in 1903-1904, alleged by the Inland Revenue Commissioners to be due to the disappearance of the small brewer. The practice of private brewing exhibits a still greater decline—from 272 to 84 in the years named. Notwithstanding the enormous turnover and output and the large capital invested, neither distilling nor brewing gives employment to many hands, the figures for 1901 being 1330 maltsters, 2052 brewers and 1970 distillers.

*(f) Miscellaneous.—*Paper, stationery and printing are in­dustries in which Scotland has always occupied a foremost position. A paper mill was erected in 1675 at Dalry on the Water of Leith in which French operatives were employed to give

instruction, with the result, in the words of the proprietors, that “ grey and blue paper was produced much finer than ever was done before in the kingdom.” Midlothian has never lost the lead then secured. The paper mills at Penicuik and elsewhere in the vale of the Esk and around Edinburgh are flourishing concerns, and the industry is also vigorously conducted near Aberdeen. Stationery is largely manufactured at Glasgow, Aberdeen and Edinburgh. In 1901 the number of persons employed in the paper and stationery industries amounted to 19,602. Ever since it was established by

Andrew Myllar and Walter Chepman, early in the 16th century, the Edinburgh press has been renowned for the beauty and excellence of its typography, a large proportion of the books issued by London publishers emanating from the printing works of the Scottish capital.

Printing is also extensively carried on in Glasgow and Aberdeen, and Cupar once enjoyed considerable repute for its press. The number of persons engaged in the production of books and other

printed matter (including lithographers, copper, steel plate and “ process ” printers, bookbinders, publishers, booksellers and distributors) amounted in 1901 to 24,139. The first sugar refinery was erected in 1765 at Greenock, which, despite periodical vicissitudes, has remained the principal seat of the industry, which is also carried on at Leith, Glasgow and Dundee. The making of preserves and confectionery flourishes in Dundee, Aberdeen, Paisley and Edinburgh. Kirkcaldy is the seat of the oil floor-cloth and linoleum industries, the latter introduced in 1877. The headquarters of the chemicals manufacture are situated in Glasgow and the vicinity, while explosives are chiefly manufactured at Stevenston and elsewhere in Ayrshire, and at certain places on the Argyll coast. Among occupations providing employment for large numbers were trades in connexion with building and works of construction (136,639 persons in 1901), and furniture and timber (39,000), while the conveyance of passengers, parcels and messages employed 163,102 (railway, 43,037; roads, 53,813; sea, rivers and canals, 20,451; docks, harbours and lighthouses, 10,659; and storage, porterage and messages, 35,142).

*Commerce and Shipping.—*That Scotland had a considerable trade with foreign countries at a very early period may be inferred from the importation of rich dresses by Malcolm III. (d. 1093), and the enjoyment of Oriental luxuries by Alexander I. (d. 1124). His successor, David I., receives the special praise of Fordun for enriching “ the ports of his kingdom with foreign merchandise.” In the 13th century the Scots had acquired a considerable celebrity in shipbuilding; and a powerful French baron had a ship specially built at Inverness in 1249 to convey him and his vassals to the Holy Land. The principal shipowners at this period were the clergy, who embarked the wealth of their religious houses in commercial enterprises. Definite statements

regarding the number and tonnage of shipping are, however, lacking till the 18th century. From two reports printed by the Scottish Burgh Record Society in 1881, it appears that the number of vessels belonging to the principal ports—Leith, Dundee, Glasgow, Kirkcaldy and Montrose—in 1656 was 58, the tonnage being 3140, and that by 1692 they had increased to 97 of 5905 tons. These figures only represent a portion of the total shipping of the kingdom. At the time of the Union in 1707 the number of vessels was 215 of 14,485 tons.

Table XIV. gives the figures of the registered tonnage in port in 1850 and later specified years, which are interesting as showing how,

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| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Table XIV.—*Showing Registered Tonnage in Port in Specified Years.* | | | | | | | | | | | | |
|  | 1850. | | 1860. | | 1870. | | 1884. | | 1900. | | 1905· | |
| No. | Tons. | No. | Tons. | No. | Tons. | No. | Tons. | No. | Tons. | No. | Tons. |
| Sailing vessels | 3432 | 491,395 | 3172 | 552,212 | 2715 | 727,942 | 2065 | 827.295 | 1104 | 709,430 | 918 | 578,340 |
| Steam vessels . | 169 | 30,827 | 314 | 7L579 | 582 | 209,142 | 1403 | 866,780 | 1980 | 1,528,032 | 2330 | 3,139,558 |
| Total . | 3601 | 522,222 | 3486 | 623,791 | 3297 | 937.084 | 3468 | 1,694,075 | 3084 | 2,237,462 | 3248 | 3,717,898 |

while sailing vessels declined during the half century to one-third of their number in 1850, steam vessels increased thirteenfold. It is true that the tonnage of the 918 sailing vessels of 1905 was con- siderably in excess of that of the 3432 sailing vessels of 1850, but even so it was a declining figure from a higher tonnage of the middle of the period. On the other hand, during fifty-five years the tonnage of steamers had grown to be a hundred times as large as it was in 1850. Table XV. illustrates the development that took place in the shipping trade with foreign countries and British possessions, as well as the expansion of the coasting trade, in 1855-1905, certain years being taken as types.

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| --- | --- | --- | --- | --- | --- | --- |
| Table XV.—*Foreign and Colonial and Coastwise Trade: Tonnage of Vessels.* | | | | | | |
| Year. | Coastwise. | | Colonial and Foreign. | | Total. | |
| Entered. | Cleared. | Entered. | Cleared. | Entered. | Cleared. |
| 1855 | 1,963,552 | 2,057,936 | 668,078 | 840,150 | 2,631,630 | 2,898,086 |
| 1880 | 6,628,853 | 5,691,136 | 2,700,915 | 3,001,897 | 9,329,768 | 8,693.033 |
| 1889 | 7,188,763 | 6,998,516 | 3,931,010 | 4,412,607  6,296,555 | 11,119,773 14,767,160 | 11,411,123 |
| 1898 | 9,256,233 | 8,937,481 | 5,510,927 | 15,234,036 |
| 1900 | 7,213,574 | 6,791,959 | 5,657,200 | 6,602,545 | 12,870,774 | 13,394,504 |
| 1905 | 9,928,674 | 9,500,160 | 6,268,745 | 7.478,579 | 16,197,419 | 16,978,739 |

Table XVI. exhibits the growth of the foreign and colonial trade at specified dates since 1755, showing how it advanced by leaps and bounds during the latter part of the 19th century. Though the value of imports into Scotland is less than one-eleventh of that into England, this does not represent the due proportion of foreign wares used and

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Table XVI.—*Showing Growth of Foreign and Colonial Trade since 1755.* | | | | | |
| Year. | Imports. | Exports. | Year. | Imports. | Exports. |
| 1755 | £  464,411  1,688,337  1,268,520 | *£*  535,576 | 1874 | £  31,012,750 | £  17,912,932 |
| 1790 | 1,235,405 | 1880 | 34.997.652 | 18,243,078 |
| 1795 | 976,791 | 1884 | 30,600,258 | 20,322,355 |
| 1800 | 2,212,790 | 2,340,069 | 1889 | 36,771,016 | 22,310,006 |
| 1815 | 3.447,853 | 6,997,709 | 1898 | 36,224,982 | 23,643,143 |
| 1825 | 4,994,304 | 5,842,296 | 1900 | 38,691,245 | 32,166,561 |
| 1851 | 8,921,108 | 5,016,116 | 1903 | 40,396,280 | 32,301,198 |

consumed in Scotland, for the obvious reason that large quantities of goods are brought into the country by rail, nearly all the tea, for example, consumed in Great Britain being imported into London, while several ports have almost a monopoly of certain other imports. Foreign and colonial merchandise transhipped was valued at £989,289 in 1889 and at £746,246 in 1903. The customs revenue rose from £1,965,080 in 1894 to £3,399,141 in 1903. Judged by the combined value of their imports and exports the chief ports arc as shown in the first section of Table XVII. Their status is modified by the movements of shipping, and for purposes of comparison the entrance and clearance tonnage of the trade with British colonies and foreign countries and of the coastwise traffic are exhibited in the second and third sections of the same table. The favourable position occupied by Greenock in the third section is due to its preponderating share of the traffic with the west coast and the islands. Its share of the Irish and coasting trade likewise accounts for the position of Ardrossan in the same section. It should be added that on the figures of import and export value in 1909, Aberdeen had changed places with Methil, and Burntisland with Granton. The figure for Glasgow in that year was £41,238,867.