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**Two Forms of Imperialisms and Asia's Economic Order:  
English and Japanese Maritime Competition in the  
Shanghai-centered International Sea Area in the Early 1930's**

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**I. Introduction**

China had limited participation in oversea navigation up till the mid 1930's, and China's navigation market to expand itself from Asia to the world still relied heavily on the contribution of international marine capitals. The United Kingdom topped the tonnage of ships entering and departing Chinese harbors from 1930 to 1936, while Japan resided as the second. However, with influences from the Manchuria Incident in 1931 and the Japanese Bombing of Shanghai in 1932, Japan's total shipping of entrances and clearances at Chinese harbors suddenly dropped from 40,000,000 tons to 20,000,000 tons, with 28% from 1928 to 1931 plunging into 15% in 1935 for the total freight tonnage entering and departing the Chinese harbors. At the same period, the average tonnage for English merchant ships were maintained around 55,000,000 tons, occupying 37% from 1928 to 1931 with sharp uprising to 42% in 1935( Shina Kaiun No Gensei, 1936:197-199). The share of Japanese ships in the China's oversea navigation routes continued to drop, from 39.75 % in 1927, 36.07 % in 1928(Trade Bureau , The Ministry of Foreign Affairs of Japan, 1931:131-132), and dropped to 20.82 % in 1936( Toua Kaiun Kabushiki Kaisha, 1943:22-23). The rate of English ships occupying foreign navigation routes continue to rise, from 26.06 % in 1927, 29.03 % in 1928(Trade Bureau , The Ministry of Foreign Affairs of Japan, 1931:131-132), to 35.72% in 1936(Toua Kaiun Kabushiki Kaisha, 1943:22-23).<sup>1</sup> Regardless of the wax or wane of

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<sup>1</sup> The ebb and wane in the marine commerce can be observed from the foreign and domestic navigation routes of the foreign companies. After the 1930's English had an advantage in occupying the foreign routes in China

Japanese and English ships' share in the China's foreign navigation routes, the total tonnage for all countries' ships navigating foreign routes entering and departing the Chinese harbors in the 1930's steadily grew (Toua Kaiun Kabushiki Kaisha, 1943:22-23). This can explicate that Chinese sea areas, with foreign navigation market led by the English and Japanese merchants, was gradually being integrated into the neighboring Asia-center Pacific Ocean international sea area.

The international navigation was deeply influenced by the Great Economic Depression in 1929. The depression caused sea-borne trade to reduce greatly in 1930 and also decreased the ship-holding supply. Over 10,000,000 tons of ships were forced to lay up from 1931 to 1933 while freightage cost index fell dramatically. The recession in navigation can also be indicated by the percentage of lay-up. The rate exceeded 10% from 1931 to 1935, and reached a peak of 20% in 1932 and 1933. However, the rate of Japanese merchant ships to be laid up from navigation in the same period was maintained at a relatively lower rate, with the highest of 5.2 % in 1933 and the lowest of 0.5 % in 1935, and the rising rate of Japanese merchant ships were continuously growing(Nakagawa, 1985:29-31; Nakagawa, 1980:25). The exceptionally spirited Japanese navigation in the midst of the world navigation's unfortunate downturn did add to the possibility of trading conflicts between Japan and all other countries, which in turn also brought about severe navigation protectionism in many countries. Along with regulations stipulated in many countries to protect the native ships, the international navigation realm had a surge of unfair competitions. At the time, the United Kingdom was ranked as the number one country for marine shipping, and it owned 6,903 merchant ships in 1936 with total of 17,436,207 shipping tons, occupying 26.7 % of the total shipping freight tonnage worldwide. Japan was ranked the third in marine shipping with 2,564 merchant ships in 1936 and a total of 4,495,110 shipping tons, occupying 6.8 % of the total shipping freight tonnage worldwide(Okazaki, 1938:48). The gradual advancement of Japanese merchant ships in maritime

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and so was in the domestic routes. English ships occupied 41.28 % of the Chinese domestic routes in 1936, and in the same year, Japanese ships only occupied 15.53 % of the Chinese domestic routes(Toua Kaiun Kabushiki Kaisha, 1943: 22-23). Moreover, in "The Present Situation of Chinese Shipping Industry" (Shina Kaiun No Gensei, 1936:199), the English and Japanese ships occupying the Chinese domestic routes in 1936 were 40% and 17% respectively. For further reference, please refer to "Recent Chinese Economic Circumstance"(Chousa Shiryou Kyokai, 1935:56-57).

market became a serious threat to the monopolistic United Kingdom, which used to possess tremendous commercial profits and many colonies before the 1930's. This open confrontation between the English and Japanese merchant ships can be seen in the Sino-centered international sea area in Asia.

Part of the impact of the Great Depression on the navigation in China-centered Asia could be seen through the reorganization or shift of the international navigation routes, which was given rise by the agricultural crisis occurred in the early 1930's during the economic Depression. Though the debates on whether there was ever an agricultural crisis were still controversial, one of the perspectives contended that the abundant harvest in the early 1930's caused the great depreciation of agricultural products, which in turn led to the occurrence of The Great Depression (Kindleberger, 1986: ch.4). Such debates on the reason underlying the happening of the great panic were very complicated and were not the center of discussion in this paper. Nevertheless, because of the abundant harvests worldwide in the early 1930's, the Europe, America, Asia and other continents were self-sufficient in various agricultural staples, and this also decreased at a great extent in the freight tonnage across continental international navigation routes, but served as an advantage in promoting the development of regional navigation routes. In response to this circumstance, Japan grabbed the chance to aggrandize its navigation power in the Asian sea area in the period of 1930's economic depression, and thus represented the blossoming of the regional sea imperialism with its specific features. In contrast, the form of cosmopolitan sea imperialism represented by the English shipping power in Asia and the world began to decline. In accommodation with the development of the Great Depression in 1930's was the recession of across continental international navigation routes, and the closely related British shipping business. The rising in the Asian navigating routes , otherwise , reflected the early recovery of Japan from the economic panic (1932). The changes in the productive amount of the international large gross agricultural staples and the change in supply and demand from different regions served as an adventitious historical factor in influencing the direction shift of international navigation routes and also caused a re-organization in the routes. This condition also led to the ebb and wane of the English and Japanese navigation power which was reflected in the vicissitudes of the Shanghai-centered Asian international navigation

routes. According to the statistics in 1929, total commodity value of exports for wheat and cotton ranked the top in the international agricultural staples' export commodity by value. This paper centered the discussion in these two agricultural products to observe the direction shift in the Shanghai-centered Asian international navigation routes, the vicissitudes of the commodity flow in the early 1930's and its meanings for the two Sea Imperialism in Asia

## **II. The change in Marine Market**

The center of world marine market was originally London before the First World War, and New York became the number one marine market center in the 1930's while London ranked the second and Kobe, rising from the East Asian marine market, ranked the third(Onishi, 1939:52; Woodhead, 1969:545).<sup>2</sup>At the time when the world marine market was still centered in London, the important international trade navigation routes included North Atlantic route( Europe and North America), South Atlantic route(Europe and South America), Euro-Asia route(Europe and Far East), and route between Europe and Oceania. After the Europe-centered world commodity capital flows faced a direction turn during the First World War, the importance of the Pacific transverse routes(between the Far East and North America) navigating around the Pacific Ocean, the Pacific Ocean vertical navigation route(between the Far East and Oceania), and the Euro-Asia route gradually increase ( Nippon Yūsen Kaisha, hereafter referred as NYK, Japan Mail Steamship Company Ltd., 1934a:428; Okazaki, 1938:48; Mitubishi Keizai Kenkyuujo, 1935:12). According to the statistics from the end of 1935, for the route from the Far East to North America East Shore, Japan allocated 50 ships in this route with a total of 347,000 tons, far ahead than any other countries; The United States ranked the second in ship allocation, with 12 ships and a total of 113,599 tons. For the route from the Far East to North America West Shore, Japan allocated 18 ships with a total of 173,062 tons, ranking second to United States' 25 ships allocation and a total of 219,105 tons; in this route, The United Kingdom had 7 operating ships and a total of 113,146 tons, ranking the third. In the routes crossing the Pacific Ocean, Japan

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<sup>2</sup> According to 1936's statistics New York had 35,489,210 tons of ships in the harbor, London had 30,868,381 tons, Kobe had 28,986,489 tons, the fifth biggest seaport Osaka had 20632819 tons, and the fifth largest seaport Hamburg had 18,922,431 tons(Oonishi, 1939:52; Woodhead, 1969:545).

allocated 20 ships with a total of 122,065 freight tons ranking the first, and the United Kingdom ranked the second with 17 ships and a total of 90,213 tons. The English had 34 ships with a total of 369,073 freight tons monopolizing routes between Europe and Oceania( Okazaki, 1938:48). For routes between in Europe and Asia, there were a total of 449 ships and 3,548,000 freight tons, in which the English ships stood for 43% and Japanese ships only occupied 6%(Mitubishi Keizai Kenkyuujo, 1935:16).

For the international navigation routes between the Pacific-centered Asia and other continents, Japanese merchant ships were predominate in the routes between Far East and America, Oceania. On the other hand, English merchant ships situated at a relatively higher standing in Europe-related Far East and Oceania routes( Okazaki, 1938:10-14). The same trend was also reflected in the China-centered foreign routes, including changes in routes terminate or depart from China and oversea routes temporarily berthed in China. English merchant shipping also occupied the advantageous position between the China-centered Far East and Europe navigation routes, having 67 ships and 614,020 tons, while the Japanese merchant ships only had 31 ships and a total of 256,048 tons in these routes. Nevertheless, in the routes between Far East and North American routes, Japan led as the first with 45 merchants ships in a total of 341,748 tons while the English had 41 ships in a total of 331,689 tons, slightly fewer than the Japanese. However, The United Kingdom was substantially lagged behind Japan in the Oceania routes; Japan had 9 merchant ships with a total of 57,163 tons while the English only had 7 ships with a total of 38,767 tons (Toua Kaiun Kabushiki Kaisha, 1943:220-221). Though these statistics have not completely shown that the Japanese merchant ships have monopolized the navigating power in the Pacific Ocean, Japan was seen as the bellwether in the Far East-North America routes, which was the core of Pacific Ocean navigation. The international trend in navigation reflected that Japan had took control of the Pacific Ocean navigation market, including the monopoly in the China-centered navigation routes(Toua Kaiun Kabushiki Kaisha, 1943:36).

At the period when the world marine market still centered in London, the main regional markets were the South America market, North America market, East Asia market, India market, Australia market, Mediterranean market, Black sea market, the Baltic Sea market, and the North Sea market. These regional

markets were the chief commodity production and dispatch market for international sea trade( Okazaki, 1938:118).Observing from shipping freight tonnage in 1913, 1920, and 1925, Mid-Mediterranean or East-Mediterranean region had considerable importance in foreign trading for English or foreign merchant ships departing from United Kingdom. However, for merchant ships navigating to United Kingdom, the importance of Western Europe, Northern Europe, and North Atlantic Ocean gradually fell from 1910's to the 1920's, and thus the economic status of Black Sea market, the Baltic and North Sea market, the once important trading regions, declined progressively( Macrosty, 1926:477, 520-521). In the 1930's when New York became the world marine trade center and the status decline of Europe and North America Atlantic Ocean in the deep-sea navigation routes, the ships operating in these sea regions decreased from 104 ships in a total of 940,000 tons in 1933 to 48 ships in a total of 441,000 tons in 1935(Mitubishi Keizai Kenkyuujō, 1935:516). The business activities in the Black Sea, the Baltic and the White Sea market decreased, and the importance of India, Australia and the North Pacific Ocean relatively increased, reaching a high record of 47% of deep-sea freight with 182 ships in about 1600,000 tons(Mitubishi Keizaiken Kyuujō, 1935:516). At the same period, Japanese merchant ships had a higher proportion in these navigation routes.

Besides the previously mentioned Pacific Ocean navigation routes reflected the situation of East Asian market in the neighboring North Pacific region, the Indian and Australian market also exhibited the same development pattern. In the regular Indian liner routes, Japan and the United Kingdom had relatively balanced power in 1929 with 27 Japanese merchant ships in about 149,000 tons and 20 English merchant ships in about 130,000 tons. However, in 1936 Japan had conspicuously higher proportion of ships in these routes with 48 merchant ships in about 295,000 tons. Occupying 73.6% of the total freight tonnage; yet, English ships decreased to 17 in about 105,000 tons, occupying 26.4% of the total freight tonnage (Okazaki, 1938:40-41; Mitsubishi Keizai kenkyuujō, 1935:20). For the Australian liner routes, there were 9 Japanese ships in about 55,000 tons occupying 77.0%, and English had 3 ships in about 16,000 tons occupying 23.0% in 1926(NYK, 1934a:434~435). Nevertheless, Japan had 20 ships in 1936 in about 116,000 tons occupying 83.3% with

significant rise, while English ships decreased to 3 in about 21,000 tons, falling to 16.7% of the total freight tonnage in the area (Okazaki, 1938:40-41; NYK, 1934a:434-435; Sawa, 1942:13). The navigation power that Japan demonstrated in the East Asian market, Indian market, and Australian market clearly indicated that Japanese power was gradually outperforming the traditional English marine power. In addition, the frequent navigating activities of Japan served as a push to the reviving prosperity in the coastal sea areas surrounding the Pacific Ocean.

In fact, the competitions between English and Japanese navigation re-organized the navigation networks in the Asia-centered Pacific Ocean, which meant that the diminution of English navigation market in the Asia-centered coastal seas and the expansion of Japanese power in the Japan-centered international marine markets. The vicissitudes of navigation markets in the Asia coastal seas further be observed in the branch lines of the previously mentioned deep-sea navigation routes, which was the navigation system pertained to local Asian region or other neighboring coasts. In the case of liner routes between China and Japan, Japanese navigation had the absolute advantageous position (Shina Kaiun No Gensei, 1936:217). Japan monopolized the routes between China and Manchuria and the routes directed toward Japan; Japan had 41 merchant ships for the Sino-Japanese routes in a total of 120,000 tons, and the English merchant ships did not have specifically designated navigation routes. Japan had 24 ships for the two-way navigation routes between China and Manchuria with a total of 46,000 tons, about 33% of the total freight tonnage; in contrast, the English only had 9 ships in these routes in a total 20,000 tons occupying only 9% (Toua Kaiun Kabushiki Kaisha, 1943:220-221). Nevertheless, for liner foreign navigation routes except the Sino-Japanese routes, the English merchant ships still overrode the Japanese, even occupied a higher superiority in China's domestic routes (Sawa, 1942:15-20). The English merchant ships still dominated the China-centered routes in the Southeast Asia, India, and Australia with a total of 20 ships and 56,000 tons. Though Japanese ships were active in the sea area between Japan and the Southeast Asia, the Japanese ships did not establish routes between China and the South East Asia (Mitubishi Keizai Kenkyuujo, 1935:20; Toua Kaiun Kabushiki Kaisha, 1943:220-221). The Japanese merchant ships with a great leap forward were increased to occupy 65.6% of the total merchant ships in Asia while the English merchant ships only took up 21.9% (Okazaki, 1938:35). This explicated vicissitudes between the English and Japanese powers, and the power shifts greatly transforms the once English dominated navigation in the

East Asian sea area before the First World War(Sawa, 1942:15-19). With the reviving trend of Japanese power in the Asian international navigation routes of coastal sea areas, the once dominated English merchant ships were gradually weaken power in the Asian international navigation routes. It was the relative prosperity in the Australian and India route that brought the revival of the coastal marine prosperity. This study discovered that Australian route were closely related to the route for shipping wheat to the Far East, and India was the important cotton supply site for the China-centered Asia in the early 1930's. The following sections devoted to the discussion of the impact brought by Australia and India's great harvest in wheat and cotton had on the China-centered Asian navigation routes in the early 1930's.

### **III. The Change in Marine Networks from the Wheat flow**

The change in Asian International marine market reflected the structural change in the international commodity flow. Silk occupied the highest proportion in China's export goods in the early 1930's(He, 1937:28~38). In the 1920's, Japanese raw silk occupied 90% of the total American imported raw silk, yet Chinese silk only occupied 10%. Chinese silk still held the more important position in the smaller French markets. The fierce competition between Chinese and Japanese raw silk's prices was also reflected in the intense competition between the freight prices of China and Japan exporting to Europe and America, which had caused fluctuations in the sea freight prices(Li, 1981:82-88). However, the economic depression in the 1930's generated recession in demand and caused the collapse of silk price; silk no longer had great influences in the marine markets(Osaka Asahi Shinbun, 1930). On the other hand, the main merchandises took important positions for deep-sea navigation transportation were Manchurian specialty soybeans, Australian wheat, and North American timbers, and coastal sea transportations were mainly on Japanese timber or other construction resources during past long period(Mitubishi Keizai Kenkyuujo , 1935:516). In contrast to 1920's inter-continental timber transport leading to uncertainty in international marine markets, wheat's supply and demand in the 1930's undulated unpredictably, having a crucial role in influencing the international marine markets(Nakagawa, 1985:25). These uncertain fluctuations in wheat were because the amount of wheat trading was much greater than silk and lumber, occupying the second

place in the total amount of world agricultural trade, and thus lumbars played a very significant role in the marine market( Kindleberger, 1986:79). In this case, the most influential merchandise for the China-centered Asian marine markets in the 1930's was changed from China and Japan's raw silks to Australian wheat. Analyzing from the perspective of Asian trade circle, the fluctuations in price of certain commodity in marine transport served as an important index for international freight prices. The shift and distribution of the demand market governed the development of international marine markets, and such development determined the direction of the international navigation routes in some extent.

First, multiple important world navigation routes for wheat were in some extent re-organized in the early 1930's. Since the early 1930's great incident of ship lay-up in the international marine markets rekindled the marine market in the Far East as the dumping export of Australian wheat and also induced the wheat shipping demand of China and Japan(Osaka Mainti Shinbun, 1930). This incident was followed by the re-organization of international wheat navigation routes. Originally, the world wheat market was situated in the United Kingdom before the First World War, and most of the wheat freight entering the English ports eventually will be carried to other international markets(Malenbaum, 1953:104).The circumstances changes in the early 1930's when United Kingdom, Germany, France, Italy and other European countries formerly relying on the agricultural imports had abundant harvest in grains and thus suppressed the import of American and Australian wheat to London and other European countries. This further led to the decline in freight demand and the recession in various important wheat navigation routes, such as routes from South America to Europe, North American to Europe, and Australia to Europe(Kobe Shinbun, 1933b). The condition in deep-sea marine markets was greatly deteriorated (Nihon Yusen Kabushikigeisha, 1934:66). On the other hand, after the English abolished gold standard in 1931, the English pounds were depreciated, and the currency of Australian wheat export had a great advantage in exchange rate, offering cheap foreign prices. Since before the depreciation of English pounds, the freight price in transporting Australian wheat to the United Kingdom was 10 shillings more than transporting it to China. Australian wheat had higher cost yet less demand in the Atlantic Ocean

markets; moreover, in comparison, Argentina wheat and Canadian wheat had much cheaper transportation price in the Atlantic Ocean. The Australian wheat transporting to the Atlantic Ocean received less profit with competitions of wheat produced from other countries(He, 1937:892). Under this premise, the Australian exporters had no choices but to turn to Asian markets(He, 1937:892). From 1931 to 1933 Australian wheat export was expanded to cover the Asian market excluding India(Kobe Shinbun, 1930), and had sharp increase exporting to China and Japan(He, 1937:892). Due to the protectionism against Japanese merchant ships in the early 1930's, many navigation routes for rice between Japan and the Southeast Asia were in less frequent use(Osaka Asahi Shinbun, 1932a), but after 1933 many ship freights berthing in the South Sea colonies were once again allocated and freight rate in the place began to improve (Osaka Asahi Shinbun, 1933).

Japanese merchant ships transported cement and coals to Singapore and Manila and then transported Java sugar and rice from Rangoon (Burma), Saigon(Vietnam) and Bangkok(Tailand) to Hong Kong, Singapore, and China in the returning trip, or they also transported Australian wheat to India, Shanghai, and Japan. This navigation route combined the two major merchandise transportations of wheat and rice; the transportation price was about 10 qian(10 cent in the Japanese yen system) and thus the commerce was particularly prosperous(Osaka Mainiti Shinbun, 1931a). The number of English and Japanese merchant ships changed from navigating the Atlantic Ocean to the Pacific Ocean continued to increase, and freights from the Pacific Ocean transferring to Australia and India also surmounted to break the old records.<sup>3</sup> Indian and Australia sea area with former reduction in ship allocation had a rare increase in ships waiting to be allocated merchandizes for transportation(Osaka Asahi Shinbun, 1933; Osaka Mainiti Shinbun, 1931b). Therefore, the wheat navigation routes beside the Asian routes mainly navigating rice freights were increased in merchant ships from Australia to India, China, and Japan.

The re-organization in the world's wheat navigation routes also influenced one of the world's greatest international commerce navigation routes, which is the direction shift of Chinese soybeans' transportation to Europe. This also

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<sup>3</sup> Several literatures indicated the merchant ships had a direction shift toward the Pacific Ocean and to India and Australia (Koube matashin nixtupou, 1931; Osaka Asahi Shinbun, 1933; Oosaka Mmainti Shinbun, 1931b).

caused the rapid growth in Australian wheat navigation routes, making the Asian marine markets more prosperous. Before the 1930's most country's merchant ships always transported China's Northeast soybeans to Europe first then took the Black Sea wheat back to Asia in the returning trip(NYK, 1934b:61). Most Australian wheat was transported to the Far East(He, 1937:892) and therefore, the integration of the navigation routes of Australian wheat and soybeans began in the 1930's. Wheat was originally supplied to the English in priority(Malenbaum, 1953:199-200), but because of the previously mentioned circumstances, the demand from the United Kingdom decreased in the early 1930's; moreover, Australia replaced Canada and American to become the important export country of wheat(Malenbaum, 1953:14) and was the major wheat provider for China and Japan in the period. In 1933, freight charge for soybean routes between Dalian and Europe was 30 schillings for each kilogram, which was a rare high fee since 1929; in response to this higher freightage cost, many European countries allocated merchant ships to the East to share a piece of the big cake, causing a rise in the ships navigating in the Dalian-Europe route(Kobe Shinbun, 1933a). The inexpensive freightage cost for the wheat transport between Australia and Shanghai attracted various merchant ships to delve in; moreover, the wheat routes posed another advantage that it can also be incorporated transporting soybeans to Europe in the returning trip(Kobe Shinbun, 1933a).<sup>4</sup> Moreover, because of the boycott of Japanese merchandises since the Japanese Bombing of Shanghai in 1932, Japanese merchant ships had no choice but to dispatch ships to Europe. Therefore, the loading in the East continued to decrease. The routes from Japan to Qingdao and Tianjin (Northern China) were almost laid up(Houti Shinbun, 1931) and the amount of freight for Japanese ships going to Shanghai fell to 30 and 40% of the heyday's(Osaka Mainti Shinbun, 1931c). The condition still persisted after the signing of armistice in 1933, and in the meantime, the trend of European merchants, leading by the English, dispatching ships to transport goods from Manchuria and the East to the west continued growing(Osaka Asahi Shinbun, 1932a; Houti Shinbun, 1931; Kobe Shinbun, 19331). Such state of change in the European ships seized the once monopolizing Japanese ships in navigating these routes(Osaka Asahi Shinbun, 1932b). According to the estimation in

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<sup>4</sup> Okazaki Yukitoshi called this line as the world's largest commerce navigation route(Okazaki, 1938:143).

1933, among the 1,500,000 tons of soybean freight to Europe, only 20% of the freight were transported by Japanese merchant ships while 80% of the freights were carried by other foreign ships(Manshuu Nixtupou, 1933). To break the vicious cycle, in 1933 Osaka Shōsen Kaisha ( hereafter refered as OSK, Osaka Mercantile Steamship Co. ) , NYK, and other Japanese merchant ships tried to offer cheaper freightage for large merchant ships to win over the lost navigation routes, and this strategy finally won them over the transportation contract for Australian wheat and Manchurian soybean(Manshuu Nixtupou, 1933; Kobe Shinbun, 1931). In the Shanghai-centered world navigation network after 1932, there presented an interesting phenomenon: The European boats navigated the East while Japanese merchant ships intervened the European routes, and the European boats had ascent in power in the East while the Japanese merchant ships were disadvantaged in China.(Osaka Asahi Shinbun, 1932a; Manshu Nixtupou,1933)

The direction shift of wheat – soybean navigation routes transformed the overall arrangement of the China-centered Asian marine markets for the English and the Japanese. The world economic depression in the 1930's had decreased the once frequently used international triangle route or the multilateral Pacific Ocean route, and in contrast, the marine market placed more values on the liner routes between two stops. In the 1930's multilateral trading routes was dominated by English merchant ships (NYK, 1937: 699-702). At first, Japan and China imported timbers from the Pacific coast of North America and imported wheat from Australia. In response to this demand, merchant ships first transported Australian wheat to Japan and China then navigated toward the Pacific coast of North America to carry lumbers to Australia, and transported timbers and wheat back to China and Japan in the returning trip. This triangular or multilateral trading route had been navigated for long in the English navigation world before the First World War(Sturmeay, 1962:334). Many English merchant ships still used this route to enter various seaports in Asia in the 1930's(British Shipping Committee, OSK , 1939:60).Japan began to transport big volume of Australian wheat to the East in the mid 1920's(He, 1937:890), and various Japanese corporations, such as Yamashita Steamer Companies, gave efforts in establishing such international triangular route(Yamashita Shinnihon Kisen Kabushiki Geisha History Committee,

980:420, 445). However into the 1930's, Japanese merchant ships traveled less of the triangular or multilateral navigation routes(Yamashita Shinnihon Kisen Kabushiki Geisha History Committee, 1980: 418), and some of the Japanese steamer companies already abrogated this route(Yamashita Shinnihon Kisen Kabushiki Geisha History Committee, 1980: 416-7 , 420). Japanese steamer companies, such as OSK, Kawazaki Steamer Company, and Yamashita Steamer Companies, swarmed to establish the Australian and Far Eastern navigation route, not only carrying wool to Japan but also transporting wheat(Yamashita Shinnihon Kisen Kabushiki Geisha History Committee, 1980:439, 455). Yamashita steamers and NYK integrated Australian routes into the old South Sea route and Bangkok route(Osaka Shōsen Mitui Senpaku Kabushikigeisha and Nihon Keieishi Kenkyuujo, 1985:216-218:192). The developmental direction of the Japanese merchant ships taking an advantageous position the marine markets reflected the new trend of world marine markets. The major Asian liner routes between two stops attracted much attention from transportation of wheat, and the flow of wheat in navigation served as another prospective in understanding the expansion of Asian marine market.

#### **IV. The Change in Marine Networks from the flow of Cotton**

As to the value of the world agricultural exports, 1929, and percentage is of total, wheat ranked the second is occupied of 6.6% with 825 millions of dollars. The leading world agricultural commodity for export is raw cotton worth of 1,400 millions of dollars with the share of 11.3%.(Taylor, 1943: 10-12) The major line in transporting cotton centering around Asia was originally the navigation route from the production site in the North America to the Far East before the 1930's, but after 1930 the route departing at the cotton production site in India to navigate to China and Japan had a more important stand in the Asia-centered cotton lines. The direction shift in cotton line was originated from the changes occurred in the Asian cotton supply market. The world total cotton output had gradually increased since 1933. America ranked the top in cotton supply and usually provided about half of the demand in the world market.(White, 1940:267; Yokohama Special Bank 1931:6). In response to this development, the largest shipping merchandise in amount was cotton for the route from the American West shore to the Far East from the 1920's to 1930's. During 1922 to 1930, the average cotton tonnage of the English, American, and other countries' merchant ships carrying cotton occupied about 31.3% of the

total freight tonnage in that particular line, which was estimated to weight around 495,000 tons in a yearly basis(Radius,1968:66). As the major supply market of cotton was in the North America, OSK transported North American cotton to Japan using the New York line carried lower weight by comparison, and their carrying tonnage were 4,499 , 7,649 , 5,147 , 12,636 tons respectively from 1926 to 1928. The cotton freight tonnage transporting from the Atlantic Ocean to the Far Eastern market on the Pacific Ocean gradually decreased (Nihon Kaiun Shuukaisho, 1936:202),while the amount of American produced cotton had also gradually decreased in the total world supply of commercial cotton. During the years of 1934 to 1935, 1935 to 1936, and 1936 to 1937, the American cotton production fell from occupying 51% of the total world supply in commercial cotton to 48%, then to 44%(White, 1940:267). At the same time, the India and Egypt gradually increased in their cotton supply in the world commerce (Radius, 1968:66). The core of world cotton supply market shifted from America to the Asia or African regions, and the cotton shipping freight tonnage carried by Japanese merchant ships navigating in the India to Japan route had a dramatic increase from the 724,000 tons from 1925 to 1928 to 675,000 tons from 1929 to 1932, then to 726,000 tons from 1933 to 1936(Osaka Shōsen Mitui Senpaku Kabushikigeisha and Nihon Keieishi Kenkyuujo, 1985). Concluding from 1993 to 1936, the shipping freight tonnage in the India line far exceeded the 44,000tons of American cotton transported to the Far East (Radius, 1968:66). Indian cotton rose up to become the main representative shipping merchandise in the Japan-India line. With the gradual expansion of commercial scale in the Japan-India line, Japanese merchant ships, including the OSK and NYK, taking a convenient advantage, had leaping carrying tonnage in transporting Indian cotton to 78.9%; without this advantage, English merchant ships had obvious disadvantaged stance occupying only 21.9% of the total freight tonnage of Indian cotton ( Osaka Shōsen Mitui Senpaku Kabushikigeisha, 1966:328 , 301 ; 1985, 245:28 ) . Japanese merchant ships transported four times of the Indian cotton carried by the English merchant ships ( Osaka Shōsen Mitui Senpaku Kabushiki Geisha, 1966:328, 301; 1985: 28,245 ) .

Several characteristics of the cotton transporting lines influenced the shift in foreign marine markets of Asia. The Shanghai-centered Asia marine markets were therefore much more concentrated in the coastal sea area than the previous years. For China's commodities of export, major consumer markets in the 1930's were the America and Europe, which imported raw silk. China also provided tung oil as industry's raw materials for America, Europe, and other industrial countries. China also exported soybean to Europe after the Manchuria Incident. On the other hand, China imported merchandises of wheat from Australia and North America, cotton from North American , sugar from India and Japan, and rice from Saigon and Bangkok (He, 1937:34-36). These consumer markets or product sites served as an anchor to observe the changes of China's foreign marine markets. In contrast to the development of China's foreign trade, the export of raw silk descended from ranking top in the total Chinese export amount in 1910's to become the second in 1931 and 1932. The results showed that the consumer market of China's export commodity had smaller degree of influences toward the deep sea navigation. On the other hand, the bigger change lay in China's import. Since the revival of coastal sea, the Asian regional economic condition began to improve, with a sharp increase in the primary goods' export from Southeast Asia and the South Asia. Such dramatic change in the supply market can first be seen in the sudden increase in the Australian wheat export to China and Japan. Chinese and Japanese wheat import from Australia had risen from 7% in the 1930's, ranking the fifth, to the first place occupying 35.4% in 1931 for the total export amount of Australian wheat (He, 1937:892). In 1931, Australian wheat export to China occupied 65% of the total wheat export to China, and Australian wheat stood for 79% of the total export from Australia to China; in 1932, Australian wheat still occupied 66% of the total wheat export to China and increased to 79% of total Australia import in China(He, 1937:890). Besides, the import from India to China had a dramatic change. Since the First World War, the imports of opium and cotton goods were already decreasing, but after 1931, imports of Indian cotton to China also had a conspicuous increase, with a total of 53,000,000 Customs Gold Units, occupying 62% of the import trade between China and India(He, 1937:540). However, from a different perspective, the import of cotton increased and import of cotton cloth to China dramatically reduced (He,

1937:209). Yet, this led to the deepening dependency of the China-centered Asia of the raw materials import from the Southeast and the South Asia(He, 1937:209). This also induced the expansion of freight tonnage in coastal lines' shipping centering on China. Of the cotton transporting in the India line to the Far East, China's higher proportion in the cotton import, which far exceeded the Japanese import amount(Kobe Matashin Nixtupou, 1935:11.6-11.9). This fact can also explained why merchant ships placed great consideration in the part of cotton lines navigating around China.

According to the previously mentioned consumer market and production sites, commodity of lower values and limited weight had an overwhelming proportion among the total foreign trade in China, which can explicate why tramp shipping commodity occupied the majority of the import and export in China. Such characteristics can also be shown by the fact that the cotton line was operated by tramp steamer lines before the 1930's. In reality, the North America-Far Eastern line or the Japan-India line, the two deep sea navigation routes relating to cotton shipping, were the most successful representative lines developed from the tramp steamer lines into the regular liner lines in the early 1930's. In the early 1930's, the cotton carrying in deep sea lines were operated by a combination of tramp steamer lines and regular liners, and the returning route carrying cotton to the Far East, such as North America to the Far East, and India to Japan route were both tramp shipping lines. Since cotton had an abundant harvest in the early 1930's and the continuous increase of the export and marine shipping expanded to the nearby new markets, these factors made the tramp shipping route to become regular liners and also developed new regular routes. The new developed routes included NYK's Middle North America-Calif route extended from the New York line(1934), Yamashita steamer's Persian Gulf route lengthened from the Bombay line(1933), and Mitsui merchant ships' Madras route extended from the Jakarta line(1933)(Kobe Matashin Nixtupou, 1935). On the other hand, OSK navigating in the India route to the Far East in 1935 was 1.5 times of freight tonnage in 1930 (Osaka Shōsen Mitui Senpaku Kabushiki Geisha, 1966:303). Several Japanese corporations and companies, especially the Osaka cotton spinning companies, having the need to cooperate with the Japanese merchant ships companies for shipping paid special attention to the New York line and Indian line navigation to China. In particular, the merchant ship companies navigating the Indian line were their important business partners(Yamashita Shinnihon Kisen Kabushiki Geisha, 1980:423). Therefore, the Japanese spinning industry was especially concern of the newly established lines or increase in ship allocation to Bombay,

and they even gave indirect support to these merchant ship companies(Mituda Yamatobhumio, 1943:80; Kawazaki Kisen Kabushiki Kaisha,1969:357). The rapid establishment of the regular liners was also due to the active increase of the ships allocation in the coastal seas centering on China ( Osaka Shōsen Mitui Senpaku Kabushikigeisha, and Nihon Keieishi Kenkyuujo, 1985: 147 ;324 ) .

After the substantial growth in the Asian navigation routes, English merchant ships' cotton routes were only meant for the purpose to steadily push forward its navigation service. In contrast, different Japanese merchant ships companies were eager to secure a piece in the expansive growth of marine resources in order to attain better profits for the company. Therefore, news about Japanese merchant ships companies competing for power and interests were often heard at the time. There were few marine conference related to important Asian routes and cotton shipping in the 1930's, including Japan Bombay conference and Japan Calcutta Conference ; English and Japanese merchant ships companies were both important members of these conference (British Shipping Committee , OSK, 1939:103-122). As the agreement in all Asian marine conferences, Japanese merchant ships had a higher shipping freight rate than the English merchant ships in Asia, and in reality, Japanese merchant ships did carry more freight tonnage than the English merchant ships, which was the reason why the Japanese merchant ships companies always competed for marine resource allocations. During the 1930's, English merchant ships occupied a relatively higher proportion in the China-centered international routes since the Southeast Asian colonies were most under the power of English merchant ships as mentioned in previous part of this paper. P. and O. steam Navigation Co. navigating the Shanghai-Bombay line, had designated ships to transport cotton to Shanghai when the Indian new cotton went on market each year (Wu, 1930:496). The British companies also rented boats several times to ship wheat to Shanghai(Mituda Yamatobhumio, 1943:80). Therefore, the increase of raw material exported to China from the Southeast Asia and the South Asia was related to the English merchant ship companies' operative management of China's export navigation lines(Sturmeay,

1962:334).<sup>5</sup> English merchant ships often navigated the Asian regional seas through their world navigation routes, such as the P. and O. Steam Navigation Co. navigated Japan and Bombay through the England-Japan navigation route (British Shipping Committee, OSK, 1939:108). On the other hand, the navigation line centering on China was highly valued by the merchant ship companies. The going trip of the Japan-India line often carried Japanese cotton textile products to Shanghai for India and carried cotton and linen sacks in the returning trip, not to Japan but to Shanghai for Japanese “Cotton Spinning in China”. These Japanese merchant ships navigated to Shanghai in the returning round to fulfill these industries’ branches’ demand in cotton. Therefore, the right of the port for calling in Shanghai seaport was the contentious field for every Japanese steamer corporations (Osaka Shōsen Mitui Senpaku Kabushiki Geisha and Nihon Keieishi Kenkyūjo, 1985:216-218). NYK and the Great Japan Spinners’ Association made a pact on exportation to ensure the stability in transporting merchandises; this agreement was made to satisfy the members’ demand of cotton in the Great Japanese Spinners’ Association. However, OSK did not obtain the right of the port for calling in Shanghai, which limited its shipping capacity and also influenced its supply to the Japanese Cotton Company stationed in China. After efforts of endeavoring fighting over the NYK, OSK eventually attained the right of the port for calling in Shanghai for the returning trip in 1935 (Osaka Shōsen Mitui Senpaku Kabushiki Geisha and Nihon Keieishi Kenkyūjo, 1985:216-218). Japanese trading companies hiring merchant ship for transportation and the buyer of the cargos or the producer were in a relationship of symbiosis, and they actively strove for the stable supply of cotton to China. For the first half of 1930 when the cotton demand was mostly from Asia, the English and Japanese merchant ships initiated the new business opportunity in Asian marine markets; nevertheless, Japanese merchant ships did not ease their inside competition in the supply-abundant cotton lines.

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<sup>5</sup> Merchant ship companies sometimes had the right to refuse or open up new routes to transport merchandise. Please refer to S. G. Sturme, *British Shipping and World Competition* (London: University of London, The Athlone Press, 1962), p.334, footnote 2..

## **V. Conclusion**

The English and the Japanese navigation systems in the 1930's belonged to different development types. Japanese navigation was developed along with industry and commerce. Maritime Affairs established close connections with the foreign markets for raw materials and trading, serving as the lifeline connecting foreign navigation routes is the most important ring in the whole Japanese commerce and industry sectors. The rate of Japanese merchant ships participating in the commerce and industry between Japan and other foreign countries was significantly higher. In the case of United Kingdom, the English had always flaunted about "Freedom of Sea," using navigation as just an auxiliary means to the nation's industry development, and their development in navigation was so mature as to actively manage marine affairs for its own being or development. The English merchant ships occupied less than 7% in the English domestic commerce; yet, they had allocated 92% of the merchant ships for serving foreign commerce. In contrast to the Japanese navigation centering on the Japan-centered foreign routes, the development of English foreign navigation targeted to expand power to the routes in the third country, such as navigating the routes in the 1930's China to other foreign routes, not necessarily having direction relations with the development of British domestic industry. Half of the import and export goods in the third country's commerce were carried by English ships and the English merchants won the saying of monopolizing the seven seas(Sawa, 1942:21-23). In conclusion, though the English and the Japanese navigation belonged to the category of sea imperialism, their development with fierce competitions in the marine markets belonged to different development types.

The influence of English navigation practically overrode the navigation of all other countries until the 1930's. In particular, the English efficient ships (the vessel above 4000 tons but with age not over than 25 years) occupied one third of the total efficient ships worldwide, exceeding all other countries, and therefore the significant role that English merchant ships played should be of great importance. The active role that English merchant ships played in the 1930's was the solid proof of their presiding power. In the Great Britain and Ireland, Africa, and the South Asia, the influence of English merchant ships

overtopped other countries, and these navigation routes belonged to self-governed territories or areas having close economic relations with the United Kingdom. Secondly, for navigation routes in Western Europe and West Mediterranean, Middle and South America Pacific Ocean, Middle America Atlantic Ocean, the English navigation ships occupied 60% of the entire routes; for routes in the middle and East Mediterranean and North America Pacific Coast, they took up 20 to 30% of the routes. Even for the less participated routes in the Nordic Ocean, the English merchant ships occupied 35% of the entire freight rate. Though the influence of English merchant ships was relatively attenuated along with fierce competitions with other countries, the United Kingdom still maintained a very important role in many navigation routes(Chen, 1937:70-75). In contrast to the characteristics represented by Japan's emergent regional sea imperialism with active expansion in the Asian sea area in the 1930's, the performance by the Great Britain although in state of downfall still showed the afterglow its development form of cosmopolitan sea imperialism.

The great harvest in the Indian and Australian agricultural staples and grains in the early 1930's acted as a pusher to open up a opportunity to the Japanese navigation to develop further in Asia and also stabilized the position of Japanese regional imperialism. For the industry using cotton as raw materials, China was undergoing the first import substitute industrialization in the first half of the 1930's. China's cotton spinning factories in Shanghai produce rough spun yarn. Shanghai's cotton spinning factories only relied on the leading Japanese cotton spinning factories to manufacture modern spun yarn. We can observe the fact that Shanghai's Japanese cotton spinning factories had better development skills along with many Chinese cotton spinning factories following the Japanese, and this represented the goose flock development pattern with the highly developed Japanese factories leading the trend in the first half of 1930's. Thus formation of this mutual competition and dependence in the commerce and economic development among Asian countries first depended upon the large amount of raw materials' import, which in turn increased the import of Indian cotton to Shanghai but at the same time greatly decreased the import of cotton textile products to Shanghai; this change was to satisfy China the greater needs in raw materials in the process

undergoing the first import substitution industrialization (He, 1937:209). Second, this change also depended on the Japanese merchant ships gaining the right of the port for calling in Shanghai seaport, and the Japanese ships transported excessive proportions of Indian cotton to Shanghai to ensure the needs of cotton raw materials of the Japanese “Cotton Spinning in China” in Shanghai. Japanese navigation, like previously mentioned, was developed with the core consideration for the industrial and commercial development in Japan.

The Changes occurred in the trade pattern in the 1930’s also affected the Japanese and English navigation power in the competition of Asian sea areas. Japanese navigation had a greater competitiveness in 1930’s.<sup>6</sup> According to the report done by the British shipping committee, such Japanese competitiveness was because of four factors: the depreciation in Japanese yen, lower wages for Japanese crew, government protectionism, and Zaibatsu support(British shipping committee, 1939:69). These factors were undeniably served as determining influences in the rise of Japanese power. The improvement of related seaport relative facilities and the reduced seasonal vicissitudes of merchandises increased the average supply possibility. Moreover, during the great economic panic period, various countries upheld protectionism measures and signed bilateral agreement or custom treaty to restrict the import and export of goods from various countries. Merchant ships can only navigate certain lines to make sure the safety delivery of the merchandises. These changes in trading had impacted to a certain degree the free trade navigation of the English to the seven seas.

This paper intended to explicate the harvest in the agricultural staples had a way to incite the changes in the trade navigation pattern. The changes were due to the trade between the neighboring countries in Asia in the early 1930’s was increasing (Cheng, 1948; Cheng trans, 1990:56). Part of the facts reflected in the abundant harvest of wheat and cotton in Australia and India which had excessively increase the export to China or Japan. The proportions of international trading within regions or between two countries were getting higher, and the major commercial liners between the two stops were highly valued. In contrast, the trilateral, multilateral, or world navigation lines were in

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<sup>6</sup> Japan was the world third largest navigation country in the 1930’s, and the first was the English occupying 26.7percent of the world’s ship freights , the second being the America occupying 14.3 percent, and Japan occupied 6.8 percent (Okazaki, 1938:Ch4).

decay. This indicate the truth that the wheat-navigating routes promoted the prosperity of Japanese shipping lines but were not beneficial to the British shipping companies. On the other hand, cotton-navigating routes from tramp shipping lines going into the regular liner lines, therefore, made the Asian regional lines passing through China and navigating toward Japan particularly advantageous in development for Japan's shipping companies. Japanese navigation's rapid progress had close relation with the revival of Asian coastal seas in the 1930's. The gradual decline in the English imperialist state in the 1930s' had an unavoidable downfallen trend, and Japan was in contrast flourishing. The comparison of the success and failure between two countries were not the central point in this paper, and this paper intended to explain certain adventitious factors that may produce a degree of influences to the destiny of two forms of sea imperialist power during the early period of the Great Depression in the 1930's .

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