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GOVERNMENT OF INDIA

TARIFF COMMISSION

REPORT

ON

The Continuance of Protection to the Bicycle Industry

सत्यमेव जयते

BOMBAY 1960

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India, Tariff (———Commission)

Continuance of Protection to the Bicycle Industry 1960

PERSONNEL OF THE COMMISSION

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GOVERNMENT OF INDIA

MINISTRY OF COMMERCE AND INDUSTRY

New Delhi, the 10th December, 1960.

RESOLUTION

Tariffs

No. 7(2)-T.R./60.—The Tariff Commission has submitted its Report on the continuance of protection to the Bicycle Industry on the basis of an inquiry undertaken by it under Sections 11(e) and 13 of the Tariff Commission Act, 1951. Its recommendations are as follows:—

(1) Protection to the bicycle industry should be continued for another period of three years ending 31st December 1963 at the existing rates of duty.

(2) The Iron and Steel Controller in consultation with the Development Wing and the Development Commissioner, Small Scale Industries, should examine the possibility of reducing the delays in the procurement of indigenous steel items required by the bicycle industry.

(3) Government should take into consideration the request of the bicycle industry for increasing the initial validity period of import licences for special steel items for the bicycle industry to one year while formulating import policy in future.

(4) Early steps should be taken for manufacture of plant and machinery and tools required by the bicycle industry.

(5) There is great scope for the extension of the "I.S.I. Certification Marks" scheme to the bicycle component industry so that the prejudice against indigenous producer may be overcome at least in the domestic market.

(6) Indian Standards Institution should look into the complaints of producers of bicycle components that the fees charged by the Institution are excessive.

(7) It is necessary to establish better liaison between the main producers and the component manufacturers, particularly the small scale units.

(8) Manufacturers of bicycles and/or components licensed under the Industries (Development and Regulation) Act should submit to the Commission monthly returns of their production, sales, stocks and prices.

(9) The bicycle industry should collectively or severally undertake research to improve the quality of the bicycle and also to reduce its costs.

2. Government accept recommendation (1) and necessary legislation will be undertaken in due course.

3. Government have taken note of recommendations (2) to (6) and steps will be taken to implement them as far as possible.

4. The attention of bicycle industry is drawn to recommendations (7) to (9).

ORDER

ORDERED that a copy of the Resolution be communicated to all concerned and that it be published in the *Gazette of India.*

S. RANGANATHAN,

Secretary to the Government of India.

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REPORT ON THE CONTINUANCE OF PROTECTION TO THE BICYCLE INDUSTRY

Previous inquiries

1.1. The claim of the bicycle industry to protection has been the subject of four tariff inquiries in the past. The first inquiry was undertaken by the Tariff Board in 1946 and on its recommendation protection was granted to the industry upto 31st March 1949 by the conversion of the then existing revenue duty of 36 per cent *ad valorem* (standard) and 24 per cent *ad valorem* (preferential) into protective duties at the same rates. In 1949, the Board undertook a second inquiry into this industry and recommended continuance of protection for a further period of three years, *i.e.,* upto 31st March 1952 at enhanced rates of protective duty of 70 per cent *ad valorem* (standard) and 60 per cent *ad valorem* (preferential). It also recommended the inclusion of bicycle parts and accessories in the scheme of protection. Government accepted these recommendations. In consultation with us Government extended protection to the industry first upto 31st December 1952 and again year by year upto 31st December 1954. The third inquiry into this industry was undertaken in 1954 and we recommended that protection should be extended upto 31st December 1956 at the reduced rate of duty of 45 per cent *ad valorem* preferential (exclusive of surcharge), the standard rate of duty to be fixed according to the terms of the Indo-U. K. Trade Agreement. While accepting the recommendation regarding period of protection Government considered that the rates of duty recommended by us might be inadequate and fixed the rate of preferential duty at 47½ per cent *ad valorem* or Rs. 60 per cycle, whichever was higher, the standard rate of duty being fixed at 10 per cent more than the preferential rate. Government also decided that the rates of protective duty on components and accessories of bicycles should continue at the existing rates of 70 per cent *ad valorem* (standard) and 60 per cent *ad valorem* (preferential). Protection was continued in consultation with us for another year *i.e.,* upto 31st December 1957.

1.2. The fourth inquiry into the bicycle industry was undertaken in 1957. We recommended continuance of protection to the industry for a further period of three years ending 31st December 1960 at the existing rates of duty. However, before Government announced their decision on this recommendation, the preferential rate of duty on bicycles had been raised by Finance (No. 2) Act, 1957 to 65 per cent *ad valorem* or Rs. 80 per cycle, whichever was higher and that on parts and accessories of bicycles to 65 per cent *ad valorem,* the standard rates of duty being 10 per cent higher in both the cases. Government accepted our recommendation to extend the period of protection upto 31st December 1960 and protection was continued at the enhanced rates introduced by the Finance (No. 2) Act, 1957.

Present inquiry

As protection to the bicycle industry is due to expire on 31st December 1960 the present inquiry was undertaken by us under section 11(e) read with section 13 of the Tariff Commission Act, 1951 which empowers us to

inquire into and report on any further action required in relation to protection granted to an industry with a view to its increase, decrease, modification or abolition according to the circumstances of the case.

Method of inquiry

3.1. Questionnaires were issued to producers and importers and organisations using bicycles in June 1960 and simultaneously a press note was issued inviting those interested in the inquiry to obtain copies of the relevant questionnaires and submit their replies. A separate questionnaire was issued to manufacturers of bicycle components. The Cycle Manufacturers' Association of India representing the large scale sector of the bicycle industry and the United Ludhiana Cycle Manufacturers' Association and the Punjab Cycle Assembler's Union, both representing the small scale sector were requested to submit memoranda on the various problems of the industry. The Development Wing and the Development Commissioner, Small Scale Industries were addressed for information on the progress of the two sectors of the industry respectively. The Iron and Steel Controller, the Indian Standards Institution, the Director General of Supplies and Disposals and the Engineering Export Promotion Council were addressed for information on various points arising out of the inquiry. All the State Governments were invited to express their views regarding the question of continuance of protection to the bicycle industry; in addition, those Governments, in whose States units of the bicycle industry are located, were requested for a memorandum on the industry. Manufacturers of steel tubes were addressed for information on production, supply and prices of tubes required by the bicycle industry. Dealers of bicycles and their associations were requested to give their views on the distribution system of the producers and on the availability and prices of bicycles and components. The Collectors of Customs at the major ports were requested to furnish c.i.f. prices and landed costs of bicycles and components recently imported through their ports. The High Commission of India in the U. K. and the Embassy of India in Japan were also requested to furnish the latest f.o.b. quotations for bicycles and major components. A list of those to whom questionnaires/letters were issued and from whom replies were received is given in Appendix I.

3.2. We visited certain units manufacturing bicycles in the large scale sector and also visited a few units in the small scale sector. The names of the units visited by us and the officers of the Commission together with the dates of visit, are given in Appendix II. The costs of production of bicycles and components at three units, namely, Hind Cycles Ltd., Bombay, T. I. Cycles of India, Madras and Pearl Cycle Industries Private Ltd., New Delhi were examined respectively by Shri P. M. Menon, Cost Accounts Officer, Shri U. R. Padmanabhan, Cost Accounts Officer and Shri A. K. Banerji, Assistant Cost Accounts Officer of the Commission. The selected units represent a cross section of large and medium size as well as old and new units.

3.3. We held a public inquiry into the industry on 26th September 1960 at Bombay. A list of persons who attended the public inquiry is given in Appendix III.

Scope of the inquiry

4.1. The present scheme of protection to the bicycle industry covers complete bicycles and parts and accessories thereof. The Tariff items relating to them are 75(5), 75(6), 75(7), 75(7A) and 75(8). The first mentioned item covers cycles (other than motor cycles) imported in sections or otherwise, but excludes saddles, tyres and tubes and certain accessories. The next three items cover frames, handlebars and roller chains of certain sizes whether imported cut to lengths or in rolls. Item 75(8) covers all other parts and accessories of cycles (other than motor cycles) not otherwise specified. Bicycle tyres and tubes are excluded from the scheme of protection and are liable to a revenue duty. As we did not receive any request for inclusion of any other item within the scope of our inquiry, it was kept as before in 1957.

4.2. At the public inquiry a suggestion was made by one party that racing bicycles which are not at present manufactured in India and juvenile models may be excluded from the scope of protection. We see no reason to exclude those items specifically having regard either to consideration of costs or future development in the industry.

Recommendations of the Commission in its last Report (1957) and the extent to which they have been implemented

5.1. In addition to the main recommendation regarding continuance of protection to the industry, we in our Report (1957) had made certain ancillary recommendations. The recommendations and the extent to which they have been implemented are given below:

5.2. *Recommendation*

"The existing administration of the rules relating to the import and assessment to duty of roller chains of $\frac{1}{2}'' \times 3/16''$ dimensions leave scope for abuse by importers, but a solution involves technical investigation. Such investigation should be made and steps taken to stop the abuse as it impinges on the effectiveness of the protection granted to manufacturers of bicycle chains of standard dimensions."

In accordance with the decision taken after necessary investigation, roller chains of size $\frac{1}{2}'' \times 3/16''$, whether imported cut to length or in rolls are being assessed to the same rates of duty as were applicable to roller chains of $\frac{1}{2}'' \times 1/8''$. Necessary amendment has also been carried out in item 75(7A) of the First Schedule of the Indian Tariff Act, 1934.

5.3. *Recommendation*

"Government may re-examine the present import licensing policy with respect to raw materials and components with a view to removing any undue hardships suffered by producers other than the four large units".

The present import licensing policy of Government makes no distinction between the large and other units borne on the list of the Development Wing. This subject is further dealt with in paragraph 9.

5.4. *Recommendation*

"Certain Components such as rims, spokes, chains, freewheels, etc. should be recognised as suitable for development by independent ancillary units, and fresh licences for the manufacture of such components and accessories should be granted only to independent units which are established specifically for the purpose and not to manufacturers of complete bicycles".

We are informed that a number of licences have been granted to ancillary units (outside the small scale sector) for the manufacture of components like saddles, hubs, rims, freewheels, chains and spokes. The number of licensed ancillary units for the production of these items is four for saddles, three for hubs, five for rims, five for freewheels, ten for chains and eight for spokes. We understand that licences for the manufacture of these components have also been issued to some of the bicycle manufacturers who will primarily use them for their own products.

5.5. *Recommendation*

"Licences for imports of rims should not be granted unless the production of rims by Dunlop Rubber Co., Ltd. and Wheel and Rim Co. of India Ltd. the two ancillary producers on the one hand, and Hind Cycles Ltd. and Nundy and Company Ltd. (who have surplus capacity) on the other, are found to be inadequate to meet the country's needs."

Imports of bicycle rims have been banned since October 1957. The entire requirement of the industry is at present met by indigenous production.

5.6. *Recommendation*

"As Dunlop Rubber Co. Ltd. expands its production of rims it should, as far as possible, allot the additional production equitably among the various cycle manufacturers instead of reserving it exclusively for the units to which it seels rims at present".

We have been informed by Dunlop Rubber Co. Ltd. that it has been giving a greater share of its increased production to the units other than the big four manufacturers. It has further assured us that with the full utilisation of its increased capacity, supply of Dunlop rims to small units will be further increased. We have, however, still complaints that exclusive tie up of Dunlop with certain large scale manufacturers still continues and the latter are virtually able to get for their expanded production, the full requirement of Dunlop rims as original equipment. This matter is further dealt with in paragraph 18.5.

5.7. *Recommendation*

"All manufacturers licensed under the Industries (Development and Regulation) Act, 1951 should be directed to furnish the Commission monthly with figures relating to their production, sales, stocks and prices."

This has been partially implemented as necessary information for complete bicycles is being furnished to us by the bicycle manufacturers registered with the Development Wing under the Industries (Development and Regulation) Act. They are, however, not supplying relevant information about component parts of bicycles. Nor are those firms which are engaged exclusively in the manufacture of components and parts furnishing returns of their production, sales, stocks, prices, etc.

5.8. *Recommendation*

"When the additional capacity is required for the manufacture of bicycles, prior consideration should be given to the desirability of allowing some of the existing units which are at present restricted to single shift working to work double shift."

Two units were given expansion licences and two new units were granted licences before our recommendation was accepted. One new unit at Gauhati was granted a licence subsequently on regional considerations. Some of the units already work more than one shift. We have been informed that no other licence has been issued during the past two years for the manufacture of complete bicycles in the large scale sector as enough capacity has already been established. We have further been assured that our recommendation will be kept in view whenever the position regarding issue of further licences is reviewed.

5.9. *Recommendation*

"The Indian Standards Institution should re-examine the tentative standards which have been laid down and the draft standards under circulation in the light of the complaints by a section of the industry that they contain superfluous details and create practical difficulties for producers."

The Indian Standards Institution has informed us that while revising the standards it is giving due consideration to implement the Commission's recommendation. We understand that the Indian Standards for frames, rims, handle bars, seat pillars, pedal assembly, hub assembly and spokes (plain) and nipples for spokes are under revision and the standard for chains has been revised.

5.10. *Recommendation*

"The Indian Standards Institution should expedite finalisation of the standards relating to bicycles and components."

The Institution has informed us that the work of formulating standards is being done as expeditiously as possible. Besides nine standards which had been published before the last inquiry, eight more standards have now been published.

5.11. *Recommendation*

"All the manufacturers should assist the Indian Standards Institution in the work of finalising standards and avail themselves of the facilities offered by it for certification".

The Indian Standards Institution has informed us that it is getting necessary co-operation from the producers in the formulation of standards. With regard to the latter part of our recommendation the institution has informed us that so far it has received 19 applications for licences to use I. S. I. Certification Mark, but no licence has yet been issued as the units have not been able to fulfil the essential requirements laid down by it. Reluctance to use the Certification Marks persists among large units with foreign collaboration which follow the specifications of their foreign collaborators and regard certification as superfluous while the small producers of bicycles and components regard the fee prescribed by the I. S. I. for Certification Marks as excessive. This matter is dealt with further in paragraph 11.3.

5.12. *Recommendation*

"The leading producers of bicycles in the country should endeavour to find out export markets for their bicycles in the neighbouring countries where products of Indian manufacture enjoy a measure of goodwill."

We are informed by the large producers that they are making their best efforts to export their products and have met with varying degrees of success in the field. The Cycle Manufacturers' Association of India is also making efforts to encourage exports of indigenous bicycles and components and has introduced an 'Export Pool Scheme'. Exports so far still fall below the target set in the Plan and there is plenty of leeway to make.

5.13. *Recommendation*

"The existing two Associations of manufacturers of bicycles should amalgamate as early as possible."

In 1958 the Cycle Manufacturers' Association, Calcutta and the All India Cycle Manufacturers' Association, New Delhi, merged into one Association, namely, Cycle Manufacturers' Association of India with its office at Calcutta.

Progress of the industry

6.1. The bicycle manufacturing industry has made considerable progress during the last decade under protection. For the manufacture of complete bicycles there were only two units in the large scale sector in 1949 which increased to six in 1953 and to seventeen in 1957. At present there are

as many as twenty-one units of which three have installed capacity of 2 lakh bicycles each and one with 1 lakh while the rest are of medium size. Since our last inquiry two units have surrendered their licences for manufacture of complete bicycles, three have been newly licensed and two have been licensed for expansion. A list of those units together with information relating to the year of commencement of production, capacity and production is given in Appendix IV. Of these twenty-one units, eleven are public limited companies, five private limited companies and the remaining five proprietory/partnership concerns. Only three of these units of which two are large ones have entered into technical collaboration with foreign firms. Two large units have from the start managed without such collaboration and tried to be self-sufficient in the matter of components and parts. The State-wise distribution of the units since 1949 is given in the following table: —

	1949	1953	1957	1960
Punjab	..	1	5	5
Delhi	..	..	2	3
U. P.	..	..	4	6
Bihar	1	1	1	1
Bengal	..	2	3	3
Assam	..	..	..	1
Madras	..	1	1	1
Bombay	1	1	1	1
TOTAL	2	6	17	21

Licensed and installed capacity of these units on single shift are 14·15 and 12·96 lakh bicycles respectively per annum. The production has increased from 7·97 lakhs in 1957 to 9·91 lakhs in 1959 and for 1960 the production of first six months indicates that one million mark may be crossed.

6.2. Besides the units in the large scale sector there exist in the small scale sector a large number of units manufacturing bicycles. While the units in the former sector are registered with the Development Wing those in the latter sector are borne on the register of the Development Commissioner, Small Scale Industries. Though the Commissioner is charged with assisting their development his control over their operations is by no means complete, as they are also subject to the control of State Director of Industries. Though detailed surveys of small scale units were conducted by the Development Commissioner in 1956 there is still paucity of information in regard to output and progress. Information regarding the number of small scale units prior to 1957 is not available. In 1957 there were 49 units on the list of the Development Commissioner of which 14 were in production. It is understood that at the beginning of 1960 there were as many as

130 small scale bicycle manufacturing units, most of which were concentrated in Punjab and West Bengal. Details regarding these units are furnished in Appendix V. While the capacity of this sector including manufacture of components is claimed to be nearly half of that of the large scale sector, its employment potential is claimed to be relatively much higher.

6.3. As regards components, besides large scale bicycle manufacturers, some of which have surplus capacity to their own requirements, there are units which manufacture components only in both the large scale and small scale sectors. In 1949 there were a number of small scale units manufacturing bicycle parts and accessories in Calcutta, Delhi, Ludhiana and Jullunder. The number of units in the small scale sector has been on the increase since then. At the time of our last inquiry in 1957, there were 22 ancillary units registered with the Development Wing out of which 18 were in production. The number of small scale units was then reported to be 501 of which 330 were located in Punjab, 35 in PEPSU, 25 in Delhi, 51 in Uttar Pradesh and 60 in other regions. We are informed by the Development Wing that at present there are 39 ancillary units licensed to manufacture components and 23 of them are already in production. As regards units in the small scale sector, the Development Commissioner for Small scale Industries has informed us that in 1958 there were 612 units of which 441 with capital of Rs. 69·8 lakhs were in Northern region, 120 with Rs. 21·88 lakhs capital in Eastern region, 34 with Rs. 14·95 lakhs capital in Southern region and 17 with Rs. 25·78 lakhs capital in Western region.

6.4. *Problems of small scale industry.*—While the small scale sector has grown apace along with the larger units, the problems at present faced by it are mainly in regard to lack of technical know-how, poor testing facilities and difficulty in securing the right type of raw materials. The Development Commissioner, Small Scale Industries has informed us that his organisation through Small Industries Service Institutes and Extension Centres in each State renders technical assistance to the small scale bicycle assemblers and manufacturers of accessories and parts. During our visit to Ludhiana and Delhi we were able to see the progress made in this direction. Besides this, the National Small Industries Corporation has been supplying machinery to small scale manufacturers under hire-purchase programme on easy instalment basis and uses its good offices to persuade large scale units to obtain their requirements of components and parts from the small scale sector. In fact, we understand that most of the larger units obtain certain components by sub-contracts with smaller firms. For example, axles, cones, brake parts, etc. are supplied by small producers. We, however, noticed during our visits to the small scale units that there is a tendency amongst these producers to manufacture too many items at the same time. This does not enable them to give sufficient attention which is required to develop and produce a standard product. It would be better to encourage them in the initial stages to specialise in the production of a few component parts each.

Capacity

7.1.1. In 1946 the aggregate capacity of the two units then in production was 95,000 bicycles a year. In 1953 six large scale units were in production with an aggregate capacity of 3·90 lakhs on single shift. In 1957 seventeen units which were in production had a total installed capacity of 9·54 lakh bicycles a year on single shift though the licensed capacity was 12·63 lakh bicycles a year. The licensed capacity of the twenty-one units now registered with the Development Wing is reported to be 14·15 lakhs whereas the annual installed capacity based on an assessment made by the Development Wing after our last inquiry is 12·96 lakhs per annum on single shift. The approved capacity of the forty-nine small scale units which were on the list of the Development Commissioner in 1957 was 2·19 lakhs whereas the capacity of the 130 units belonging to the approved list at present is reported to be 7·5 lakhs a year.

7.1.2. As regards manufacture of major components, namely, saddles, hubs, rims, chains, spokes and freewheels, the present capacity registered with the Development Wing, both in respect of large scale manufacturers of complete bicycle and the ancillary units, is as follows :—

Components	Bicycle manufacturers		Ancillary mfrs.		Total Capacity (in lakhs)
	No. of units	Capacity (in lakhs)	No. of units	Capacity (in lakhs)	
Saddles (nos.)	2	8·25	3	3·12	11·37
Hubs (nos.)	5	14·10	2	2·31	16·41
Rims (nos.)	1	3·00	4	25·13	28·13
Chains (nos.)	2	8·40	1	2·25	10·65
Spokes (Gross)	4	7·10	5	4·20	11·30
Free wheels (nos.)	3	13·30	..	..	13·30

Additional capacity for the existing units as well as new units for the manufacture of components has also been licensed. The capacity after the completion of expansion is expected to be as follows :—

Components	Bicycle manufacturers		Ancillary manufacturers		Total Capacity (in lakhs)
	No. of units	Capacity (in lakhs)	No. of units	Capacity (in lakhs)	
Saddles (nos.)	4	13·41	4	4·02*	17·43
Hubs (nos.)	6	14·58	3	3·31	17·89
Rims (nos.)	1	3·00	5	27·53	30·53
Chains (nos.)	3	18·60	10	22·94	41·54
Spokes (Gross)	7	8·90	8	6·00	14·90
Freewheels (nos.)	3	13·30	5	23·60	36·90

*For 3 units only.

Figures of unit-wise capacity are given in Statements I and II of Appendix VI.

7.2.1. *Production.*—It will be seen that there has been a progressive increase in the production of bicycles in the country as indicated in the following table :—

Year	Production (in lakhs)
1947	0·43
1953	2·64
1956	6·46
1957	7·97
1958	9·13
1959	9·91
1960 (Jan.-June)	5·10

The production of bicycles in the small scale sector is reported to be as under :—

Year	Production (in lakhs)
1956	0·45
1957	1·11
1958	1·71
1959	1·97

The total production in both the sectors taken together during each of the last four years was 6·91 lakhs in 1956, 9·08 lakhs in 1957, 10·84 lakhs in 1958 and 11·88 lakhs in 1959. Some of the bigger units and a few units producing only components have reported that they are working more than single shift.

7.2.2. The following statement gives the production of major components by bicycle manufacturers and the component manufacturers in the large scale sector :—

(Figures in lakhs)

Year	Saddles (Nos.)	Hubs (Nos.)	Rims (Nos.)	Chains (Nos.)	Spokes (Gross)	Free-wheels (Nos.)
1957	2·35	9·84	22·72	4·52	7·09	1·90
1958	2·62	10·92	26·75	5·05	7·89	5·06
1959	5·56	16·56	29·57	9·56	8·45	6·22
1960 (Jan.-June)	3·41	9·06	16·74	5·74	4·34	3·29

The details of production of each unit is given in Appendix VII. The production of components by the units in the small scale sector is available only in value. It was estimated at Rs. 175 lakhs in 1955, Rs. 294 lakhs in 1956, Rs. 277 lakhs in 1957 and Rs. 316 lakhs in 1958.

8.1. Complete Bicycles.

Domestic demand

8.1.1. In 1957 we estimated the demand for bicycles at 9·5 lakhs and expected it to increase at the rate of 1·5 lakhs a year and reach 14 lakhs in 1960. Our estimates have not been fully realised. In connection with the present inquiry, we have received varying estimates of demand. Development Wing has estimated the current demand at 14 lakh bicycles a year and expect it to increase at the rate of 2·2 lakhs a year and reach 20·6 lakhs in 1963. The Development Council for Bicycles has estimated the demand in 1965-66 at 25 lakhs. We have also received estimates of demand from certain producers and the Cycle Manufacturers' Association of India and the All India Importers' Association. These estimates are given in the following table :—

(Figures in lakhs)

	Current demand 1960	Future demand		
		1961	1962	1963
1. The Cycle Manufacturers' Association of India . . .	11·50	12·50	14·00	15·50
2. Development Wing . . .	14·00	16·20	18·40	20·60
3. H. R. Bhalla & Sons . . .	12·50	12·50 to 13·50	13·50 to 14·00	14·00 to 15·00
4. Atlas Cycle Industries Ltd. . .	13·00	14·50	16·00	17·50
5. Hind Cycles Ltd. . .	11·50	12·50	14·00	15·00
6. Pearl Cycle Industries Ltd. . .	12·00	14·00	16·00	18·00
7. Sen Raleigh Industries of India Ltd.	12·50	13·50	14·50	15·50
8. Hindustan Vehicles Ltd. . .	..	12·00	15·00	20·00
9. The Traders' Chamber of Uttar Pradesh	15·00	17·00	19·00	25·00
10. All India Importers' Association .	15·00	18·00	21·00	24·00

8.1.2. On the basis of production, sales, imports and exports it would appear that the apparent demand for bicycles was 9·53 lakhs

in 1957, 10·83 lakhs in 1958 and 11·73 lakhs in 1959 as is indicated from the following table :—

(Figures in Nos.)

Year	Sales of large manufacturers	Production of small manufacturers	Imports	Exports and re-exports	Total availability (2+3+4−5)
1	2	3	4	5	6
1957 . . .	751,933	110,730	90,180	22	952,821
1958 . . .	905,581	170,679	7,321	293	1,083,288
1959 . . .	982,328	197,452	696	7,185	1,173,291

The above estimates of demand were discussed at the public inquiry. Official witnesses expressed the view that the estimate of the Development Wing was realistic as there was a measure of unsatisfied demand. There has also to be orderly progression of demand if the Third Plan target of 2·5 million bicycles by 1965 is to be reached. It was however represented by some producers that of late they were experiencing accumulation of stocks and that they were not optmistic of any striking increase in demand during the next three years. Evidence of sales shows that there is no starvation of demand for bicycles in the country. The apparent consumption also shows that there is no possibility of the demand figure of 14 lakhs being reached in 1960. Taking all these factors into consideration, it was agreed that it would be reasonable to place the demand for bicycles at 12·5 lakhs in 1960. As regards the future, we have taken due note of the likely growth of industrial townships, development of roads in the rural and urban areas, improvement in the standard of living, etc. and have come to the conclusion that the demand for bicycles in the next three years would rise by 2 lakhs a year. In our view, therefore, the future demand would be 14·5 lakh bicycles in 1961, 16·5 lakhs in 1962 and 18·5 lakhs in 1963.

8.1.3. It will be seen from paragraph 7.1.1. that the capacity already licensed in the organised sector is 14·15 lakh bicycles a year on single shift. The approved capacity in the small scale sector is 7·5 lakhs a year. Thus given adequate raw materials, the organised and the small scale sectors have sufficient capacity to meet the domestic requirements.

8.2. Components of bicycles.

8.2.1. In 1957 we had estimated replacement demand for main components by estimating the number of bicycles on the road in 1960 at 7 million and adopting the average life of those components as assessed by the Sub-Committee of the Development Council for bicycle industry. In connection with the present inquiry, the Development Wing has furnished the following estimates of domestic demand for components in 1962 and 1963 on the same basis assuming the number of bicycles on road after allowing for wastages at 9 million in 1962 and 10 million in 1963 and the average life of the components being the same as adopted by us in our last report. Large producers have also furnished us with their individual estimates of demand for components. This information is summarised in the following statement :—

(in lakhs)

Component	Life in years	Unit	Commission's estimate of demand for replacement at the end of 1960	Probable demand for replacement calculated by Development Wing		Estimates of demand furnished by manufacturers				
				1962	1963	Name of the Company	1960	1961	1962	1963
1	2	3	4	5	6	7	8	9	10	11
Free wheels	5	Number	14	18	20	Sen Raleigh Industries	14	16	18	20
						Atlas Cycles	15	17	19	21
						Hind Cycles	15	..	..	..
						Pearl Cycles	..	..	..	28
Chains	3	Do.	23	30	33	Sen Raleigh Industries	23	27	30	33
						Atlas Cycles	23	26	29	32
						Hind Cycles	25	..	..	..
						Pearl Cycles	..	..	..	46
Spokes	..	Gross	10	..	..	Sen Raleigh Industries	10	12	14	16
						Atlas Cycles	10	11·5	13	14·5
						Hind Cycles	..	..	..	..
						Pearl Cycles	..	..	..	20
Rims	7	Pairs	10	13	15	Sen Raleigh Industries	10	11·5	13	14·5
						Atlas Cycles	10	11·5	13	14·5
						Hind Cycles	10	..	..	..
						Pearl Cycles	..	..	..	20
Hubs	7	Do.	10	13	15	Sen Raleigh Industries	10	11·5	13	14·5
						Atlas Cycles	10	11·5	13	14·5
						Hind Cycles	10	..	..	..
						Pearl Cycles	..	..	..	20

1	2	3	4	5	6	7	8	9	10	11
Pedals	4	Pairs	17.5	22	25	Sen Raleigh Industries	17.5	20	22.5	25
						Atlas Cycles	18	20.5	23	25.5
						Hind Cycles	20	..	..	..
						Pearl Cycles	..	..	..	35
Saddles	3	Number	23	30	34	Sen Raleigh Industries	23	27	31	35
						Atlas Cycles	23	26	29	32
						Hind Cycles	..	..	..	..
						Pearl Cycles	..	..	..	46
Chain Wheel & Cranks	7	Sets	10	..	..	Sen Raleigh Industries	10	11.5	13	14.5
						Atlas Cycles	10	11.5	13	14.5
						Hind Cycles	5	..	..	..
						Pearl Cycles	..	..	..	20.0
Brakes	7	Do.	10	..	..	Sen Raleigh Industries	10	11.5	13	14.5
						Atlas Cycles	10	11.5	13	14.5
Forks	7	Number	10	..	..	Sen Raleigh Industries	10	11.5	13	14.5
						Atlas Cycles	10	11.5	13	14.5
						Hind Cycles	10	..	..	..
Handle bars	7	Do.	10	..	..	Sen Raleigh Industries	10	11.5	13	14.5
						Atlas Cycles	10	11.5	13	14.5
						Hind Cycles	10	..	..	..
Mud-guards	5	Pairs	14	..	..	Sen Raleigh Industries	14	16	18	20
						Hind Cycles	15	..	..	..
B. B. Axle	4	Do.	17.5	23	25					
B. B. Cups	4	Sets	17.5	..	..					
Hub Cones	4	Do.	17.5	..	..					
Hub Cups	4	Do.	17.5	..	..					
Hub Axles	4	Pairs	17.5	..	..					
Head fittings	..	Sets	..	23	25					

8.2.2. It was suggested that the estimate of replacement needs of each class of components in any year should be based on the average life of the component concerned, the number of new bicycles coming on the road in the year in which the component must have emerged as original equipment and the average life of the bicycle. On this basis the requirements of different components for replacement market are estimated as under :—

Sl. No.	Items	Units	Average life in years	Estimated demand in 1963 (in lakhs)
1	Free wheels	Nos.	5	10·64
2	Chains	Nos.	3	22·24
3	Rims	Pairs	7	8·45
4	Hubs	Pairs	7	8·45
5	Saddles	Nos.	3	22·24
6	Pedals	Pairs	4	17·99
7	Chains wheel and cranks	Sets	7	8·45
8	Brakesets	Sets	7	8·45
9	Forks	Nos.	7	8·45
10	Handle Bars	Nos.	7	8·45
11	Mudguards	Pairs	5	10·64
12	B. B. Axles	Pairs	4	17·99
13	B. B. Cups	Sets	4	17·99
14	Hub Cones	Sets	4	17·99
15	Hub Cups	Sets	4	17·99
16	Hub Axles	Pairs	4	17·99

सत्यमेव जयते

Raw materials

9.1. The principal raw materials required by the bicycle industry are steel items, such as tubes, strips, bars wires and sheets. The types of steel, whether imported or indigenous, and the purpose for which they are required by the bicycle industry are given below :—

Description	Use	Whether imported or indigenous
Tubes . . .	Frame, pedal, handle bar, seat pillar, fork column, brake, etc.	Partially imported.
	Seamless for B. B. Shells . . .	Imported.
Strips . . .	Rims, mudguards, chainwheel, B. B. fittings, lugs, fork crown, chain, etc.	Imported (small quantities available indigenously).
Bars		
Hexagonal bright .	nuts and bolts assorted . .	Imported.
Free-cutting bright drawn.	hubs cones, cups, axles etc. . .	
Black . . .	minor accessories . . .	Indigenous.
Wires		
Cold heading .	brake assembly . . .	Imported.
Spring steel . .	brake and seat assembly, free-wheels,etc. . .	
Galvanised . .	Spokes	
Sheets . . .	Carrier, chain cover, bells, etc. .	Indigenous.

It will be seen that tubes, sheets and black bars are available indigenously. The requirements of strips, free cutting bars and wires are largely met by imports. Besides steel items, the other raw materials required are brass for brazing, brass wires for nipples, and copper, nickel and chromium anodes. Brass wires and anodes are imported and brass for brazing is available indigenously. The industry also requires a number of consumable stores including chemicals for polishing, brazing, electroplating and heat treatment. The bulk of these items is imported.

9.2. The most important raw material for bicycles is 'steel tubes'. We understand that indigenous availability of this item has considerably improved since the last inquiry and at present both the major producers, namely, Indian Tube Co. Ltd. and Tube Investments of India Ltd. along with two previous suppliers of tubes, namely, Premier

Automobiles and Godrej & Boyce Co. Pvt. Ltd. are able to meet the bulk of demand for steel tubes by the bicycle industry. One of the bicycle manufacturers has, however, complained about the following technical defects in indigenous steel tubes :—

(i) Excessive ribbed surface;

(ii) Pit marks on the surface;

(iii) Heavy corrosion inside the tubes; and

(iv) Under annealing, resulting in 'orange peeling' of the surface.

While such defects are not eliminated even in imported tubes the representative of the tube manufacturer concerned informed us at the public inquiry that they have already taken note of these defects which were noticed in the initial stages of production and that steps are being taken to remedy them. Such complaints in themselves will not justify import of tubes. The tube manufacturers have also complained that they do not get full quota for imports of cold rolled steel strips and that the quality of indigenous steel strips is not as good as that of the imported ones and that they are not also available in requisite quantity. Manufacturers of rims have also made similar complaints. When the strip mills under the Steel Expansion Scheme go into production according to plan some of the difficulties will disappear.

9.3.1. It has been represented to us by the manufacturers of bicycles that the procedure to get Indian steel continues to be cumbersome and that it takes six to nine months to get a priority certificate and even after getting the certificate considerable difficulty is experienced in obtaining the material from the producers or stockists. While this is the case with large producers, the medium and small scale producers have to pay higher prices in the open market. We suggest that the Iron and Steel Controller in consultation with the Development Wing and the Development Commissioner for Small Scale Industries should examine the possibility of reducing the delays in the procurement of indigenous steel items by the industry.

9.3.2. So far as imported items are concerned, the industry has made similar complaints regarding shortage in supply and procedural delays. We are informed that since April 1960 the licensing policy is being formulated on the basis of annual requirements of the industry computed on consumption in 1957. The industry has, however, suggested that as production has considerably increased after 1957 and is also steadily rising, the annual requirements should be worked out on the basis of current level of production. It was also represented that since the supply position in overseas markets of special steel items like cold rolled steel strips, bars, free-cutting steel, spring steel, etc. has become very difficult and as suppliers insist for shipment an interval of nine months to a year from the date of placing orders, the import licences for these items should be issued with an initial validity period of one year. We suggest that Government should take the request into consideration while formulating import policy in future.

9.4.1. As regards supply of components to the industry, it may be mentioned that four large manufacturers of bicycles, namely, T. I. Cycles, Sen Raleigh, Atlas and Hind Cycles are producing most of the components required for their bicycles and the value of imported and indigenous bought out components ranges from 3½ per cent to 5½ per cent and 6½ per cent to 25 per cent respectively of ex-factory costs. Other manufacturers of bicycles are producing comparatively few components in their own factories and depend for their supply either on ancillary industries or on the surplus available with large scale bicycle manufacturers. Components manufactured by small scale units are, we understand, mostly for the replacement market. At present imports are mostly restricted to free-wheels, chains, B. B. fittings and fork head fittings. For imports by bicycle manufacturers or assemblers, the maximum of imported components per bicycle is restricted to Rs. 5 and in some cases to Rs. 2·5 only. We have been further informed that with the progressive increase in the production of these components, the imports of components would be reduced further and completely stopped by December 1961.

9.4.2. The Cycle Manufacturers' Association has informed us that it is fully seized of the need of the industry to become self-sufficient and for cutting down imports. But it feels that the manufacture of components has not yet kept pace with this objective as only recently the major units were licensed for extra capacity for producing components. For 1959 the pack value of small scale sector was brought from 24 to 12 rupees. Medium and large scale units by supplying parts and pooling resources have in the interim been helping small scale units to keep up their production despite the cut in imports. They have also helped the development of ancillary industries. Their main hurdle which has a cumulative effect on the cost of the product is lack of adequate quantity and proper grade of raw materials. The Association expects that the proper development of the ancillary industries would take another two to three years and has requested that till then the present arrangements for import of parts upto the present pack value should not be disturbed. We feel that there is some force in the contention of the Association and that while taking any steps to reduce the pack value further, due regard would be given to the increased targets of production.

9.5. One of the complaints was that indigenous components or semi-finished parts were more expensive than imported products. It was stated that Indian made tubes cost more by Rs. 2 per bicycle. With utilisation of indigenous steel when it becomes freely available, the price inequality may disappear. We have, however, noticed a tendency, where import facilities are freely available, of decrying indigenous material on the score of inferior quality. This tendency is pronounced particularly among manufacturers with foreign collaboration who seem to think that quality of their products can be maintained only with imported raw materials. This trend needs to be corrected if the objective of self-sufficiency is to be achieved in the near future.

Quality

10.1. In our last Report of 1957 we observed that there was definite improvement in the quality of indigenous bicycles and satisfactory steps had been taken by the manufacturers generally for improving inspection and quality control as well as techniques of production. Complaints then received mainly related to such matters as poor quality of finish and hardening of friction parts. From replies received in connection with the present inquiry it is observed that large scale manufacturers, particularly those with foreign collaboration, have not received any complaints with regard to their products and the complaints received by other manufacturers pertained to wear and tear, and improper adjustments and lack of finish. Manufacturers have stated that these defects are rectified when pointed out. Bicycles produced indigenously are not all of uniform grade or quality and cannot be expected to be so, so long as there are different price ranges to suit customer demand. A certain degree of preference for foreign brand names and makes still persists among consumers. Again rims made by one manufacturer which do not carry his brand name but of another make sell at a lower price in the market.

10.2. Many of the producers in the organised sector have reported that subsequent to our last inquiry they have taken various steps to improve the quality of their products by the introduction of new designs, improvement in manufacturing and finishing processes, usage of improved tools, tightening of inspection and testing procedure, introduction of quality control, employment of trained and experienced technical experts and provision of training facilities to staff. Since the market is becoming quality conscious, greater attention is being paid to the use of tested materials, adoption of modern techniques and improved methods of enamelling and plating as also heat treatment, brazing and tempering. Manufacturers of complete bicycles and components in the small scale sector have yet to take such steps. They are helped in this direction by the agencies under the Development Commissioner for Small Scale Industries. Some of the difficulties about the attainment of quality are caused by the non-availability of raw materials particularly steel items of correct specifications and quality for the manufacture of friction parts like free-wheels and chains and parts requiring toughness and strength. But we are not unaware that the demands on grounds of quality can be overstated.

10.3. As an increasingly large extent of components of bicycles is being produced in the country steps should be taken that proper quality is maintained and an unreasonable preference for articles whose imports are allowed to some extent does not persist.

10.4. One large scale producer of rims for instance has complained that his product despite being identical in quality and specifications and being able to stand the same tests as that of another established manufacturer is being put at a disadvantage because of the brand consciousness. A number of manufacturers of bicycle components particularly in the small sector have also mentioned that the use of foreign brand names on components manufactured by certain concerns puts

them at a disadvantage. In all such cases protection against the products carrying foreign brand names is sought or their production is asked to be restricted. Of course this is a misguided suggestion, as there has to be full freedom of enterprise and an article must find its market solely on its quantity. However, if the bicycle industry is to develop on sound lines and use in a progressively large measure the products of the widely dispersed components manufacturing industry a system of testing and checking products through an independent agency should be evolved so that approved quality may not be handicapped by existence of unjustified brand preference. It is in this sense that there is great scope for the extension of the "ISI Certification Marks" scheme to the bicycle component industry, so that the prejudice against indigenous producer may be overcome at least in the domestic market.

Standards.

11.1. The Indian Standards Institution has informed us that it has so far published the following 17 standards:—

1.	IS: 532: 1954	Bicycle tube valves
2.	IS: 623: 1955	Bicycle frames
3.	IS: 624: 1955	Bicycle rims
4.	IS: 625: 1955	Bicycle handle bars
5.	IS: 626: 1955	Bicycle seat pillars
6.	IS: 627: 1955	Bicycle chains
7.	IS: 628: 1955	Bicycle pedal assembly
8.	IS: 629: 1955	Bicycle hub assembly
9.	IS: 630: 1955	Bicycle spokes (plain) and nipples for spokes
10.	IS: 960: 1958	Bicycle rim tapes and buckles
11.	IS: 1131: 1958	Bicycle bottom bracket assembly components.
12.	IS: 1132: 1958	
13.	IS: 1133: 1958	
14.	IS: 1134: 1958	
15.	IS: 1281: 1958	Bicycle cranks and chain wheels
16.	IS: 1282: 1958	Bicycle cotter pins, washers and nuts
17.	IS: 1283: 1958	Bicycle free wheels

Of the above, the first nine were in existence at the time of the last inquiry in 1957, the others having been published subsequently. A number of these standards is now under revision. The Indian Standards Institution has confirmed that while revising the various standards it has been giving due consideration to the Commission's recommendations which were made in the context of complaints from a section of the industry that superfluous details which create practical difficulties for the producers should be eschewed. In addition, standards for bicycle front forks, steering head assembly, saddles, lamps, rear reflectors, pumps, carriers, six hole spanner and cone spanner and tyre lever are pending or under consideration.

11.2. The two units having foreign collaboration, namely, T. I. Cycles and Sen-Raleigh Industries have stated that they are following standards laid down by their associates or technical collaborators

which in their view in many cases involve higher specifications than the minimum adopted for the Indian standards. All other units are following generally specifications laid down by the I.S.I., if any. A complaint still voiced is that while standards are necessary to achieve by and large interchangeability of components, rigid and detailed dimensional specifications which would stereotype designing were not desirable. In any case it would appear that as manufacturers are represented on the sub-committee of the Institution which evolve standards, practical difficulties of the kind stated above could be avoided.

11.3. No unit has so far availed of the facility of the "Certification Mark" scheme of the I.S.I. in spite of the Commission's recommendations in its last Report. While some applications have been received, the Institution has apparently not issued "Certification Marks" because the applicants did not appear to have proper testing facilities of their own or their samples were not up to specifications. The units with foreign collaboration which have adopted the maker's specifications as well as those which make quality products do not agree that they would be deriving advantage from adopting "Certification Marks" scheme. But particularly in the case of producers of components some of whom have complained about keen competition with indigenous products bearing foreign brand names, the "Certification Marks" scheme should really prove of some advantage. Many of the producers of components have complained that the fees charged by the ISI are excessive. We suggest that the I.S.I. should look into this matter and remove any basis for genuine grievances so that popularity of the "Certification Marks" scheme which may prove of advantage to the small scale sector and the ancillary industry, may be furthered.

Import control policy and imports

12.1. The import licensing policy followed by the Government of India in respect of bicycles and its components since July 1957 is given below:—

(A) *Complete bicycles.*—Import of bicycles has been banned since July 1957.

(B) *Bicycle components.*—

July-September 1957.—No fresh licences were issued but the validity of the licence issued during the previous licensing period was extended by three months without any enhancement or alteration in the value or quantity licensed. Actual users' applications were, however, considered.

October 1957-*March* 1958.—*Ad hoc* licences were issued to established importers for the import of (i) free wheels; (ii) chains; (iii) bottom bracket axles and cups; and (iv) fork head fittings only. Bicycle steel balls of sizes 5 16 inches diameter and below were allowed to be imported upto one per cent of the face value of the quota licences. Actual users' applications from large scale as well as small scale producers, whose schemes had been approved by Government were considered within a per pack value of Rs. 10. Chains of $\frac{1}{2}'' \times 3/16''$ size with a roller diameter of 0.305" whether cut to length sizes or in rolls were

also considered as cycle chains. Pedals, where threaded end (crank side) of the pedal spindle corresponded to the dimensions of I.S.S. No. IS:628:1955, were considered as cycle parts only.

April-September 1958.—The same policy as for the licensing period, October 1957 to March 1958, was continued except that pack value restriction for actual users' applications was not specified.

October 1958-*March* 1959.—Licences were granted to established importers to the extent of $2\frac{1}{2}$ per cent of one half of their imports during any one year subject to a minimum face value of Rs. 250 and were valid for imports of (i) free wheels; (ii) chains; (iii) B.B. axles, B.B. cups and B.B. lock rings; and (iv) fork head fittings. Other provisions of the policy continued to be the same for the previous licensing period.

April-September 1959.—The policy followed during the previous licensing period for established importers was continued. Actual users' applications were considered on an *ad hoc* basis.

October 1959-*March* 1960.—Policy for this period was same for the period April-September 1959 except that the minimum face value of the licence was raised to Rs. 500 in place of Rs. 250 and the provision regarding pedals which was originally made in October 1957-March 1958 was deleted.

April-September 1960.—Policy during this period was the same as during the previous licensing period, with a further proviso that chains of sizes $\frac{1}{2}'' \times 3/16''$ with a roller diameter of 0.304", 0.306" and 0.307" whether cut to length or in rolls were also considered as cycle chains. Licences were issued to actual users on an *ad hoc* basis.

October 1960-*March* 1961.—As the licences to established importers were issued on an annual basis during the previous period, no fresh policy has been announced. Actual users' applications would be considered as in the previous period.

12.2. *Imports.*—The imports of complete bicycles and bicycle components as recorded in the Monthly Statistics of the Foreign Trade of India were as under:—

(a) *Complete bicycles*

Year	Quantity (Nos.)	Value (Rs.)
1957	90,180	98,44,901
1958	7,321	9,43,926
1959	696	1,06,721
1960 (January-March)	258	36,845

(b) *Components*

Year	Chains	Free wheels	Other components	Total of all components
	Value (Rs.)	Value (Rs.)	Value (Rs.)	Value (Rs.)
1957	14,70,193	26,08,742	1,49,19,327	1,89,98,262
1958	11,85,548	14,95,526	69,06,132	95,87,206
1959	18,81,283	17,07,027	37,79,450	73,67,760
1960 (Jan.-March) .	7,35,811	3,81,965	10,53,279	21,71,055

The breakdown of the figures stated above according to important countries of origin is furnished in Appendix VIII.

12.3. It will be observed that due to the restrictive import policy there has been a rapid fall in imports of bicycles and bicycle compopents. But from the statistics of production given earlier it will be evident that expansion of capacity in the industry and output are also keeping pace with a growing demand.

Export promotion and exports

13.1. The Commission in its last Report (1957) had recommended that the leading producers of bicycles in the country should endeavour to find export markets for their bicycles in the neighbouring countries where products of Indian manufacture enjoy a measure of goodwill.

13.2. In this connection individual manufacturers have informed us that apart from making their contribution to the Export Pool of the Cycle Manufacturers' Association of India, many of them have individually taken measures to export bicycles to the Middle East, Africa, South East Asia and other neighbouring countries. Most of the manufacturers have sent their representatives to these countries and are maintaining regular contacts with the importers there. One of the manufacturers, namely, Atlas Cycle Industries, has informed us that it is making arrangements for advertisement of its products in foreign countries. Some of the big component manufacturers have also been able to export their products. Notwithstanding these measures, the target for export during the Second Five Year Plan has not been achieved. This may partly be due to the domestic industry being still in the stage of expansion and dependent on imports not only for certain main components but also a wide range of raw materials. Competition from certain far East and East European countries whose prices were lower

were also retarding factors. In the context of the expansion in the industry and the fact that bicycles of quality are being manufactured in the country we would repeat our recommendation that manufacturers should go all out to secure a market in neighbouring countries.

13.3. *Cycle Export Pool.*—The Cycle Manufacturers' Association of India has with effect from 1st January 1959 created a Cycle Export Pool for assisting its members in finding export outlets for their products. The funds of the pool are raised by contribution from members at the rate of 0.3 per cent of the value of bicycle turnover (past year's production multiplied by average price) in case of bicycle manufacturers and of the value of total sales (past year's sales multiplied by average price) in the case of components and/or accessories manufacturers. The Members of the Pool who export complete bicycles and components and/or accessories get re-imbursed out of the funds of the pool at the rate of 20 per cent of the total value of the internal wholesale selling price of the bicycles exported or the internal total sales value of components in the case of components and/or accessories exported.

13.4. *Government assistance.*—Like all other manufacturers of engineering goods the manufacturers-*cum*-exporters of bicycles are provided the following facilities under Export Promotion Scheme.

(1) Import of raw materials/components and consumable stores to the extent of 75 per cent of the f.o.b. value of the export or twice the c.i.f. value of the imported material content in the export, whichever is lower, subject to a minimum of 20 per cent.

(2) A hundred per cent rebate of customs/excise duty on duty paid materials entering into manufacture of the exported bicycles. (This rebate is given in the form of a flat rate per bicycle for each of the exported brands of bicycles).

(3) Where indigenous steel is used, a replenishment quota of 133 1/3 per cent of the quantity actually used in the exported product, with priority delivery and concessional prices.

Some of the manufacturers have stated that the above facilities will be of great help if the procedure for grant of licence etc. is simplified and delays avoided.

13.5. *Exports.*—Exports of bicycles increased from 19 valued at Rs. 1,888 in 1957 to 7159 valued at Rs. 9,86,957 in 1959. The main countries to which indigenous bicycles have been exported are Burma and Afghanistan. Bicycle components worth Rs. 1·68 lakhs in 1957, Rs. 1.93 lakhs in 1958, Rs. 1.61 lakhs in 1959 and Rs. 0.51 lakh in January-March 1960 were also exported. Statements showing destination-wise exports of bicycles and item-wise exports of components during the years 1957 to January-March 1960 are given in Appendix IX.

14.1. Bicycles are assessed to duty under item No. 75(5) of the First Schedule to the Indian Tariff Act, 1934. Parts and accessories of bicycles are assessed to duty under Item Nos. 75(6), 75(7), 75(7A) and 75(8) of that Schedule.

Existing rates of duty The current rates of protective duty on the articles falling under these items are shown in the following tables:—

Item No.	Name of article	Nature of duty	Standard rate of duty	Preferential rate of duty if the article is the produce or manufacture of			Duration of protective rates of duty
				A British Colony	The United Kingdom	Burma	
1	2	3	4	5	6	7	8
75(5)	Cycles (other than motor cycles) imported in sections or otherwise, but excluding saddles, rubber tyres & tubes & accessories, such as, carriers & stands, bells, lamps, pumps, gear cases, chain guards & tool kits.					10 per cent *ad valorem*	
	(a) of British manufacture.	Protective.	65 per cent *ad valorem* or Rs. 80 per cycle, whichever is higher.	..	..	..	December 31, 1960.
	(b) not of British manufacture.	Protective.	Rate of duty actually charged at the time for such products of the United Kingdom origin plus 10 per cent *ad valorem*.	..	..	..	December 31st, 1960.
75(6)	Frames for cycles (other than motor cycles).					10 per cent *ad valorem*	
	(a) of British manufacture.	Protective.	65 per cent *ad valorem*.	..	..	..	December 31st, 1960.

1	2	3	4	5	6	7	8
	(b) not of British manufacture.	Protective.	75 per cent *ad valorem.*	..	..	..	December, 31st, 1960.
75(7)	Handle-Bars for cycles (other than motor cycles).					10 per cent *ad valorem*	
	(a) of British manufacture.	Protective.	65 per cent *ad valorem.*	..	..	..	December, 31st, 1960.
	(b) not of British manufacture.	Protective.	75 per cent *ad valorem.*	..	..	..	December, 31st, 1960.
75(7A)	Roller chains of sizes 12·7 mm × 3·175 mm and 12·7 mm × 4·7625 mm used as parts and accessories of cycles (other than motor cycles), whether imported cut to length or in rolls—						
	(a) of British manufacture.	Protective.	65 per cent *ad valorem.*	..	..	..	December, 31st, 1960.
	(b) not of British manufacture.	Protective.	75 per cent *ad valorem.*	..	..	..	December, 31st, 1960.
	Provided that such chains capable of being used as parts and accessories of motor cycles or in an industrial system shall be deemed to be dutiable at the appropriate rate specified above.						
75(8)	All other parts and accessories of cycles (other than motor cycles) not otherwises specified (excluding rubber tyres and tubes)—					10 per cent *ad valorem*	
	(a) of British manufacture.	Protective.	65 per cent* *ad valorem.*	..	..	..	December, 31st, 1960.
	(b) not of British manufacture.	Protective.	75 per cent* *ad valorem.*	..	..	..	December, 31st, 1960.

*Plus the excise duty for the time being leviable on like articles if produced or manufactured in India, and where such duty is leviable at different rates, the highest duty.

Estimates of fair ex-works prices of indigenous bicycles and components

15.1. In 1957 the Commission examined the costs of production of 4 units, namely, Hind Cycles, Sen-Raleigh, T.I. Cycles and Atlas Cycles and estimated the costs of production of each. For the present inquiry, our Cost Accounts Officers have examined the costs of three units, namely, Hind Cycles, T.I. Cycles and Pearl Cycles. Of these, Hind Cycles is the oldest and produces the largest number of components within its own factory. T.I. Cycles is one of the units which has got foreign technical collaboration and Pearl Cycles is a medium size unit. The reports of our Cost Accounts Officers have been forwarded to Government as confidential enclosures to this Report. As the costed units expressed a desire that their individual costs should not be divulged, we give only a summary of their costs without disclosing the figures relating to individual manufacturers. The estimated fair ex-works prices of the bicycles (inclusive of tyres and tubes and saddles) produced by the three manufacturers are given below:—

	Unit A	Unit B	Unit C
	Rs.	Rs.	Rs.
1. Raw materials and finished parts (inclusive of tyres and tubes) including excise duty	85·30	65·70	97·82
2. Labour and establishment and indirect labour	11·44	29·58	19·01
3. Other direct charges less recoveries . .	9·16	15·33	10·49
4. Depreciation and other overheads . .	6·07	6·93	5·82
5. Return at 10% on capital employed . .	7·59	5·49	6·42
	119·56	123·03	139·56

We have provided depreciation at normal income-tax rates and return is allowed at 10 per cent on employed capital.

15.2. Our estimates of fair ex-works prices of important components for the future are given below:—

	Fair ex-works price
	Rs.
1. Chain	2·91
2. Free wheel*	4·08 5·62
3. Hubs (per pair)	5·87 5·50 9·35
4. Mudguards (per pair)	3·71 3·89
5. Chain wheel	7·73 6·47
6. Rims (per pair)*	19·00
7. Handle bar with brakes	18·42 14·29 19·52

*Inclusive of excise duty.

16.1. In Appendix X we have given the c.i.f. prices of recent imports of bicycle components furnished to us by the Collectors of Customs and importers. We have not been able to obtain c.i.f. prices of complete bicycles as their imports have been banned. However, we have received f.o.b. quotations for Japanese bicycles through the Indian Embassy, Tokyo. At the public inquiry the units which have foreign collaboration furnished us with c.i.f. prices of Hercules as £ 8 sh. 10 and Raleigh as £ 10 sh. 14 if imported from United Kingdom. F.o.b. quotation for the Japanese bicycle was Rs. 85.92. The above quotations are for bicycles imported with accessories such as saddles, stand, chain guards and carrier. By excluding the costs of accessories which are not included in our estimated fair ex-works prices of indigenous bicycles and adding insurance and freight, the c.i.f. price of a Japanese bicycle would work out to Rs. 78.42. It was the consensus of opinion at the public inquiry that for purposes of determining the quantum of protection, it would be realistic to adopt the c.i.f. price of Japanese bicycles. The following statement shows the comparison of fair ex-works prices of indigenous bicycles with landed cost of the Japanese bicycle without duty and the rates of duty indicated to give protection for the three makes of bicycles for which we have estimated the fair ex-works prices.

Measure of protection

			Rs.
1. C.i.f. price			78·42
2. Clearing charges (1%)			0·78
3. Duty			87·84
4. Landed cost			167·04
5. Landed costex-duty			79·20
6. Fair ex-works price	119·56 (Unit A)	123·03 (Unit B)	139·56 (Unit C)
7. Difference between 6 and 5	40·36	43·83	60·36
8. Difference as percentage of c.i.f. price	51·47	55·89	76·97

16.2. It will be seen from the above statement that the duty indicated in the case of unit 'C' is as high as 76.97 per cent. The other two units also would require rates of duty above 50 per cent.

16.3. In the case of components, we have not been able to get c.i.f. prices of Japanese components on the basis of actual imports. There were a few imports from Czechoslovakia and China, but we do not consider that the c.i.f. prices of those imports are appropriate for determining the quantum of protection. We have, therefore, worked out c.i.f. prices of components on the basis of the f.o.b. quotations received from Japan as in the case of complete bicycles. The following

statement gives the comparison of the fair ex-works prices of selected components with landed costs of similar components of Japanese origin without duty.

(In Rupees)

	Chain	Free wheel	Hubs (Pair)	Mud-guards (Pair)	Chain Wheel	Rims (Pair)	Handle-bar with brakes
1. C.i.f. price .	1·45	2·25	4·60	4·94	5·14	7·13	6·21
2. Clearing charges	0·06	0·06	0·06	0·06	0·06	0·06	0·06
3. Duty 75% .	1·09	3·69	3·45	3·71	3·86	13·35	4·66
4. Landed cost .	2·60	6·00	8·11	8·71	9·06	20·54	10·93
5. Landed cost ex-duty . .	1·51	2·31	4·66	5·00	5·20	7·19	6·27
6. Fair ex-works price . .	2·91	2·08*	5·87	3·71	7·73	11·00*	18·42
		3·62*	5·50	3·89	6·47		14·29
			9·35				19·52
7. Difference between 6 and 5	1·40	—0·23	1·21	—1·29	2·53	3·81	12·15
		1·31	0·84	—1·11	1·27		8·02
			4·69				13·25
8. Difference as percentage of c.i.f.	96·6	—10·2	26·3	—26·1	49·2	53·4	195·6
		58·2	18·3	—22·5	24·7		129·1
			102·0				213·4

*Excluding excise duty.

16.4. Though our comparison of fair ex-works prices of indigenous bicycles and components with landed costs of similar imported ones without duty indicates that both complete bicycles and the components require protection, two of the large manufacturers with foreign technical collaboration and one medium size unit have suggested that there is no need to continue protection to this industry. It would appear that their confidence rests on the assurance that the present import restrictions would be continued indefinitely. Other major units and the small scale producers and their associations have pleaded for the continuance of protection for a further period. Though the bicycle industry has made good progress under protection, it has still to make considerable headway if it has to compete with imports on equal terms. The basic handicap of this industry is that it has to depend on imports for certain essential raw materials like steel. Not only is the cost of imported steel comparatively high to the domestic producer, but he also finds it difficult to get adequate supplies of suitable quality. Secondly, there is need for considerable improvement in quality, particularly in the case of small units. Thirdly, the present structure of the industry might

require gradual re-adjustment to bring down costs. When the bicycle industry was first started in India there was hardly any possibility of obtaining components from outside sources. As a result some of the large scale units produce a much larger number of components themselves than their counterparts elsewhere. This deprives the domestic industry of the benefits of lower costs by the large scale production of components, which foreign manufacturers derive. We have also noticed that there is a genuine apprehension in the minds of the small scale producers that unfair competition may develop between units with foreign collaboration and the rest, once protection is withdrawn. We are of the view that the progress of this industry requires close watch till it is in a position to compete with imports without high rates of protective duty. Having considered all these aspects, we recommend that protection to the industry should be continued for another period of three years ending 31st December 1963 at the existing rates of duty.

Selling prices, sales system and organisation

17.1. Appendix XI gives the selling prices in 1954, 1955, 1956, 1959 and after the levy of the excise duty in 1960 of certain standard models of indigenously produced bicycles.

17.2. Three of the principal producers have their own sole distribution agents under whom there are authorised dealers all over the country. The other large producer has regional selling agents who appoint dealers in their area. Discounts allowed ranged between Rs. 2 to Rs. 5 per cycle on the wholesale prices. There is a wide margin between wholesale dealers' price and retail price but this appears to have been traditional in the industry. Well-known makes with foreign brand names apparently sell at a high retail price because of consumer preference. We have also noticed that there is a comfortable margin between fair ex-works prices and net realisations. Despite rise in cost of raw materials and labour offset only partially by increase in output many units have told us that no price increases were made till recently when the excise duties came to be levied on rims and free-wheels. A number of units in the industry have thereafter revised their price structure in the context of these duties according to the marketability of the product. Some major producers have increased the price of the bicycle by more than the quantum of the duties which amount to Rs. 10 only per bicycle and have justified it as due to increase in their production cost. Smaller producers who are unable to pass on the full extent of the duty to the buyer have complained against the harshness of the levy and appear to have offered inducements to consumers in the shape of components like saddles, chain covers, extra fittings so as to retain their custom.

Other matters

18.1. *Incidence of excise duty.*—By the Finance Act, 1960 excise duty was levied at the rate of Rs. 2 per freewheel and Rs. 4 per rim. However, producers having capacity to produce 1,000 rims or 1,500 free wheels or less in a year are exempt from so much of excise duty as is in excess of rupee one in the case of free wheels and Rs. 2 in the case of rims. The incidence of excise duty on free

wheels and rims on a complete bicycle is Rs. 10. The Associations of small scale producers have represented to us that these excise duties have hit them hard and the demand for their bicycles has been adversely affected. It has also been represented to us that the replacement demand for these items, particularly rims, have been adversely affected. The evidence before us is not sufficient to prove the above contentions.

18.2. *Monthly returns of production of components.*—We have stated in paragraph 5.7 that we are not receiving returns of production, sales, stocks etc. of bicycle components and parts from manufacturers. Periodical returns on these matters are essential for keeping a watch over the progress of the industry. We, therefore, repeat our recommendation that manufacturers of bicycles and/or components licensed under the Industries (Development and Regulation) Act should submit to the Commission monthly returns of their production, sales, stocks and prices.

18.3. *Manufacture of bicycle machinery.*—The sustained development of the bicycle industry depends on machinery, machine tools and other equipments manufactured in the country. The progress in this direction has been slow partially due to the difficulties in obtaining adequate quantities of alloy and tool steels. The internal market for bicycles being vast and with the demand increasing steadily, early steps should be taken for manufacture of the entire plant and machinery and tools required by the bicycle industry. That alone will ensure the sustained growth of this industry.

18.4. *Research.*—At present very little research is being done by indigenous manufacturers either on design or for the improvement of quality. The bicycle being the only cheap mode of transport, it would continue to be the common man's vehicle for a long time in this country. To increase the demand, it is essential to design bicycles suitable for various uses under different road conditions. There is considerable scope for research in this direction and the industry should collectively or severally undertake research to improve the quality of the bicycle and also to reduce its costs. It is also necessary to establish better liaison between the main producers and the component manufacturers, particularly the small scale units who may be able to produce components cheaply for the replacement market if they are given necessary assistance by the large scale units including those with foreign technical collaboration.

18.5. *Wheel & Rim Company Ltd.*—In paragraph 8.6 of our report (1957) we have drawn attention to the representation of the Wheel and Rim Co. against the difficulty in marketing its products due to increased import of rims as well as expanded production of Dunlop rims which commanded a premium in the market. Since then imports have been banned but the company's difficulty has in no way diminished. It claims that the quality of Jubilee rims is in no way inferior to the rims produced by Dunlop Rubber Co. Dunlop rims enjoy certain advantages. It is a well known brand popular in the country for years

while Jubilee rims came to be manufactured only in 1956. Three of the main producers, namely T.I. Cycles, Sen Raleigh and Atlas Cycles use Dunlop rims as original equipment. This considerably influences small producers and consumers to show preference for Dunlop rims. Unless Jubilee rims maintain high standard of quality and lower their prices, it may not be possible for them to overcome the brand preference for original equipment. This is a matter on which Wheel and Rim Co. should itself take initiative. There is another aspect to which the company has drawn our attention. It represented that it is handicapped for want of adequate supplies of steel strips of the right quality. According to the company, indigenous strips are not up to the mark and it does not receive in time licences to import adequate quantities of strips. We suggest that Government should look into the matter and take steps to remove the grievance of the company if it is found to be legitimate.

18.6. It has been stated by associations of small producers that large scale manufacturers are not only unwilling to give technical know-how to help the small producers but even deny them access to their factories to see modern methods of working. It was also mentioned that some manufacturers bring pressure to bear on their dealers to hold shares in their companies. In some cases dealers are also debarred from dealing in other makes or brands of cycles made by medium or small scale producers. Large units need have no apprehension of competition from small producers. We suggest that cause for such grievance, if any, on the part of small manufacturers should be removed.

19. Our conclusions and recommendations are summarised as under :

Summary of conclusions and recommendations

(i) The domestic demand for bicycles in 1960 is estimated at 12.5 lakhs and the future demand at 14·5 lakh bicycles in 1961, 16·5 lakh bicycles in 1962 and 18.5 lakh bicycles in 1963.

[Paragraph 8.1.2.]

(ii) The estimates of requirements of different components of bicycle for replacement market in 1963 are given in paragraph 8.2.2.

[Paragraph 8.2.2.]

(iii) The Iron and Steel Controller in consultation with the Development Wing and the Development Commissioner for Small Scale Industries should examine the possibility of reducing the delays in the procurement of indigenous steel items required by the bicycle industry.

[Paragraph 9.3.1.]

(iv) Government should take into consideration the request of the bicycle industry for increasing the initial validity period of import licences for special steel items for the bicycle industry to one year while formulating import policy in future.

[Paragraph 9.3.2.]

(v) There is great scope for the extension of the "I.S.I. Certification Marks" scheme to the bicycle component industry.

[Paragraph 10.4.]

(vi) Indian Standards Institution should look into the complaints of producers of bicycle components that the fees charged by the Institution are excessive.

[Paragraph 11.3.]

(vii) Protection to the bicycle industry should be continued for another period of three years ending 31st December 1963 at the existing rates of duty.

[Paragraph 16.4.]

(viii) Manufacturers of bicycles and/or components licensed under the Industries (Development and Regulation) Act should submit to the Commission monthly returns of their production, sales, stocks and prices.

[Paragraph 18.2.]

(ix) Early steps should be taken for manufacture of plant and machinery and tools required by the bicycle industry.

[Paragraph 18.3.]

(x) The bicycle industry should collectively or severally undertake research to improve the quality of the bicycle and also to reduce its costs.

[Paragraph 18.4.]

(xi) It is necessary to establish better liaison between the main producers and the component manufacturers, particularly the small scale units.

[Paragraph 18.4.]

Acknowledgements

We wish to thank the producers, importers, consumers and associations who furnished information in connection with the inquiry and whose representatives gave evidence before us.

K. R. P. AIYANGAR,
Chairman.

S. K. MURANJAN,
Member.

J. N. DUTTA,
Member.

R. S. BHATT,
Member.

RAMA VARMA,
Secretary.

BOMBAY,
Dated 2nd November, 1960.

APPENDIX I

(*Vide* Paragraph 3·1)

List of those to whom questionnaires/letters were issued and from whom replies were received.

*Indicates those who have replied.

A. LARGE SCALE PRODUCERS OF BICYCLES.

*1. T. I. Cycles of India, Ambattur, Near Madras.
*2. Sen Raleigh Industries of India Ltd., Lall Bazar, Calcutta-1.
*3. Atlas Cycle Industries Ltd., Sonepat.
*4. Hind Cycles Ltd., 250, Worli, Bombay.
*5. Hindustan Vehicles Ltd., 11, Clive Row, Calcutta.
6. Wearwell Cycle Co. (I) Ltd., 46-M, Connaught Circus, New Delhi.
7. Gopal Metal Works, Industrial Area, Aish Bagh, Lucknow.
*8. India Cycle Mfg. Co. Ltd., 8 & 9, Tiljala Road, Calcutta-17.
*9. H. R. Bhalla & Sons (P) Ltd., Faiz Bazar, Daryaganj, Delhi-7.
*10. Road Master Industries of India Ltd., Rajpura (Punjab).
*11. Pearl Cycle Industries (P) Ltd., 11/3, Asaf Ali Road, New Delhi-1.
*12. Zenith Cycle Industries, 9, Netaji Subhas Marg, Delhi-6.
13. Rampur Engineering Co., Ltd., Rampur.
14. Steelsons (P) Ltd., Govindpuri, Modinagar (U.P.).
15. Metal Goods Mfg. Co. (P) Ltd., Vidyapith Road, Varanasi-2.
16. Popular Cycle Mfg. Co. Ltd., Belanganj, Agra.
17. Prakash Engineering Co., Aish Bagh Road, Lucknow.
*18. Avon Cycles (P) Ltd., Industrial Area, Ludhiana.
*19. Hero Cycle Industries, 698, Industrial Area 'B' Ludhiana.
*20. Indian Malleable Castings Ltd., 4, Lyons Range, Calcutta-1.
*21. Everest Industrial Corporation, Gauhati (Assam).

B. SMALL SCALE PRODUCERS OF BICYCLES.

PUNJAB

1. Amar Industries, Gill Road, Miller Gang, Industrial Area, Ludhiana
2. Bicycle Mfg. Co-operative Societies, Ludhiana.
*3. Deepak Industries, Gill Road, Ludhiana.
*4. Gurunanak Engineering Works,747, Industrial Area 'B' Gill Road, Ludhiana.
5. Malerkotla Cycle Iron and Steel Industrial Co-operative Society, Malerkotla (Punjab).
6. Prabhat Cycle Industries, G.T. Road, Industrial Area, Miller Ganj, Ludhiana.
*7. Anand Rubber & Cycle Industries, Anand Building, Kapurthala.
8. Robust Cycle Industries, Factory Area, Patiala.
9. Sunflower Cycles Private Ltd., Miller Ganj, Ludhiana.
10. Supper Cycle and Allied Industries, Supper House, G. T. Road, Ludhiana.
11. Loomba Cycle Works, 790, Industrial Area, 'B' Ludhiana.

DELHI

12. A. K. Cycle Industries, 84, Chandni Chowk, Delhi.
*13. Birmingham Cycle Industries, P. O. Esplanade Road, Delhi-6.
14. Arjan Singh Dalip Singh, Pul Bangash, Sadar Bazar, Delhi.
15. Armour Cycle Industries, 29, Najafgarh Road, New Delhi.
16. Chandra Industries, Kalkaji, New Delhi.
17. Hindustan Cycle Accessories Mfg. Co., Lawrance Road, (P.O. Power House) Delhi-6.
18. Matchless Cycle Industries, 8-A, Esplanade Road, Delhi.
19. Nawalason Cycle Industries, Moti Nagar, Delhi.
20. New Era Engineering Co., 26, DLF Industrial Area, Najargarh Road, New Delhi.
21. Republic Cycle Industries, 31, Najafgarh Road, DLF Industrial Area, New Delhi.
*22. Road King Cycle Co., 47A, Esplanade Road, Delhi-6.
23. Ruby Cycle Accessories Mfg. Co., 36, DLF Industrial Area, Najafgarh Road New Delhi-15.

MADHYA PRADESH

24. Ashoka Cycle Industries, 28, Industrial Estate, P.O. Birlanager, Gwalior.
25. Ashoka Cycle Industries, Gwalior.
26. Central Cycle Industries, 12, Maharani Road, Indore.
27. Mercury Industries, Mantri-ji-ki-Building, Gwalior.
28. R. B. Cycle Industries, New Road, Ujjain.
29. Roadmaster Cycle Industries, Gwalior.

MAHARASHTRA

30. Cycle Accessories Mfg. Co., 906, Shukrawar Peth, Khadaki, Poona.
*31. Commercial Engineering Works, Ghat Road, Nagpur.
32. Hamilton Industries, Tulsipipe Line Road, Bombay.
33. Precious Die Works, B. P. T. Plot No. 1, Jivaraj Thakarsi Road, Cotton Green, Bombay.
34. The Swaraj Cycle Industries, Reddy Lodge, Clerk Town, Nagpur.

BENGAL

35. Banerjee Cycle Industries, 17, Weston Street, Calcutta-13.
*36. J. J. Mullick & Brothers, 21, Bentinck Street, Calcutta-1.
37. Unique Industries, 37, Musjid Bari Street, Calcutta.

UTTAR PRADESH

38. Bharat Industrial Corporation, 84/7, Factory Area, Kanpur.
39. National Cycle Industries, Model Town, Ghaziabad.
40. The Pioneer Industries, 12-A, Heweth Road, Allahabad.
41. Saibro Engineering Works, Aish Bagh Road, Lucknow.

MADRAS

42. Rapid Industries, Gerugam Bakkam, Kovour Post (Via) Poonamalle, Near Madras.

40. Gurdeep Singh Mehar Singh, G. T. Road, Ludhiana.
41. Gurnam Singh & Brothers, G. T. Road, Millar Ganj, Ludhiana.
42. Gurunam Singh & Sons, Manak Puri, Ludhiana.
43. Guru Arjan Mechanical Works, Gill Road, Millar Ganj, Ludhiana.
44. Guru Nanak Machinery Works, G. T. Road, Millar Ganj, Ludhiana.
45. Guru Nanak Manufacturing Works, Railway Road, Jullunder City.
46. Harbans Electric & Machanical Works (Regd.), Millar Ganj, G. T. Road, Ludhiana.
47. Harbhajan Sing Gurdial Singh, G. T. Road, Ludhiana.
48. Harijan Industrial Corporation, Tanda Road, Jullunder City.
49. Himmat Mechanical Works, Millar Ganj, Ludhiana.
50. H. S. Bansal Engineering Works, 473, Industrial Area 'B', Millar Ganj Ludhiana.
51. Indra Industries, Gill Road, Ludhiana.
52. Indian Mechanical Works, G. T . Road, Ludhiana.
53. Ishar Singh & Sons, Millar Ganj, Ludhiana.
54. Jadhav Mechanical Works, Millar Ganj, Ludhiana.
55. Janata Engineering Co.. G. T. Road, Millar Ganj, Ludhiana.
56. Jandu Cycle Industries, Moongphali Mandi, Ludhiana.
57. Jaswal Brothers, Gill Road, Millar Ganj, Ludhiana.
*58. Jupiter Industries, 688, Industrial Area 'B', Ludhiana.
59. Komal Cycle Industries, Gill Road, Miller Ganj, Ludhiana.
60. Kamal Industries, Millar Ganj, Ludhiana.
61. Karm Singh & Sons, Gill Road, Ludhiana.
62. Kaushal Cycle Industries, G. T. Road, Millar Ganj, Ludhiana.
*63. Khalsa Engineering & Cycle Industries, G. T. Road, Millar Ganj, Ludhiana.
64. Khalsa Welding Works, Gill Road, Ahartta Narain Das, Ludhiana.
65. Kiran Industries, G. T. Road, Millar Ganj, Ludhiana.
66. Kocchar Industries, Moongphali Mandi, Ludhiana.
67. Kuldip Industries, Industrial Area 'B', Ludhiana.
68. Kumar & Kumar, Moongphali Mandi, Ludhiana.
69. Lachman Singh & Sons, G. T. Road, Ludhiana.
70. Lakera Metal Industries, Lakara Bazar, Ludhiana.
71. Lotus Cycles Industries, Industrial Area 'B', Ludhiana.
*72. Laxmi Metal & Cycle Parts Works, Katra Sher Singh, Amritsar.
73. M. S. Steel Works, Munawar Road, Ludhiana.
74. Manjal Industries, G. T. Road, Ludhiana.
75. Manjit Mechanical Works, G. T. Road, Millar Ganj, Ludhiana.
*76. Mansoor Mechanical Works, G. T. Road, Millar Ganj, Ludhiana.
77. Modern Cycle Works, Gill Road, Ahartta Ganesh Mills, Ludhiana.
78. Mohinder Singh Joginder Singh, Gill Road, Miller Ganj, Ludhiana.
*79. Murari Engineering Works, Alsan Road, Civil Lines, Ludhiana.
80. National Metal Industries, Gill Road, Ludhiana.
81. Navyug Bicycle Industries, G. T. Road, Miller Ganj, Ludhiana.
82. Nidhan Engineering Works, Jail Road, Ludhiana.
83. Paramount Cycle Industries, G. T. Road, Millar Ganj, Ludhiana.

84. Paul Industries, G. T. Road, Millar Ganj, Ludhiana.
85. Prince Wall Cycle Industries, Moongphali Mandi, Ludhiana.
86. Pritam Mechanical Works, Millar Ganj, Ludhiana.
87. Public Cycle Works (Regd.), Gill Road, Millar Ganj, Ludhiana.
88. Raj Industries, G. T. Road, Millar Ganj, Ludhiana.
*89. Raja Mechanical Works, Jail Road, Ludhiana.
90. Ranjit Cycle Industries, G. T. Road, Ludhiana.
91. Rajindra Bicycle Industries, Gill Road, Ahartta Narain Dass, Ludhiana.
92. Rana Cycle Industries, Millar Ganj, Ludhiana.
93. S. M. Gandhi & Co., Moongphali Mandi, Ludhiana.
*94. S.P.W. Cycle Industries, 818, Industrial Area 'B', Ludhiana.
95. Saggu Mechanical Works, G. T. Road, Ludhiana.
96. Sailkot Steel Works, Brown Road, Ludhiana.
97. Seth Cycle Industries, New Market, G. T. Road, Ludhiana.
98. Sham Welding Works, G. T. Road, Ludhiana.
99. Shamsher Mechanical Works, Gill Road, Millar Ganj, Ludhiana.
100. Sohan Cycle Industries, Gill Road, Ludhiana.
101. Sond Mechanical Works (Regd.), Vishwakarma Puri, Gill Road, Ludhiana.
102. State Mechanical Works (Regd.), Gill Road, Ludhiana.
103. Tara Singh Bhal Singh & Co. (Regd.), Industrial Area 'B', 626, Ludhiana.
104. Tirat Ram Agarwal, Meh. Ajitpura, Jullunder City.
105. Trilock Mechanical Works, Narankari Street, No. 1, Millar Ganj, Ludhiana.
106. T.S.N.S. Mechanical Works, Gill Road, Ludhiana.
107. Varma Cycle Mfg. Works, Gill Road, Ahatta Ganesh Mills, Ludhiana.
108. Victory Cycle Works, Malerkotla (Punjab).
109. Virdi Brothers, 1380, Noggar Mandi & Industrial Area, Ludhiana.
110. Dhimam Foundry Works, G. T. Road, Phagwara.
*111. Avery Cycle Industries, 10-R, Industrial Area 'B', Ludhiana.
112. The Asian Cycle Industries, 24, Millar Ganj, Ludhiana.

UTTAR PRADESH

113. Bharat Industrial Works, Aish Bagh Road, Lucknow.
114. Bharat Manufacturing Works, 93/112, Anwerganj, Kanpur.
115. Bharat Industrial Corporation, 80/89, La-Tauche Road, Kanpur.
116. Bhailala & Co., C 28/131, Talia Bagh, Banaras.
117. B. Kundu Engineer, 15/89, Civil Lines, Kanpur.
*118. Buddhulal & Co., C 30/4, Naladahia, Varanasi-2.
119. Hind Industries Works, 107, Jawahar Nagar, Kanpur.
120. Janata Parambulator Works, Khiali Ganj, Lucknow.
121. M. R. Talwar & Sons, 788, Latouche Road, Lucknow.
122. Primax Sardar Vyapari, 10, Kunj Behar Palace, Kanpur.
123. Rayat Engineering Works, 38, Hiraganj, Kanpur.
124. Radha Krishnan Misra, 39/79, Chowk, Banaras.
125. R. Dunlop Steel Co., Naval Ashram, Abbot Road, Lucknow.
126. Sardar Vyapari, 10, Kunk Place, Kushalpuri, Kanpur.
127. S. S & Sons, 24, Factory Area, Kanpur.

128. Standard & Co., P. B. No. 249, Kanpur.
129. Swastik Cycle Industries, Belangunj, Agra.
130. The Saibro Engineering Works, Aish Bagh Road, Lucknow.
131. Kumar Industries, Allahabad.
*132. Super Cycle Industries, 91B, Khushalpuri, Nazirabad Road, Kanpur.
133. Cawnpore Tannery Ltd., Kanpur.

DELHI

134. British Parmabulators Co., Kutab Road, Delhi.
135. Hindustan Cycle Accessories Mfg. Co., 12, Fort View Hotel, Esplanade Road, Gandhi Chowk, New Delhi.
136. Imperial Technical Works, Laxmidurga Mills Building, Original Road, New Delhi.
137. Malhotra & Co., Behind Imperial Bank, Chandni Chowk, Delhi.
138. Republic Cycle Industries, 31, Najafgarh Road, Delhi.
139. Vodis Enterpries, Vodis Bhavan, 1593, Delhi Madarsa Road, Kashmere Gate, Delhi.

GUJERAT AND MAHARASHTRA

*140. A.B.C. Engineering Corporation (P) Ltd., City Mills Compound, Kankaria, Ahmedabad.
141. Hamilton Industries, Off Haines Road, Tulsipipe Line Road, Bombay-13.
*142. Indo-Belga Engineering Co., P. C. Gomatipur, Ahmedabad.
*143. New Haven Steel Ball Corporation, Nanjee Building, 2nd Floor, 17-B, Horniman Circle, Bombay.
144. Precious Die Works, B.P.T. Plot No. 26, Jackaria Bunder Road, Bombay-12.
*145. Shah Industries, 8 Ebrahim Mansion, 366/68, Kalbadevi Road, Bombay.
*146. Velo Industries, Mahatma Gandhi Road, Bhavnagar (Saurashtra).

MADRAS

147. National Engineering Works, 107, Surya Narayana Chetty Street, Royapuram, Madras-13.
148. Royal Industries, Rajapalayam, Ramnad District (Madras).
*149. Wheel and Rim Co. of India Ltd., Huzur Gardens, Sembiam, Madras-11.

KERALA

*150. Travancore Rubber Works, Trivandrum-7.

WEST BENGAL

151. Eastern Iron and Steel Corporation, Netaji Subhas Road, Calcutta.
*152. Indian Union Manufacturers (P) Ltd., 190, Rash Behari Avenue, Calcutta-29.
*153. Kashi Cycle & Rikshaw Co., P-25, Princep Street, Calcutta-13.
*154. Republic Engineering Corporation Ltd., 7, Chowringhee Road, Calcutta-13.
*155. Senco Engineering Works & Co., Private Ltd., 55/2, Sastitla Road, Calcutta-11.
*156. The Dunlop Rubber Co. (India) Ltd., 57-B, Free School Street, Calcutta-16.
157. Nundy & Co., Calcutta.
158. Unique Industries, 37, Masjid Bari Street, Calcutta-6.

MYSORE

159. Krishna Tools Engineering Works, Tank Road, Bangalore.

ANDHRA

160. New Viya Bharat Industries, Opp: Lady Hospital, Rajahmundri.
161. Sri Krishna Cycle Industries Works, Ambajipesta, East Godavari District, (Andhra Pradesh).
*162. Weldone Cycle Company, B 10/595-596, Sayeed Jung Lane, Troop Bazar, Hyderabad (A. P.).
163. Abdul Khadar Cycle Stand Co., Rahimpura, Hyderabad.

RAJASTHAN

164. National Bearing Co. Ltd., Jaipur.

D. PRODUCERS' ASSOCIATIONS

*1. United Ludhiana Cycle Manufacturers Association, Miller Ganj, Gill Road, Ludhiana.
*2. Punjab Cycle Assemblers Union, Gill Road, Ludhiana.
*3. Cycle Manufacturers' Association of India, India Exchange, India Exchange Place, Calcutta.
*4. Northern India Cycle Parts Manufacturers Association, Jullunder City.
*5. The U. P. Cycle Manufacturers Co-operative Association Ltd., 76/18, Factory Area, Kanpur.

E. DEALERS' ASSOCIATIONS

*1. The Ahmedabad Cycle Merchants' Association, Inside Panch Kuva, Ahmedabad-1.
*2. The Traders' Chamber of Uttar Pradesh, Meston Road, Kanpur.
*3. The India Cycle Traders' Association, 5, Bentinck Street, Calcutta.

F. TUBE MANUFACTURERS

*1. Premier Automobiles Ltd., Agra Road, Kurla., Bombay.
2. Indian Tube Co. (1953) Ltd., Tatanagar.
*3. Tube Products of India, Avadi, Near Madras.
*4. Godrej and Boyce Mfg. Co. Ltd., Lalbaug, Bombay.

G. DEALERS

1. Midlands (P) Ltd., Meston Road, Kanpur.
2. L. C. Chopra & Sons, 111, Sadar Bazar, Lucknow.
*3. Shankarlal & Sons (P) Ltd., 50-A, Taj Road, Agra.
4. Mehta Cycle & Motor Co., Kaisarganj, Ajmer.
5. Northern India Cycle Agency (1934), Diwan Hall Road, Delhi.
6. Punjab Cycle Store, Sector 19-C, Chandigarh.
7. Howrah Cycle Supply Co., 212, Strand Road, Calcutta.
8. Calcutta Motor & Cycle Co., 5, Bentinck Street, Calcutta.
*9. Gopalkrishna Cycle Mart, V. H. Road, Coimbatore.
10. Union Cycle House, 168, Broadway, Madras.
11. Popular Cycle Trading Co., Cycle Dealers, Bangalore.

12. Nav Bharat Trading Corporation. Lashkar, Gwalior.
13. Chawla Cycle Stores, Omti, Jabalpur.
14. Royal Cycle Importing Co., Khadia, Char Rasta, Ahmedabad.
15. Kantilal & Co., Princess Street, Bombay-2.
16. Gupta Cycle Co., Princess Street, Bombay-2.
17. Advance Trading Coporation, Kalbadevi Road, Bombay-2.
18. Metro Cycle Co., Kalbadevi Road, Bombay-2.
19. V. S. Bros. & Co. Ltd., Bhangwadi, Bombay-2.
20. Oriental Import & Export Co., Kalbadevi, Bombay-2.
21. Union Cycle Co., Kalbadevi, Bombay-2.
22. Super Cycle Importing Co., Kalbadevi Road, Bombay-2.
*23. Master Cycle Trading Co., Budhwar Peth, Poona.
24. Kulkarni & Sons, Appa Balwant Chowk, Poona.
25. Nareshchandra & Co., Gita Ground, Sitabuildi, Nagpur.
*26. Dinesh Chandra & Co., Sitabuldi, Nagpur.

H. CONSUMERS

*1. The Secretary to the Govt. of India, Ministry of Transport & Communication, Department of Transport (Roadwing), Shahjahan Road, New Delhi.
*2. The Director General of Supplies & Disposals, Shahjahan Road, New Delhi.
*3. The Director General of Posts & Telegraphs, New Delhi.
*4. The General Manager, Damodar Valley Corporation, Purchase Department, Anderson House, Calcutta-27.
*5 The General Manager, Sindhri Fertilisers, Sindhri P.O. Manbhum, Bihar.
*6. The Officer-in-Charge, Canteen Stores Department, (Military Supplies), Ministry of Defence, New Delhi.
7. The Commissioner, Calcutta Municipal Corporation Calcutta.
8. The Commissioner, Bombay Municipal Corporation, Bombay.
*9. The Commissioner, Nagpur Municipal Corporation, Nagpur.
*10. The Commissioner, Poona Municipal Corporation, Poona.
11. The Commissioner, Delhi Municipal Corporation, Delhi.
*12. The Chairman, Bombay Port Trust, Ballard Pier, Bombay-1.
13. The Chairman, Calcutta Port Trust, Calcutta.
14. The Chairman, Madras Port Trust, Madras.
*15. Administrative Officer, Port of Cochin, Cochin.
*16. Kandla Port Project, Kandla.
*17. Light House Department, Ministry of Transport, Government of India, C. G. O. Building, 101, Queen's Road, Bombay-1.
*18. The Times of India, No. 1, D. N. Road, Bombay-1.
19. The Hindu, Madras-2.
20. The Statesman, Stateman House, Calcutta-1.
*21. Controller of Stores, North Eastern Railways, Gorakhpur.
22. Controller of Stores, Central Railway, Bombay.
*23. General Manager, Sourthern Railway, Perambur, Madras-23.
24. General Manager, Eastern Railway, Calcutta.
25. General Manager, Northern Railway, New Delhi.
26. General Manager, South Eastern Railway, Calcutta.

27. Controller of Stores, Western Railway, Churchgate, Bombay.
*28. Director, Government Printing & Stationery, Charni Road, Bombay.
29. Purchase Officer, M/S. Hindustan Chemical & Fertilisers Ltd., Naya Nangal.
30. Superintending Engineer, Dam Circle, Nagarjunasagar Project, Vijayapuri North, Dist. Nalganada.

I. IMPORTERS

1. English Cycle & Motor Importing Co., No. 224/9, Broadway, P.B. No. 1293, Madras-1.
2. Foreign Trade Association (Regd.) Virudhunagar, South India.
*3. Hashabi & Co., 295, Bowbazar Street, Calcutta.
4. Hales Brother (India) Ltd., Lekhraj Building, Carnac Bridge, Bombay-3.
5. Iron & Steel Hardware Merchants Chamber of India,153, Narayan Dhuru Street, Bombay-3.
6. Jankidas & Co., 23/F. Cannaught Place, P. B. No. 223, New Delhi.
7. Kathiawar Cycle & Motor Co., 525/27, Kalbadevi Road, P. B. No. 2104 Bombay-24.
8. Levetus (Agents) Private Ltd., 408/409, Himalaya House, Palton Road, Bombay.
9. Northern India Cycle Importers Association, C/o. Hitakri Brothers, 9 Faiz Bazar, Delhi.
10. Oriental Import & Export Co. (Bom.) Ltd., 441, Hasami Premji Building Kalbadevi Road, Bombay-2.
11. Palanivelu Cycle Stores, Vellakovi P.O. Erode, (S. Rly.).
12. The Rapid Cycle & Motor Co. Ltd., Kalbadevi Road, Opp. Edward Theater, Bombay-2.
13. Royal Cycle & Motor Co., 13/14, Broadway, Madras-1.
*14. The Burma Cycle Trading Co., 164, Broadway, Madras-1.
15. The India Cycle Traders' Association, 35, Bentinck Street, Calcutta.
*16. The Popular Cycle Importing Co., 8/9, Broadway, Madras-1.
17. The South India Cycle Importing Co., 7, Broadway, P. B. No. 1, Madras-1.
18. Vadilal R. Shah, Lalji Mansing Building, Lohar Chawl, Bombay-2.
19. The Metro Cycle Co., 421, Kalbadevi Road, Bombay-2.

J. IMPORTERS' ASSOCIATIONS

*1. The Madras Cycle Importers' Association, Broadway, Madras-1.
*2. All India Importers' Association, Churchgate House, Vir Nariman Road, Bombay-1.

K. CHIEF SECRETARIES OF STATES

*1. The Chief Secretary to the Government of Andhra Pradesh, HYDERABAD.
*2. The Chief Secretary to the Government of Assam, SHILLONG.
3. The Chief Secretary to the Government of Bihar, PATNA.
*4. The Chief Secretary to the Government of West Bengal, CALCUTTA.
5. The Chief Secretary to the Government of Gujarat, AHMEDABAD.
6. The Chief Secretary to the Government of Jammu and Kashmir SRINAGAR.
*7. The Chief Secretary to the Government of Kerala. TRIVANDRUM.

*8. The Chief Secretary to the Government of Madhya Pradesh, BHOPAL.
*9. The Chief Secretary to the Government of Maharashtra, BOMBAY.
*10. The Chief Secretary to the Government of Madras, MADRAS.
*11. The Chief Secretary to the Government of Mysore, BANGALORE.
*12. The Chief Secretary to the Government of Orissa, BHUBANESHWAR.
*13. The Chief Secretary to the Government of Punjab, CHANDIGARH.
14. The Chief Secretary to the Government of Rajasthan, JAIPUR.
*15. The Chief Secretary to the Government of Uttar Pradesh, LUCKNOW.
*16. The Chief Commissioner, Delhi Administration, DELHI.
17. The Chief Commissioner, Himachal Pradesh, SIMLA.

L. OTHER GOVERNMENT DEPARTMENTS

*1. The Collector of Customs, Bombay.
*2. The Collector of Customs, Calcutta.
*3. The Collector of Customs, Madras.
*4. The Collector of Customs, Cochin.
*5. The Senior Industrial Adviser, Development Wing, Ministry of Commerce and Industry, Udyog Bhavan, Maulana Azad Road, New Delhi.
*6. The Development Commissioner, Small Scale Industries, Ministry of Commerce and Industry, Udyog Bhawan, Maulana Azad Road, New Delhi.
*7. The Director, Indian Standards Institution, Manak Bhavan, 9, Mathura Road, New Delhi.
*8. Iron and Steel Controller, Netaji Subhas Road, Calcutta.
*9. First Secretary Commercial to the High Commission of India, 'India House', London, W.C. 2.
*10. First Secretary to the Embassy of India in Japan, 'Empire House', Marunouchi, Tokyo (Japan).
*11. The Secretary, Engineering Export Promotion Council, India Exchange, (7th floor), Calcutta.

सत्यमेव जयते

APPENDIX II

(*Vide* Paragraph 3·2)

List of units visited by the Commission and its officers

Name of the unit visited	By whom visited	Date of visit
1. Sen Raleigh Industries, Asansol.	1. Chairman. 2. Dr. S. K. Muranjan, Member. 3. Shri R. S. Bhatt, Member.	29th July, 1960.
2. India Cycle Mfg. Co. Ltd., Calcutta.	1. Chairman . . . . 2. Dr. S. K. Muranjan, Member. 3. Shri J. N. Dutta, Member. 4. Shri R. S. Bhatt, Member.	2nd August, 1960.
3. Small Scale Units in Calcutta.	1. Chairman . . . . 2. Shri J. N. Dutta, Member.	2nd August, 1960.
4. Wearwell Cycle Co. (I) Ltd., Faridabad. 5. Pearl Cycle Industries (P) Ltd., New Delhi.	1. Chairman . . . . 2. Dr. S. K. Muranjan, Member. 3. Shri R. S. Bhatt, Member.	26th August, 1960.
6. Atlas Cycle Industries, Sonepat.	1. Chairman . . . . 2. Dr. S. K. Muranjan, Member. 3. Shri J. N. Dutta, Member. 4. Shri R. S. Bhatt, Member.	27th August, 1960.
7. Small Scale units at Ludhiana.	Do.	29th August, 1960.
8. Small Scale units at Delhi.	Chairman	31st August, 1960.
9. Hind Cycles Ltd., Bombay.	1. Chairman . . . . 2. Dr. S. K. Muranjan, Member. 3. Shri J. N. Dutta, Member. 4. Shri R. S. Bhatt, Member. 5. Dr. Rama Varma, Secretary.	12th September, 1960.
10. T. I. Cycle o India, Ambattur.	Chairman	19th September, 1960.
11. Wheel & Rim Co. Ltd., Madras.	Do.	21st September, 1960.
12. Sen-Raleigh Industries, Asansol.	Shri Hari Bhushan Technical Director (Engg. & Met.)	12th February, 1960.
13. T. I. Cycles of India Ambattur.	Do.	15th March, 1960.
14. Hind Cycles Ltd., Bombay.	Do.	1st September, 1960.
15. T. I. Cycles of India, Ambattur.	Shri U. R. Padmanabhan, Cost Accounts Officer.	August, 1960.
16. Hind Cycles Ltd., Bombay.	Shri P. M. Menon, Cost Accounts Officer.	September, 1960.
17. Pearl Cycle Industries (P) Ltd., New Delhi.	Shri A. K. Banerji, Assistant Cost Accounts Officer.	August/September, 1960.

APPENDIX III

(*Vide* Paragraph 3·3)

List of persons who attended the public inquiry

Name of the representative	Representing
PRODUCERS' ASSOCIATIONS	
1. Shri M. G. Vohra 2. Shri G. Subramanyam	Cycle Manufacturers' Association of India, Calcutta.
3. Shri Ram Swaroop Takyar 4. Sardar Singh Gaur	United Ludhiana Cycle Manufacturers Association, Ludhiana.
5. Shri B. S. Chhatwal	Punjab Cycle Assemblers Union, Ludhiana.
LARGE SCALE PRODUCERS	
6. Shri A. M. M. Arunachalam 7. Shri B. A. Forsyth 8. Shri G. S. Kuppuswamy	T. I. Cycles of India, Madras.
9. Shri Abhijit Sen 10. Shri D. Chakraverti	Sen-Raleigh Industries, Calcutta.
11. Shri Bishamber Das 12. Shri Jai Dev Kapoor	Atlas Cycle Industries Ltd., Sonepat (Near Delhi).
Shri M. G. Vohra 13. Shri M. R. Sharda 14. Shri B. L. Kapoor	Hind Cycles Ltd., Bombay.
15. Shri S. Kumar 16. Shri Hans Paul Von Friedlein. 17. Shri M. Kumar	Pearl Cycle Industries (P) Ltd., New Delhi.
18. Shri Ravi Prakash	Hindustan Vehicles Ltd., Calcutta.
19. Shri M. C. Gupta	India Cycle Mfg. Co., Calcutta.
20. Shri R. C. Bhalla 21. Shri N. C. Bhalla 22. Shri G. K. Mulay 23. Shri Brijmohanlal	H. R. Bhalla & Sons (P) Ltd., Delhi-7. Hero Cycle Industries, Ludhiana.
COMPONENT MANUFACTURERS	
24. Shri O. P. Chopra 25. Sardar Prakash Singh	S. P. W. Cycle Industries, Ludhiana.
26. Shri M. D. Mehta	New Haven Steel Ball Corporation, Bombay.
27. Shri S. K. Shah	Shah Industries, Bombay.
28. Shri P. L. Kumar	Wheel and Rim Co. of India Ltd., Madras.
29. Shri K. R. Menon	Dunlop Rubber Co. (India) Ltd., Calcutta.

30. Shri P. C. Sharma . . Indian Cycle and Wire Industries, Delhi.

31. Shri K. R. Bhatia . . Transmissions (Private) Ltd., Bhandup, Bombay.

32. Shri L. B. Bhatt . . . Weldone Cycle Co., Hyderabad.

TUBE MANUFACTURERS

33. Shri S. K. Shah . . . Premier Automobiles Ltd., Bombay.

34. Shri S. R. Mistry . . . Godrej and Boyce Mfg. Co. Ltd., Bombay.

DEALERS

35. Shri C. C. Udeshi . . Metro Cycle Co., Bombay.

36. Shri M. F. Vaswami . . Sen and Pandit, Bombay.

37. Shri V. M. Arekar . . T. I. & M. Sales, Bombay.

38. Shri C. B. Bhatt . . . Oriental Import & Export Co., Bombay.

DEALERS' ASSOCIATION

39. Shri K. K. Jain } . . The Traders' Chamber of Uttar Pradesh, Kan-
40. Shri P. C. Agarwal } . . pur.

IMPORTERS' ASSOCIATION

41. Shri R. C. Shah } . .
42. Shri K. K. Manseta } . . All India Importers' Association, Bombay.

CONSUMERS

43. Shri I. K. Gupta . . The Director General of Posts & Telegraphs, New Delhi.

44. Shri M. N. Nair . . . Canteen Stores Department (Military Supplies Ministry of Defence, New Delhi.

GOVERNMENT DEPARTMENTS

45. Col. V. P. S. Menon } . . Development Wing, Ministry of Commerce and
46. Shri R. Rama Rao } . . Industry, New Delhi.

47. Dr. S. L. Sharma . . Development Commissioner, Small Scale Industries, New Delhi.

48. Lt. Col. O. G. Eapen . . Iron and Steel Controller, Calcutta.

49. Shri A. B. Rao . . . Indian Standards Institution, New Delhi.

OBSERVERS

50. Shri S. R. Gupta.

51. Shri V. D. Mehta.

52. Shri Kishu Gidwaney.

53. Shri U. D. Mehta.

APPENDIX IV

(*Vide* Paragraph 6·1)

Statements showing the names of bicycle manufaceturers, year of commencement of their production, licensed installed capacity & production

Sl. No.	Name of the Company	Year of commencement of production	Capacity at the time of the last inquiry		Capacity at present		Production					
			Licensed	Installed (Single shift)	Licensed	Installed (Single shift)	1951	1953	1957	1958	1959	1960 (Jan-June)
1	2	3	4	5	6	7	8	9	10	11	12	13
1	Hind Cycles Ltd. Bombay.*	1941	2,00,000†	1,00,000†	2,00,000	1,00,000	101,433	115,832	1,56,094	1,44,221	1,50,890	69,968
2	Hindustan Vehicles, Patna†(Formerly Hindustan Bicycle Mfg. and Industrial Corporation).	1942	60,000	30,000	60,000	30,000	12,842	10,240	15,146	21,019	29,617	15,135
3	India Cycle Mfg. Co. Calcutta.*	1949	60,000†	30,000	30,000	30,000	..	9,330	22,983	29,179	17,520	15,354
4	T.I. Cycles of India, Madras ‡*	1951	2,00,000	2,00,000	3,00,000	3,00,000	..	46,123	1,88,276	2,00,665	2,00,667	75,974
5	Atlas Cycle Industries, Ltd., Sonepat.*	1952	2,00,000	2,00,000	2,00,000	2,00,000	..	44,837	1,44,715	1,82,504	2,00,112	98,042
6	Sen-Raleigh Industries of India Ltd., Calcutta.‡	1952	2,00,000	1,00,000	2,00,000	2,00,000	..	37,807	97,909	1,12,368	1,69,413	88,582
7	Avon Cycles, Ludhiana	1954	12,000	12,000	24,000	12,000	..	..	15,002	18,614	22,562	13,894
8	H. R. Bhalla & Sons (Pvt) Ltd., Delhi*	1955	60,000	60,000	30,000	30,000	..	..	19,107	16,644	15,199	8,583
9	Wearwell Cycle Co, Ltd., Faridabad.	1955	50,000	50,000	50,000	50,000	..	..	20,654	29,265	35,701	27,120

10	Pearl Cycle Industries, New Delhi.*	1955	48,000†	24,000	32,000	55,000	..	..	50,632	52,302	57,257	33,502
11	Popular Cycle Mfg. Co. Agra.	1955	15,000	15,000	15,000	15,000	..	..	5,333	4,638	3,096	1,400
12	Hero Cycle Industries, Ludhiana.*	1956	7,500	7,500	25,000	25,000	..	..	7,471	11,333	13,355	9,499
13	Metal Goods Mfg. Co., Banaras.	1956	15,000	15,000	15,000	15,000	..	..	6,767	5,520	8,068	7,961
14	Gopal Metal Works, Lucknow.	1956	40,000	40,000	40,000	40,000	..	..	22,947	26,405	9,935	6,894
15	Roadmaster Industries Rajpura.	1956	50,400†	25,500	25,000	25,000	..	..	12,897	14,502	16,252	12,478
16	Rampur Engineering Co. Rampur (U.P.).	1956	20,000	20,000	20,000	20,000	..	..	500	8,464	5,333	5,206
17	Zenith Cycle Industries, Delhi.*	1957	..	..	24,000	24,000	..	..	9,000	18,000	15,025	8,800
18	Steelsons (P) Ltd., Modinagar. (U.P.).	1958	..	..	20,000	20,000	..	..	..	10,500	9,700	5,250
19	Prakash Engg. Co., Lucknow.	1958	..	..	15,000	15,000	..	..	..	5,921	11,280	5,985
20	Indian Malleable Castings, Calcutta.*	1960	..	..	30,000	30,000	..	..	..	..	..	..
21	Everest Industrial Corporation, Gauhati.*	1960	..	..	60,000	60,000	..	..	..	..	..	..
22	Nundy & Co., Calcutta**	1955	25,000	25,000	..	..	..	..	1,116	613	..	..
	TOTAL .		12,62,900	9,54,000	14,15,000	12,96,000	1,14,275	2,64,169	7,96,549	9,12,677	9,90,982	5,09,627

*Have surplus capacity for certain components.

†Double Shift.

**Discontinued the manufacture of complete bicycles in 1958.

‡Have foreign collaboration.

APPENDIX V

(*Vide* Paragraph 6·2)

Statement giving details of units manufacturing bicycles in the small scale sector in 1959

Sl. No.	Name of State	Approved capacity		Production	
		No. of units	Bicycles	No. of units	Bicycles
1	2	3	4	5	6
1	Delhi	12	64,000	12	52,223
2	Punjab	43	1,19,000	19	62,140
3	West Bengal	13	41,500	9	17,919
4	Bombay	5	27,500	4	7,106
5	Uttar Pradesh	10	51,500	7	22,448
6	Rajasthan	6	27,500	6	15,193
7	Madhya Pradesh	4	18,000	3	8,577
8	Madras	6	27,500	1	3,618
9	Andhra Pradesh	12	40,000	2	2,434
10	Mysore	3	15,000	1	..
11	Bihar	3	15,000	3	1,998
12	Pondicherry	1	7,500	..	..
13	Orissa	3	15,000	1	3,196
14	Assam	3	15,000	..	..
15	J & K	5	25,000	..	..
16	Kerala	1	5,000	..	..
	TOTAL	130	5,14,000	68	1,97,452

APPENDIX VI

(*Vide* Paragraph 7·1·2)

Statement I showing capacity of large scale manufacturers to produce certain components on single shift

(As furnished by the Development Wing)

Sl. No.	Name of the Company	Saddles (Nos.)	Hubs (Nos.)	Rims (Nos.)	Chains (Pieces)	Spokes (Gross)	Free-wheels (Nos.)
1	Sen-Raleigh Industries	5,40,000	5,40,000	..	5,40,000	3,00,000	5,40,000
2	Atlas Cycle Industries	2,85,000	2,40,000	..	..	75,000	..
3	T. I. Cycles of India	4,80,000*	5,00,000	..	10,20,000*	2,75,000	6,90,000
4	Avon Cycles Ltd.	36,000*	..	..	..	..	..
5	India Cycle Mfg. Co.	..	30,000	..	..	..	..
6	Hind Cycles Ltd.	..	1,00,000	3,00,000	3,00,000	..	1,00,000
7	Pearl Cycle Industries	..	48,000*	..	..	60,000*	..
8	Roadmaster Industries	..	..	..	..	60,000*	..
9	Everest Industrial Corporation	..	..	..	..	60,000*	..
10	Popular Cycle Mfg. Co.	..	..	..	..	60,000*	..
	TOTAL CAPACITY	13,41,000	14,58,000	3,00,000	18,60,000	8,90,000	13,30,000
	In Production	8,25,000	14,10,000	3,00,000	8,40,000	7,10,000	13,30,000
	Yet to commence production	5,16,000	48,000	..	10,20,000	1,80,000	..

*The production of these items has not yet commenced.

APPENDIX VI—*contd.*

Statement II showing capacity of ancillary units (on single shift) registered with the Development Wing.

Name of the unit	Saddles (Nos.)	Hubs (Nos.)	Rims (Nos.)	Chains (Pieces)	Spokes (Gross)	Free-Wheels (Nos.)
A. *Units that have commenced production.*						
1. Standard & Co., Kanpur . .	300,000	..	..	..	..	..
2. Imperial Technical Works, Delhi .	12,000	..	..	..	..	..
3. Malhotra & Co., Delhi . . .	N.A.	..	..	..	..	..
4. Indo-Belga Engg. Co., Ahmedabad .	..	180,000	..	..	..	..
5. Republic Engg. Corp. Calcutta. .	..	51,000	..	..	..	..
6. Dunlop Rubber Co., Calcutta . .	..	..	877,000	..	..	..
7. Nundy & Co., Calcutta . . .	..	..	480,000	..	..	..
8. Wheel & Rim Co., Madras . .	..	..	856,000	..	..	..
9. Kerala Govt. Rim Factory, Trivandrum. .	..	..	300,000	..	..	..
10. Velo Industries, Bhavanagar . .	..	..	..	225,000	..	..
11. Shah Industries, Bombay . .	..	..	..	..	120,000	..
12. Indian Cycle & Wire Industries, Delhi	..	..	..	..	60,000	..
13. Hindustan Cycle Acc. Delhi. . .	..	..	..	..	120,000	..
14. Kumar Industries, Allahabad . .	..	..	..	..	60,000	..
15. Bharat Industries, Rajpura . .	..	..	..	..	60,000	..
TOTAL A .	312,000	231,000	2,513,000	225,000	420,000	..

B. *Units that have to commence production.*						
1. Cawnpore Tannery Ltd., Kanpur	90,000	..	..	..	..	..
2. Avery Cycle Industries, Ludhiana	..	100,000	..	..	..	500,000
3. Sen & Pandit Ltd.,	..	..	240,000	..	..	..
4. S. K. Agencies (P) Ltd., Aligarh	..	..	..	90,000	..	..
5. Hindustan Cycle Acc. Delhi	..	..	..	240,000	..	..
6. Pearl Roller Chain Mfg. Co., New Delhi.	..	..	..	180,000	..	..
7. Hillman Industries, Calcutta	..	..	..	246,000	..	..
8. Transmission (P) Ltd., Bombay	..	..	..	300,000	..	..
9. Konark Industries, Cuttack	..	..	..	232,500	..	..
10. Marshall Industries, New Delhi	..	..	..	240,000	60,000	..
11. Modern Trade Corp. Delhi	..	..	..	300,000	..	..
12. Delta Cycle Fittings, Delhi	..	..	..	240,000	..	..
13. Hindustan Engg. Works, Delhi	..	..	..	..	60,000	..
14. S. Nath & Co. Delhi	..	..	..	..	60,000	..
15. Velo Industries, Bhavanagar	..	..	..	..	..	400,000
16. Packson Free-Wheels, New Delhi	..	..	..	..	..	800,000
17. Free-Wheels India Ltd., Delhi	..	..	..	..	..	600,000
18. Imperial Technical Works, Delhi	..	..	..	..	..	60,000
TOTAL B.	90,000	100,000	240,000	2,068,500	180,000	2,360,000
TOTAL A & B.	402,000	331,000	2,753,000	2,293,500	600,000	2,360,000

APPENDIX VII

(*Vide* Paragraph 7·2·2.)

Statement showing production of components in large scale sector

Item	Name of the unit	Licensed capacity on single shift	Unit	Production			
				1957	1958	1959	1960 (Jan.-June)
	2	3	4	5	6	7	8
I. *Saddles.*							
1	Standard & Co., Kanpur	3,00,000	Nos.	1,09,462	1,24,565	1,24,520	83,492
2	Sen-Raleigh Industries, (I), Calcutta . . .	5,40,000	,,	1,15,905	1,32,440	2,39,476	1,10,328
3	Atlas Cycle Industries, Sonepat	2,85,000	,,	9,913	5,029	1,91,763	98,128
4	Cawnpore Tannery Ltd., Kanpur	90,000	,,	Not commenced production			
5	T. I. Cycles of India, Madras	4,80,000	,,	Not commenced production			
6	Imperial Tech. Works, Delhi	12,000	,,	..	..	..	18,371

7	Avon Cycles, Ludhiana	36,000		..	..	..	19,215
8	Malhotra & Co., Delhi	N.A.		..	..	..	11,317
		17,43,000		2,35,280	2,62,034	5,55,759	3,40,849
II.	*Hubs.*						
1	Atlas Cycle Industries, Sonepat	2,40,000	Nos.	..	..	6,800	Nil.
2	Indo-Belga Engg. Co., Ahmedabad . . .	1,80,000	„	1,17,966	1,08,687	1,69,576	71,135
3	T. I. Cycles of India, Madras	5,00,000	„	3,82,231	4,99,986	5,42,074	2,36,954
4	Sen-Raleigh Industries, Ltd.	5,40,000	„	4,84,263	4,83,751	6,42,930	5,56,774
5	India Cycle Mfg. Calcutta	30,000	„	..	..	..	5,836
6	Republic Engg. Corp., Calcutta	51,000	„	..	..	..	Nil.
7	Hind Cycles, Bombay	1,00,000	„	..	..	3,01,780	..
8	Avery Cycle Industries, Ludhiana	1,00,000	„	Not yet commenced production			
9	Pearl Cycle Industries, New Delhi	48,000	„	..	..	..	35,646
		17,89,000	„	9,84,460	10,92,424	16,56,360	9,06,345

APPENDIX VII—*contd.*

1	2	3	4	5	6	7	8
				1957	1958	1959	1960 (Jan.-June)
	III. *Rims.*						
1	Dunlop Rubber Co., Calcutta	8,77,000	Nos.	14,04,064	16,09,940	18,97,177	10,53,118
2	Nundy & Co., Calcutta	4,80,000	„	57,746	66,880	33,170	1,597
3	Hind Cycles Ltd., Bombay	3,00,000	„	3,72,689	4,02,900	3,99,176	1,63,028
4	Wheel & Rim Co., Madras	8,56,000	„	4,37,650	5,94,880	6,12,123	4,19,136
5	Sen & Pandit Ltd., Calcutta	2,40,000	„	Not yet commenced production.			
6	Tranvancore Rubber Works, Trivandrum. (Kerala Govt. Rim Factory)	3,00,000	„	..	..	15,175	36,727
		30,53,000	„	22,72,149	26,74,600	29,56,821	16,73,606
	IV. *Free-Wheels.*						
1	Hind Cycles Ltd., Bombay	1,00,000	„	68,049	85,498	1,30,003	71,716
2	T. I. Cycles of India, Madras	6,90,000	„	1,21,662	4,20,546	3,52,034	1,53,151
3	Sen-Raleigh Industries of (I) Ltd., Calcutta	5,40,000	„	Nil	Nil	1,40,356	1,04,285
4	Velo Industries, Bhavanagar	4,00,000	„	Not yet commenced production.			
5	Packson Free-Wheels, New Delhi	8,00,000	„		Ditto.		
6	Free-Wheels India Ltd., Delhi	6,00,000	„		Ditto.		
7	Avery Cycle Industries, Ludhiana	5,00,000	„		Ditto.		
8	Imperial Tech. Works, Delhi	60,000	„		Ditto.		
		36,90,000		1,89,711	5,06,044	6,22,393	3,29,152

V. *Chains.*

1	Hind Cycles Ltd., Bombay	3,00,000	Nos.	1,69,977	2,12,693	2,29,563	1,04,834
2	Sen-Raleigh Industries of India Ltd. Calcutta . .	5,40 000	„	2,82,190	2,92,280	4,59,308	2,95,754
3	Velo Industries, Bhavanagar	2,25,000	„	..	..	2,67,441	1,73,838
4	S. K. Agencies (P) Ltd., Aligarh	90,000	„	Not yet commenced production.			
5	Hindustan Cycle Acc., Delhi	2,40,000	„		Ditto.		
6	Pearl Roller Chain Mfg., Co., New Delhi . .	1,80,000	„		Ditto.		
7	Hillman Industries, Calcutta	2,46,000	„		Ditto.		
8	Transmission (P) Ltd., Bombay	3,00,000	„		Ditto.		
9	Konark Industries, Cuttack	2,32,500	„		Ditto.		
10	T. I. Cycles of India, Madras	10,20,000	„		Ditto.		
11	Marshall Industries, New Delhi	2,40,000	„		Ditto.		
12	Modern Trade Corporation, Delhi	3,00,000	„		Ditto.		
13	Delta Cycle Fittings, Delhi	2,40,000	„		Ditto.		
		41,53,500	„	4,52,167	5,04,973	9,56,312	5,74,426

APPENDIX VII—*contd.*

1	2	3	4	5	6	7	8
				1957	1958	1959	1960 (Jan.-June)
VI	*Spokes.*						
1	Shah Industries Ltd., Bombay	1,20,000	Gross	1,84,957	1,59,356	1,78,869	79,401
2	Indian Cycle & Wire Industries, Delhi . . .	60,000	„	25,700	67,830	73,100	36,000
3	Hindustan Cycle Acc., Delhi	1,20,000	„	1,17,500	1,00,200	1,04,000	55,600
4	Roadmaster Industries, Rajpura	60,000	„	69,942	89,738	70,546	29,355
5	T. I. Cycle of India Ltd., Madras	2,75,000	„	1,12,859	1,69,354	1,09,465	38,856
6	Sen-Raleigh Industries, Calcutta	3,00,000	„	1,98,337	1,76,983	1,48,641	95,985
7	Kumar Industries, Allahabad	60,000	„	..	25,300	28,976	14,697
8	Bharat Industries, Rajpura	60,000	„	..	..	52,992	34,752
9	Atlas Cycle Industries, Sonepat	75,000	„	..	..	77,970	49,782
10	Popular Cycles Mfg. Co., Agra	60,000	„	Not yet commenced production			
11	Marshall Industries, New Delhi	60,000	„		Ditto.		
12	Pearl Cycle Industries, Delhi	60,000	„		Ditto.		
13	Hindustan Engg. Works, Delhi	60,000	„		Ditto.		
14	S. Nath & Co., Delhi	60,000	„		Ditto.		
15	Everest Industrial Corporation, Gauhati . . .	60 000	„		Ditto.		
		14,90,000	„	7,09,295	7,88,761	8,44,559	4,34,428

APPENDIX VIII

(*Vide* Paragraph 12·2)

Statement showing country-wise imports of bicycles and components from 1957 *to* 1960 (*January—March*)

Countries of origin	Unit of Quantity	1957		1958		1959		1960 (Jan.-March,)	
		Quantity	Value	Quantity	Value	Quantity	Value	Quantity	Value
			Rs.		Rs.		Rs.		Rs.
				A. *Bicycles*					
1. United Kingdom	Nos.	86,844	93,94,372	7,283	8,77,738	356	49,997	6	1,050
2. West Germany	Do.	51	14,991	..	..	1	110	6	1,645
3. Japan	Do.	224	17,930	2	160	4	595	52	7,400
4. Italy	Do.	801	87,006	..	..	..	..	..	..
5. Singapore	Do.	..	..	..	..	309	51,130	150	21,370
6. Other countries	Do.	2,260	3,30,602	36	66,028	26	4,889	44	4,380
TOTAL	..	90,180	98,44,901	7,321	9,43,926	696	1,06,721	258	36,845
				B. *Chains*					
1. United Kingdom	Cwt.	5,220	12,96,872	2,804	6,70,895	3,968	8,73,331	1,537	3,77,366
2. West Germany	Do.	171	23,298	130	28,306	540	97,237	220	34,803
3. Japan	Do.	117	40,316	667	1,10,878	2,363	3,63,816	499	88,544
4. Czechoslovakia	Do.	781	1,04,910	1,451	3,12,894	1,866	2,59,761	541	81,868
5. China	Do.	..	..	534	61,841	2,040	2,65,870	1,054	1,40,664
6. Other countries	Do.	17	4,797	16	1,734	65	21,268	75	12,566
TOTAL	..	6,306	14,70,193	5,592	11,85,548	10,842	18,81,283	3,926	7,35,811

APPENDIX VIII—*contd.*

Countries of origin	Unit of Quantity	1957		1958		1959		(1960 Jan.-March)	
		Quantity	Value	Quantity	Value	Quantity	Value	Quantity	Value
			Rs.		Rs.		Rs.		Rs.
				C. *Free-wheels*					
1. United Kingdom . . .	Cwt.	6,778	24,10,195	2,416	10,69,157	2,368	9,24,774	482	1,97,858
2. West Germany . . .	Do.	5	1,440	211	1,03,621	180	55,772	85	28,462
3. Japan	Do.	294	72,757	109	34,321	109	20,459	27	7,210
4. China	Do.	438	1,21,768	969	2,62,566	1,866	5,03,064	379	94,061
5. Other countries . . .	Do.	4	2,582	75	25,861	670	2,03,058	147	54,374
TOTAL . .		7,519	26,08,742	3,780	14,95,526	5,193	17,07,027	1,120	3,81,965
				D. *Other Parts*					
1. United Kingdom	..	..	1,23,62,814	..	60,23,098	..	33,97,136	..	8,75,434
2. West Germany	..	..	10,14,367	..	3,51,028	..	2,13,728	..	60,210
3. Japan	..	..	9,21,341	..	3,05,111	..	47,762	..	62,974
4. Czechoslovakia	..	..	87,789	..	..	..	3,548	..	..
5. Italy	..	..	2,28,903	..	74,387	..	1,02,283	..	48,701
6. Other countries	..	..	3,04 113	..	1,52,508	..	14,993	..	5,960
TOTAL . .	..	..	1,49,19,327	..	69,06,132	..	37,79,450	..	10,53,279

APPENDIX IX

(*Vide* Paragraph 13·5)

Statement showing destination-wise exports and re-exports of bicycles and components from 1957 to 1960 (January—March)

I. *Bicycles*

Sl. No.	Country of destination	1957		1958		1959		1960 (January-March)	
		Quantity	Value	Quantity	Value	Quantity	Value	Quantity	Value
			Rs.		Rs.		Rs.		Rs.
				A. *Exports*					
1	Pakistan East	1	250	..	..	..	..	1	180
2	Saudi Arabia	12	975	3	290	..	..	..	..
3	Burma	1	188	1	137	4,873	7,29,263	273	32,578
4	Nepal	5	475	3	300	1	125	..	..
5	Maladives	..	..	3	659	..	..	..	..
6	Malaya	..	..	4	820	12	1,254	..	..
7	Afghanistan	..	..	180	21,990	1,990	2,27,852	233	27,889
8	Iran	..	..	..	..	135	13,553	..	..
9	Viet Nam-R.	..	..	..	..	3	580	..	..
10	Nigeria	..	..	..	..	24	2,613	..	..
11	Zanzibar	..	..	..	..	15	2,310	..	..
12	Lebanon	..	..	..	..	4	397	..	..
13	Thailand	..	..	..	..	1	100	..	..
14	Northern Rhodesia	..	..	..	..	100	8,800	..	..
15	Egypt	..	..	..	..	1	110	1	105
16	Iraq	..	..	..	..	..	..	1	105
17	Sudan	..	..	..	..	..	..	17	1,985
	TOTAL EXPORTS	19	1,888	194	24,144	7,159	9,86,957	526	62,842

APPENDIX IX—*contd.*

Sl. No.	Country of destination	1957		1958		1959		1960 (January-March)	
		Quantity	Value	Quantity	Value	Quantity	Value	Quantity	Value
			Rs.		Rs.		Rs.		Rs.
				B. *Re-Exports*					
1	Nepal	3	301	..	..	1	267	..	..
2	United Kingdom	..	..	47	3,811	..	..	..	..
3	Afghanistan	..	..	52	6,992	..	..	..	..
4	Ceylon	..	..	..	..	25	3,347	..	..
	TOTAL RE-EXPORTS .	3	301	99	10,803	26	3,614	..	..
	TOTAL EXPORT & RE-EXPORTS .	22	2,189	293	34,947	7,185	9,90,571	526	62,842

II. *Components*

Sl. No.	Name of the Component	Unit	1957		1958		1959		1960	
			Quantity	Value	Quantity	Value	Quantity	Value	Quantity	Value
				Rs.		Rs.		Rs.		Rs.
A. Exports										
1	Chains	Cwt.	N	2	1	129	N	257	..	..
2	Forks.	Do.	2	895	..	..	N	390	..	..
3	Frames	Do.	N	20	..	..	..	..	..	..
4	Free Wheels	Do.	N	4	..	..	N	98	..	..
5	Saddles	Nos.	498	5,407	98	896	467	2,924	100	799
6	Wheel Cranks	Cwt.	..	..	N	62	..	..	..	..
7	Handle Bars.	Do.	..	..	N	71	N	147	..	..
8	Rims	Do.	..	..	3	307	22	3,551	..	..
9	Spokes	Do.	..	..	..	..	1	193	..	..
10	Other Parts	Do.	629	1,61,432	780	1,91,616	700	1,53,035	262	50,292
	TOTAL EXPORTS	..	..	1,67,760	..	1,93,081	..	1,60,595	..	51,091
B. Re-Exports.		Cwt.	..	..	4	2,220	..	..	..	..
	TOTAL EXPORTS & REEX-PORTS	..	..	1,67,760	..	1,95,301	..	1,60,595	..	51,091

N—Negligible.

APPENDIX X

[*Vide* Paragraph 16.1]

Statement showing c. i. f. prices and landed costs of imports of bicycle components

Sl. No.	Source of information	Origin of import	Date of import	Type and Specifications	C. i f. price	Customs Duty	Clearing charges	Landed cost
1	2	3	4	5	6	7	8	9
					Rs.		Rs.	Rs.
				A. *Cycle Chains*				
1	Collector of Customs, Calcutta	Japan	March 1960	I.C. M½″ × 1/8″ × 114 links	1·45	75%	0·07	2·54
		U.K.	Do.	I.C. M½″ × 1/8″ × 114 links coventry	2·08	65%	0·10	3·53
		Japan . .	June 1960	DID ½″ × 1/8″ × 114L	1·51	75%	0·86	2·70
		Czechoslovakia	Do.	Favorite ½″ × 1/8″ × 112L	1·26	75%	0·06	2·27
		China . .	Do.	Red Star, Triangle ½″X1/8″X112L	1·26	75%	0·06	2·27
2	Collector of Customs, Madras	U.K. . .	June 1960	½″ × 1/8″ × 112L	..	..	..	3·75
		China . .	Do.	Do.	..	..	..	2·12
3	Collector of Customs, Bombay	U.K. . .	..	Coventry ½″ × 1/8″ × 112L	2·06	1·34	0·02	3·42
		U.K. . .	..	Perrychain ½″ × 1/8″ × 112L	2·00	1·30	0·02	3·32
		France. .	..	Brampton ½″ × 1/8″ × 112L	1·94	1·46	0·02	3·42
		Czechoslovakia	..	Favorite ½″ × 1/8″ × 120L	1·37	1·03	0·01	2·41

		Germany .	..	Pallas ½″ × 1/8″ × 112L		1·37	1·03	0·01	2·41
		China .	..	Redstar ½″ × 1/8″ × 112L or 114L		1·50	1·18	0·02	2·70
		Japan .	..	DID Brand ½″ × 1/8″ × 121L		1·50	1·18	0·02	2·70
		Japan .	..	K.E.C. Brand		1·31	0·98	0·01	2·30
4	Embassy of India in Japan (Mizutani Ringyo Co. Ltd.).	Japan .	..	M.I.T. ½″ × 1/8″ × 114L		1·39*	..	..	..
5	Hashabi & Co., Calcutta	Japan .	Oct. 1959	DID Brand ½″ × 1/8″ × 112L		..	..	..	2·22
6	Madras Cycle Importers Association, Madras.	China .	..	..		1·34	1·00	0·06	2·40
7	Burma Cycle Trading Co., Madras.	China .	Jan. 1960	½″ × 1/8″ × 112L		1·29	0·97	0·03	2·29
			B. *Free Wheels*						
1	Collector of Customs, Calcutta	U. K. .	April 1960	Villiers model de luxe 18T × ½″ × 1/8″		1·93	65%	0·09	3·27
		U. K. .	June 1960	B. W.	Do.	2·00	65%	0·10	3·40
		Czechoslo-vakia	June 1960	Asia.	Do.	1·15	75%	0·06	2·08
		China .	May 1960	Three Star Pegion	Do.	1·20	75%	0·06	2·16
2	Collector of Customs, Madras	China	May 1960	..		..	75% + Rs. 2/-	..	4·06
		U. K. .	May 1960	..		..	65% + Rs. 2/-	..	5·70

1	2	3	4	5	6	7	8	9
				B. *Free Wheels*—contd.				
					Rs.		Rs.	Rs.
3	Collector of Customs, Bombay.	U. K. .	. ..	B.W. $\frac{1}{2}'' \times 1/8'' \times 18$.	2·06	1·34+ Rs.2·00	0·02	5·42
		China .	. ..	Ditto.	1·37	Rs.1·03+ Rs.2·00	0·01	4·41
4	Embassy of India in Japan (Mizutani Ringyo Co. Ltd.).	Japan .	. ..	$\frac{1}{2}'' \times 1/8'' \times 18$ full balls. $\frac{1}{2}'' \times 1/8'' \times 22$ full balls.	2·16* 2·90*	... ...	... ...	... ...
5	Madras Cycle Importers' Association, Madras..	China .	. ..	..	1·30	1·00+ Rs.2·00	0·06	4·36
6	Burma Cycle Trading Co., Madras.	China .	Feb. 1960	$\frac{1}{2}'' \times 1/8'' \times 18$T.	1·24	0·92+ Rs.2·00	0·03	4·19
				C. *Hubs*				
1	Collector of Customs, Calcutta	U. K. .	. June 1960	Philips No. 36 Front $6\frac{1}{2}''$	1·78	65%	0.22	7·40
		U. K. .	. June 1960	BW No. 100 front 32/40 holes No. 201 rear.	4·05 (per pair)	75%	0·20	6·88
		Czechoslovakia	June 1960	Asia 32/40 holes	3·00 (per pair)	75%	0·15	5·40

2	Collector of Customs, Bombay	U. K.	..	No. 36 and No. 39.	4·25 (per pair)	Rs. 2·77	0·04	7·06
3	Embassy of India in Japan (Mizutani Ringyo Co. Ltd., Tokyo).	Japan	..	Chromium Plated.	4·42* (per pair).	..	..	..
		Japan	..	Coaster Hubs—Chromium Plated	9·92* (per piece).	..	..	..
4	Madras Cycle Importers' Association, Madras.	U. K.	..	..	4·56	Rs.2·94	0·06	7·56 (per pair)
				D. *B. B. Axles.*				
1	Collector of Customs, Calcutta.	U. K.	June 1960	B.W. No. 14 Black.	10a65 (per dozen)	65%	0·53	18·10
		U. K.	June 1960	No. 12 Black.	11·59 (per dozen)	65%	0·58	19·70
2	Hashabi & Co., Calcutta	U. K.	Feb. 1960	..	..	..	..	19·20 (per dozen)
3	Madras Cycle Importers' Association, Madras.	U. K.	..	..	11·37 (per doz.)	Rs.7·44	0·12	18·93
				E. *B. B. Cups*				
1	Collector of Customs, Calcutta.	U. K.	May 1960	B. W. No. 2 & 3 (Black).	0·67 (per pair).	65%	0·03	1·13
2	Madras Cycle Importers' Association, Madras.	U. K.	..	..	0·96 (per set).	Rs.0·63	0·01	1·60

APPENDIX X—*contd.*

1	2	3	4	5	6	7	8	9
				F. *Fork Head Fittings*	Rs.		Rs.	Rs.
1	Collector of Customs, Calcutta.	U. K. .	. June 1960	*Lock Nuts* TDCD-12 Chromium plated.	39·34 (per gross)	65%	1·96	66·87
		U. K. .	.	*Screw Races* TDCD-15 Chromium plated.	38·68 (per gross).	65%	1·93	65·74
				G. *Spokes*				
1	Collector of Customs, Bombay.	Italy .	.	15 × 12 1/8	2·70	Rs. 2·02	0·02	4·74
		Italy .	.	14 × 12 1/8	2·75	Rs. 2·06	0·02	4·83
2	Embassy of India in Japan (Mizutani Ringyo Co. Ltd.).	Japan .	.	28 × 15 G with nipple & washers.	4·22* (per gross).	. .	. .	.
				H. *Others**				
1	Embassy of India in Japan (Mizutani Ringyo Co. Ltd.).			*Front Fork*—Black with chromium plated crown cover.	2·59			
				Mudguard—Black with plated stays.	4·75 (per pair).			
				Chainwheel with Crank—$\frac{1}{2}$ × 1 × 48T with 7" square or oval crank, chromium plated.	4·94 (per set).			

Saddle—with black enamelled springs.	4·27
Handle Bar—with double brake levers, chromium plated.	4·99
Pedal—C. plated with 4″ full rubbers.	2·35 (per set).
Gear Case—Black enamelled .	3·94
Chain Guard—Black enamelled.	1·10
Tool—Bag	1·54
Bell—(brass)	0·86
Stand—Chromium plated . .	1·90
Luggage carrier—Black enamelled	2·74
Frame pump	1·82
Rim—28″ × 1½″ Chromium plated	6·86 (per pair)
Handle Bars—20½″ wide. . .	3·26
Barke front & *rear*—with clip fastening.	2·71 (per set)

*These are not c.i.f. prices, but quotations. f.o.b. Yokohama.

APPENDIX XI

(*Vide* Paragraph 17·1.)

Statement showing the selling prices of indigenous bicycles

Sl. No.	Name of the manufacturer	Make and specification	Prices charged in				
			1954	1955	1956	1959	1960
			Rs.	Rs.	Rs.	Rs.	Rs.
1	Hind Cycles Ltd., Bombay	Hind	135·0	135·0	135·0	135·0	145·0
2	Sen-Raleigh Industries of India Ltd., Asansol	Raleigh, Rudge & Humber.	176·0	176·0	164·5	164·5	181·0
		Robinhood	161·0	161·0	151·0	156·5	169·0
3	T. I. Cycles of India Ltd., Ambattur	'Hercules' Popular, black model.	161·5	156·0	148·5	141·0	154·0
4	Atlas Cycle Industries Ltd., Sonepat	Eastern Star	147·0	139·0	129·0	123·5	138·5
5	Pearl Cycle Industries (P) Ltd., New Delhi	Royal Supreme	..	..	141·0	129·0	140·0
6	Avon Cycles Ltd., Ludhiana	Avon	125·0	130·0	136·0	128·0	138·0
7	H. R. Bhalla & Sons, Delhi	Forward	..	139·0	141·0	133·0	140·0
8	India Cycle Mfg. Co., Calcutta	Roadster	..	..	120·0	125·0	135·0

GIPN—S—16 T. C.Bom '60—23-3 '61—540