale price, 7.33 to 7.72 cents per meter (6.7 to 7.05 cents per yard).

Sample 32.—Flannelet (called velour in Roumania); imported from Italy; 27/28 inches wide; 3.95 yards per pound; length of piece, 35 to 40 meters (38.3 to 43.7 yards); wholesale price, 13.31 to 14.9 cents per meter (12.17 to 12.87 cents per yard).

Sample 33.—Flannelet (velour); imported from Germany; 27/28 inches wide; 4.32 yards per pound; length of piece, 35 to 40 meters (38.3 to 43.7 yards); wholesale price, 16.4 to 17.17 cents per meter (14.99 to 15.7 cents per yard).

Sample 34.—Flannelet (velour); imported from Germany; 27/28 inches wide; 3.96 yards per pound; length of piece, 35 to 40 meters (38.3 to 43.7 yards); wholesale price, 13.7 to 14.47 cents per meter (12.52 to 13.22 cents per yard).

Sample 35.—Flannelet (velour); imported from Austria-Hungary; 27.5 to 28.3 inches wide; 3.34 yards per pound; length of piece, 35 to 40 meters (38.3 to 43.7 yards); wholesale price, 19.3 to 20.2 cents per meter (17.6 to 18.48 cents per yard).

Sample 36.—Barchent; imported from Austria-Hungary; 27/28 inches wide; 3.6 yards per pound; length of piece, 35 to 40 meters (38.3 to 43.7 yards); wholesale price, 14.66 to 15.63 cents per meter (13.4 to 14.29 cents per yard).

Sample 37.—Nankeen; made in Roumania; 31/32 inches wide; 3.66 yards per pound; length of piece, 30 to 35 meters (32.8 to 38.3 yards); wholesale price, 13.51 to 14.09 cents per meter (12.34 to 12.87 cents per yard).

Sample 38.—Colored domestic; imported from the Netherlands; 27/28 inches wide; 2.98 yards per pound; length of piece, 45 to 50 meters (49.2 to 54.7 yards); wholesale price, 13.51 to 14.28 cents per meter (12.34 to 13.05 cents per yard).

Sample 39.—Sateen; imported from England; 38/39 inches wide; 4.73 yards per pound; length of piece, 40 to 42 meters (43.7 to 45.9 yards); wholesale price, 12.16 to 12.74 cents per meter (11.11 to 11.64 cents per yard).

Sample 40.—Printed sateen; imported from Austria-Hungary; 28.68 to 29.47 inches wide; 6.5 yards per pound; length of piece, 35 to 45 meters (38.3 to 49.2 yards); wholesale price, 13.51 to 14.28 cents per meter (12.34 to 13.05 cents per yard).

Sample 41.—Colored cambric; imported from England; 34.58 to 35.37 inches wide; 6.81 yards per pound; length of piece, 35 to 42 meters (38.3 to 45.9 yards); wholesale price, 8.68 to 9.07 cents per meter (7.93 to 8.28 cents per yard).

Sample 42.—Handkerchief; imported from England, size, 14.5 by 14 inches; weight, 0.56 ounce each; price per dozen, 24.7 to 26.05 cents.

Sample 43.—Head shawl; imported from Switzerland; size, 29.6 by 30.4 inches; weight, 2.04 ounces each; price per dozen, \$1.25 to \$1.31.

Sample 44.—Head shawl; imported from Switzerland; size, 29.6 by 30.4 inches; weight, 2.61 ounces each; price per dozen, \$1.33 to \$1.41.

Sample 45.—Head shawl; imported from Austria-Hungary; size, 28.3 by 28.68 inches; weight, 2.01 ounces each; price per dozen, \$1.15 to \$1.23.

BULGARIA.

Sample 1.—Gray sheeting (called "Americana" in Bulgaria); made in Bulgaria; 46 inches wide; 56 by 56 picks; retail price, 75 centimes per meter (13.22 cents per yard).

Sample 2.—Gray four-leaf twill (called "Americana"); made in Bulgaria; 29 inches wide; 64 by 64 picks; retail price, 65 centimes per meter (11.46 cents per yard).

Sample 3.—Bleached sheeting; made in Bulgaria; 32 inches wide; 64 by 64 picks; retail price, 65 centimes per meter (11.46 cents per yard).

Sample 4.—Bleached sheeting; imported from Austria-Hungary; 56 by 48 picks; retail prices, 82 centimeters (32.28 inches) wide, 80 centimes per meter (14.11 cents per yard); 90 centimeters (35.43 inches) wide, 87 centimes per meter (15.34 cents per yard); 100 centimeters (39.37 inches) wide, 1 franc per meter (17.6 cents per yard); 145 centimeters (57.09 inches) wide, 1.45 francs per meter (25.53 cents per yard); 200 centimeters (78.74 inches) wide, 2.2 francs per meter (38.83 cents per yard); 230 centimeters (90.55 inches) wide, 2.50 francs per meter (44.32 cents per yard).

Sample 5.—Cotton flannel; imported from Austria-Hungary; 28/29 inches wide; retail price, 1.20 francs per meter (21.13 cents per yard).

Sample 6.—Barchent; imported from Austria-Hungary; 27 inches wide; retail price, 1.40 francs per meter (24.65 cents per yard).

Sample 7.—Barchent; imported from Italy; 26 inches wide; retail price, 1 franc per meter (17.6 cents per yard).

Sample 8.—Barchent; imported from Austria-Hungary; 27 inches wide; retail price, 80 centimes per meter (14.11 cents per yard).

Sample 9.—Barchent; imported from Italy; 28/29 inches wide; retail price, 95 centimes per meter (16.75 cents per yard).

Sample 10.—Barchent; imported from Austria-Hungary; 30 inches wide; retail price, 1.10 franc per meter (19.36 cents per yard).

Sample 11.—Print; imported from Germany; 30 inches wide; retail price, 80 centimes per meter (14.11 cents per yard).

Sample 12.—Print; imported from England; 30 inches wide; retail price, 55 centimes per meter (9.7 cents per yard).

Sample 13.—Print for women's skirts; imported from Austria-Hungary; 34/35 inches wide; retail price, 80 centimes per meter (14.11 cents per yard).

Sample 14.—Blue twill goods; imported from Austria-Hungary; 34/35 inches wide; retail price, 1 franc per meter (17.6 cents per yard).

Sample 15.—Fine zephyr; imported from England; 32 inches wide; retail price, 1 franc per meter (17.6 cents per yard).

Sample 16.—Oxford; imported from England; 27 inches wide; retail price, 65 centimes per meter (11.46 cents per yard).

Sample 17.—Oxford; imported from Austria-Hungary; 30 inches wide; retail price, 90 centimes per meter (15.87 cents per yard).

Sample 18.—Fancy piqué, napped on one side; imported from Germany; 30/31 inches wide; retail price, 1.75 francs per meter (30.82 cents per yard).

Sample 19.—Fancy piqué, napped on one side; imported from Austria-Hungary; 26 inches wide; retail price, 1 franc per meter (17.6 cents per yard).

Sample 20.—Cretonne; imported from England; 50 inches wide; retail price, 1.70 francs per meter (29.94 cents per yard).

Sample 21.—Fancy colored twill; imported from Austria-Hungary; 31/32 inches wide; retail price, 75 centimes per meter (13.22 cents per yard).

Sample 22.—Satin; imported from Austria-Hungary; 60 inches wide; retail price, 2.60 francs per meter (45.88 cents per yard).

Sample 23.—Colored twill; imported from Austria-Hungary; 32 inches wide; retail price, 1 franc per meter (17.6 cents per yard).

Sample 24.—Furniture cloth; imported from Austria-Hungary; retail prices: 80 centimeters (31.5 inches) wide, 1 franc per meter (17.6 cents per yard); 90 centimeters (35.43 inches) wide, 1.2 francs per meter (21.13 cents per yard); 100 centimeters (39.37 inches) wide, 1.35 francs per meter (23.77 cents per yard); 110 centimeters (43.3 inches) wide, 1.50 francs per meter (26.42 cents per yard); 120 centimeters (47.24 inches) wide, 1.70 francs per meter (29.94 cents per yard).

Sample 25.—Fancy sateen ticking; imported from Austria-Hungary; 48 inches wide; retail price, 2.40 francs per meter (42.35 cents per yard).

SERVIA.

Sample 1.—T cloth; from England; 72 by 56 picks; 48 yards per piece; prices f. o. b. Liverpool: 25 inches wide, \$2.21 per piece; 30 inches wide, \$2.45; 33 inches wide, \$2.88.

Sample 2.—T cloth; from England; 72 by 72 picks; 48 yards per piece; prices per piece f. o. b. Liverpool: 34 inches wide, \$3.04; 38 inches wide, \$3.32; also made in 25 and 30 inch widths; this is the most common sheeting on the market.

Sample 3.—T cloth; from England; 56 by 48 picks; 20 yards in 24 folds per piece; prices per piece f. o. b. Liverpool: 20 inches wide, 55 cents; 24 inches wide, 68 cents; also made 22, 26, 28, and 30 inches wide.

Sample 4.—Sheeting; from England; 52 by 40 picks; 20 yards per piece; prices per piece f. o. b. Liverpool: 20 inches wide, 51 cents plus 6 per cent; 24 inches wide, 60 cents plus 6 per cent.

Sample 5.—Madapollam; from England; 40 yards per piece; long fold; 30 inches wide; price f. o. b. Liverpool, 7 cents per yard.

Sample 6.—Madapollam; from England; 30 meters (32.8 yards) per piece; book fold; 90 centimeters (35.43 inches) wide; price per piece f. o. b. Liverpool, \$2.52.

Sample 7.—Bleached shirting; from England; 30 meters (32.8 yards) per piece; 30 inches wide; price per piece f. o. b. Liverpool, \$1.28.

Sample 8.—Dowlah; imported from Italy; length of piece, 30 to 40 meters (32.8 to 43.7 yards); furnished in widths of 150, 155, 160, 180, 200, 220 centimeters; most popular width is 150 centimeters (59 inches) and is sold by Italian manufacturers at 90 centimes per meter (15.87 cents per yard) c. i. f. Belgrade.

Sample 9.—Print; imported from England; put up in pieces of 30 to 40 yards or meters; price c. i. f. Belgrade, 30 centimes per meter (5.29 cents per yard).

Sample 10.—Print; from England; 40 yards per piece; price, 4.75 cents per yard f. o. b. Liverpool.

Sample 11.—Print; from Germany; price, 5.8 cents per meter (5.29 cents per yard) c. i. f. Belgrade.

Sample 12.—Print; from Switzerland; 80 centimeters (32 inches) wide; price, 7.72 cents per meter (7.05 cents per yard).

Sample 13.—Print; from England; price, 5.74 cents per yard f. o. b. Liverpool.

Sample 14.—Print; from Spain; price, 5.01 cents per meter (4.58 cents per yard) c. i. f. Trieste.

Sample 15.—Print; from the Netherlands; price, 8.29 cents per meter (7.58 cents per yard) c. i. f. Belgrade.

Sample 16.—Print; from the Netherlands; price, 6.17 cents per meter (5.64 cents per yard) c. i. f. Belgrade.

Sample 17.—Print; from England; price f. o. b. Liverpool, 4.37 cents per yard plus 6 per cent.

Sample 18.—Print; from Germany; price, 6.94 cents per meter (6.35 cents per yard) c. i. f. Belgrade.

Sample 19.—Print; from England; price per yard f. o. b. Liverpool, 6.5 cents plus 6 per cent.

Sample 20.—Oxford; from Germany; price 9.04 cents per meter (8.27 cents per yard) c. i. f. Belgrade.

Sample 21.—Oxford; from England; price, 6.36 cents per meter (5.82 cents per yard) c. i. f. Belgrade.

Sample 22.—Flannel; imported from Germany; this is the most popular quality sold here; it is put up in 30-meter (32.8-yard) pieces and is usually 30 or 27 inches wide; price, 13.51 cents per meter (12.34 cents per yard) c. i. f. Belgrade.

Pattern sheets showing the most popular designs of prints used in Servia.

Pattern sheet showing the most popular designs of flannels used in Servia.



