

Research on the Changes in the Match Industry in North China around 1937

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Abstract: The match industry in the North China region around 1937 showed significant differences. Before 1937, despite ups and downs, the match industry in North China was advancing in a wavering manner; after 1937, most Chinese-owned match factories were barely maintaining operations. Meanwhile, Japanese-owned match factories, although dominant and supported by the Japanese government, failed to stabilize match prices in the market. Especially in 1939-1940, the match prices in the Beijing-Tianjin area and the Shandong-Henan region surged dramatically, leading to a rapid market contraction, with Qingdao being particularly affected. The changes in the match industry in North China reflected the transformation of the modern social environment, with the pivotal year being 1937. The fluctuation of the match market and prices in North China was a clear manifestation of the overlapping changes and influences of social and natural environmental factors in the 1930s.

1. Introduction

In the North China region, which mainly includes Hebei, Shandong, and Henan, the match industry is one of the typical modern Chinese national industries in this area, exerting a significant influence on urban and rural handicrafts, family-based handicrafts, and manufacturing industries. Today, research on the modern Chinese match industry is already abundant^{[1][2][3]}, but it primarily utilizes Chinese materials. By combining domestic and international perspectives through materials such as the historical data of the National Committee of the Chinese People's Political Consultative Conference, the archives of the Second Historical Archives of China, the historical materials of the "National History Museum" in Taipei, China, materials from the Japan Institute of China's Issues, reports from the Ministry of Foreign Affairs' Trade Bureau, the diplomatic historical materials of the Ministry of Foreign Affairs, and documents from the United States' Historical Office of Foreign Relations, this study aims to comprehensively investigate the changes in the match industry in North China before and after 1937.

2. The State of the Match Industry in North China Before 1937

Matches were not originated in China but were introduced around the early years of the Guangxu period of the Qing Dynasty, and were referred to as "Western fire" by the Chinese. Before the 22nd

year of the Guangxu period, Chinese matches were monopolized by European goods, but they gradually declined after the invasion of Japanese goods. In the 15th year of the Guangxu period, the Juchang Company in Chongqing first produced matches, followed by the rise of Xi Chang in Hankou and Hefeng in Changsha. By the end of the Guangxu period, there were a total of 14 match factories established in the country, with 11 new ones created during the Xuantong period.

After the founding of the Republic of China, the match industry made rapid progress, with new factories springing up like mushrooms after a rain, not less than fifty. However, due to the lack of capital and small scale of each factory, fierce competition, and the dumping of cheap foreign goods, the business was not very profitable. Despite this, the match industry in North China had the opportunity for rapid development due to the sharp decline in the import of foreign goods at that time, which can be said to be the peak era of the match industry.^[4]

In the 1930s, the match factories in North China were mainly distributed in Shandong, Hebei, and the Beijing-Tianjin area, with more than forty factories. According to the location of the factories and the sales areas, the products of the factories in Tianjin, Beijing, and Hebei were mainly sold to Hebei, Shanxi, Henan, Gansu, and Qinghai; the products of the factories in Qingdao, Jinan, and Jining were mainly exported to Shandong, Henan, Anhui, Jiangsu, and Shaanxi.

Before 1937, there was the Japanese Match Federation in China and the Chinese National Match Federation, with members of each promoting the development of their respective industries through close contact. The Chinese National Match Federation sometimes used the privilege of guarantees from the Bank of China, and sometimes different railway freight treatment to actively carry out activities, such as treating the products of Japanese factories as first-class freight treatment and treating the products of Chinese factories as fourth-class freight treatment, using various means to exclude Japanese goods. At this time, the Chinese match industry was developing steadily, and the production and sales volume of some match factories in the Shandong-Henan region from 1932 to 1934 is a clear proof, as shown in the following Table 1.^[5]

However, competition within the industry led to overproduction, resulting in bankruptcies and suspensions of operations, unexpectedly triggering a crisis across the entire North China match industry. Hebei Province strictly monitored and collected the unified tax on its locally produced wooden matches. The match industry association of Hebei Province conducted a unified tax in Shandong Province, levying a tax of ten yuan to counter the low prices of Shandong's products, and hoped to extend it to the manufacturing factories in the Qingdao area. As a result, the matches from Hebei Province faced severe threats, and their sales channels were also reduced.^[6]

To prevent tax evasion on matches, the Nanjing National Government approved the establishment of the Match United Enterprise Society after a meeting of the three ministries of industry, foreign affairs, and finance. On the Japanese side, the Japanese industry association filed the case approved by the Kuomintang government with their embassy. The Japanese embassy made an informal statement that it could only acquiesce and was not convenient to officially announce it, in order to prevent other reactions within the country. The counselor of the Japanese embassy, Horiguchi, once privately told Zhang Xingu of Danhua Match Company that the Japanese government tacitly supported the United Enterprise Society and asked him to convey this to the Chinese government. The representative of the Japanese industry, Ueda, was a classmate of Horiguchi and could restrain his peers. The American-owned American Light Factory in Shanghai also expressed agreement but did not establish formal procedures, only having a written acknowledgment from the factory. In this way, the "China National Match Production and Sales United Enterprise Society" was established. The key points of the joint operation were twofold: First, based on the production and sales and unified tax records of each factory from 1932 to 1934, the ratio numbers of each factory were compiled, and the allocation of production, sales, and raw materials was based on this as a standard. The Japanese factories, due to tax evasion, had smaller

ratio numbers, and the Chinese factories negotiated to increase a considerable amount for them. Second, neither Chinese nor Japanese parties were allowed to establish new factories on Chinese territory, including concessions. If it was unavoidable, the production ratio of the new factory would be evenly distributed by the responsible party. Matches from within Japan were also not allowed to be sold in China. After about a year and a half of preparation, production began on March 1, 1937, according to the production ratio, and was gradually implemented under the unified sales of the United Enterprise Society, adjusting supply and demand and stabilizing sales prices, providing reasonably priced products for general consumers, and promoting the development of the affiliated factories.

Table 1: Production and Sales Volumes of Some Match Factories in the Shandong-Henan Region from 1932 to 1934

Factory Name	1932		1933		First Half of 1934	
	Production (boxes)	Sales (boxes)	Production (boxes)	Sales (boxes)	Production (boxes)	Sales (boxes)
Luxing	846.216	240	4525	5131	5129	3668
Changxing	6510	9089	16178.216	12590	5512	7382
Jinan Hongtai	12117	14183	2716.216	2318	486.416	932
Jinan Zhenye	28980	29348	33966	32482	18662	17570
Dongyi	14027.416	12856	10818.216	12390	8888.216	7329
Jiaodong	10410	10486	6343.216	6104	1810	1478
Jinan Zhenye	27972	27188	28442	27582	22382	20544
Ludong	18415.216	18526	11538.216	11089.416	10523	9200
Huabei	47655.216	47536	54627	54887.416	37478	37404.416
Qingdao Zhenye	24808	24850	28038	27586	21324	21026
Donghua	11097.216	9757	3247.216	2431	86	138
Huasheng	1946.416	2980	5334.416	5362	2450	1670
Xinchang	19820.416	20386	20172.216	20160	13910	12738
Xingye	16361.416	16278	14574	14592	9216	7374
Shandong	22397	17856	18666	16884	13636	12000
Qingdao	43339.216	36795	37743.216	32600	26006	20351
Dongyuan	12781.416	13226	13093.216	12848	7026.216	5800
Huifeng	4990	4932	2939.216	2866	1267.216	1246
Haibin	1928.416	1828	2043.416	2103	1438.216	1251
Zhongya	594	508	1385	864.216	1002	1180
Fulai	344	292	658	537	439.416	428
Luxi	1712.216	1892	3742.216	3688	1861.416	1770
Shandong-Henan Region Total	371595	365770.216	334641.216	323649.216	220663	201143.416

Note: The data in this table is transcribed directly from the original text.

Overall, before July 1937, the match industry in North China, despite its fluctuations, was developing steadily. In 1935, Mr. Gu Junzheng believed that organizing the Greater China Match Company could, on the one hand, avoid internal competition and, on the other hand, unite to compete with foreign goods. Although it was not implemented for long, it had already achieved considerable results, with the popularity of the Mei Li brand matches being a clear testament. According to statistics, there were more than 180 match factories in China at the time, of which 68 had joined the China National Match Industry Association, working together to face external challenges, hoping to find a way out through mutual assistance.^[7] The reactions of merchants and civilians also reflected this situation. From the end of 1936 to the first half of 1937, merchants Zhang Zhonghe and Jiang Yishan successively requested the Ministry of Industry's Commercial Department to establish the Lu Xi Match Factory, among others.^[8]

3. The State of the North China Match Industry After 1937

The outbreak of the Marco Polo Bridge Incident in 1937 led to a temporary suspension of the business of the United Enterprise Society, but the mainstream demand for control still existed, so the "China National Match Production and Sales United Enterprise Society" was re-established in March 1939.

The "China National Match Production and Sales United Enterprise Society" established its headquarters in Tianjin on March 1, 1939, and set up branch factories in Tianjin, Qingdao, and Shanghai, and subsidiary factories in Beijing, Botou Town, Jinan, and other places. Its purpose was to consider regulating production and sales to achieve balanced distribution and provide products to consumers. At the time of its establishment, there were 53 Chinese-owned factories, 8 Japanese-owned factories, and 1 jointly operated factory, totaling 62 factories. In terms of production volume, Chinese-owned factories accounted for about 75%, and Japanese-owned factories about 25%, with an annual production total of 840,000 boxes. The American-owned factory in Shanghai also joined the Shanghai branch factory and entered the scope of control. The chairman of the company was Chinese, with three executive directors, two Chinese and one Japanese, and four directors, two Chinese and two Japanese.

The price of the 95-entry phosphorus matches produced by the Tianjin factory was 49 yuan and 50 cents per box, and the price of the 95-entry phosphorus matches produced by the Qingdao factory was 48 yuan and 50 cents per box, serving as the standard price, with one box including 7,200 small boxes, that is, 720 packs. In addition to calculating according to the standard price, the factories in Beijing, Botou Town, and Jinan also had to calculate the transportation costs. Each box of 115-entry phosphorus matches was 5 yuan more than the standard price, and each box of 75-entry phosphorus matches was 1 yuan and 50 cents less, with various phosphorus matches classified into five levels, each level reducing by 30 cents. Due to the high cost of wooden case packaging, the phosphorus matches of various factories were packaged in woven bags or padded cloth bags and transported to wholesalers and retailers in remote areas by civilian ships or horse-drawn carriages. Compared with wooden cases, each box of padded cloth bags reduced by 1 yuan, 6 jiao, and 8 fen, and woven bags reduced by 1 yuan and 8 jiao and 6 fen. The safety second-grade matches produced by Qingdao and Tianjin, the flat box was 59 yuan, 6 jiao, and 6 fen per box, the medium box was 79 yuan, 4 jiao, and 2 fen, and the small box was 57 yuan, 9 jiao, and 1 fen. The above wholesale prices were based on the standard of 15% factory profit, and the profit of match wholesalers in various places was basically 3%. The basic annual production ratios of certain factories in the Beijing-Tianjin area and the Shandong-Henan region in 1939 are presented in Table 2 and Table 3.

On the surface, at this time, Chinese-owned match factories in North China held a dominant position, but in reality, Japan had already controlled the development of the match industry in this region. In the Beijing-Tianjin area, there were a total of 9 factories that joined the Japanese Match Production and Sales Cooperative, including 2 Japanese ones (Zhonghua Phosphorus Inch, Sanyou Foreign Firm). In the Shandong-Henan area, there were a total of 35, including 6 Japanese ones (Qingdao Match, Qilu, Qingdao Zhenye, Yifeng, Donghua, Shandong, etc.), and 1 Sino-Japanese joint venture (North China Match). In the Central China region, there were a total of 24, of which about 21 were Chinese-owned. At that time, the American diplomatic documents mentioned that by 1939, the Japanese had already obtained a monopoly on the trade of fish, livestock, eggs, and silkworm cocoons, in addition to which, the trade of matches, rice, wheat, and vegetables was also controlled by semi-official Japanese.^[9] In early 1943, the Japanese government agreed to "cooperate" between the Japanese Revitalization Co., Ltd., Match Co., Ltd., and the Greater China Match Co., Ltd., with the specific shareholding situation as shown in Table 4.

Table 2: Basic Annual Production Ratio of Some Factories in the Beijing-Tianjin Area in 1939

Factory Name	Location	Basic Annual Production Ratio
Dasheng	Tianjin	2762
Tianjin Danhua	Tianjin	36677
Beiyang	Tianjin	19541
Rongchang	Tianjin	2195
Beijing Danhua	Beijing	29859
Yonghua	Botou	20452
Housheng	Beijing	3240
Sanyou	Tianjin	14233
Zhonghua	Tianjin	41436
Total:179397		

Note: The data in this table is transcribed directly from the original text.

Table 3: Basic Annual Production Ratio of Some Factories in the Shandong-Henan Area in 1939

Factory Name	Location	Basic Annual Production Ratio	Factory Name	Location	Basic Annual Production Ratio
Changxing	Yantai	12743	Haibin	Jimo	1832
Jinan Hongtai	Jinan	8324	Guoji	Rizhao	720
Jinan Zhenye	Jinan	25691	Zhongya	Jimo	1800
Jiaodong	Chengchang	7130	Fulai	Niuqibu	1126
Jining Zhenye	Jining	23453	Daming	Jimo	720
LuDong	Qingdao	14081	Chichanghou	Ankou	2674
Huabei	Qingdao	42988	Yuhe	Heze	1800
Qingdao Zhenye	Qingdao	25032	Zhen Dong	Jin Kou	3130
Huasheng	Qingdao	4968	Huifeng	Weixian	3907
Xinchang	Qingdao	17842	Luxi	Linqing	3388
Xingye	Qingdao	13273	Lu'an	Jining	2543
Minghua	Cangkou	5481	Hengtai	Jinan	2228
Dongyuan	Jinan	10451	Qingdao	Qingdao	55987
Lu Xing	Jinan	3599	Shandong	Qingdao	38732
Jingye	Jiaoxian	4531	Huaxiang	Qingdao	13370
Yihua	Jinan	4354	Donghua	Qingdao	11312
Dongyi	Qingzhou	10536	Yifeng	Qingdao	4057
Dewei	Weihai	2922			
Total:388740					

Note: The data in this table is transcribed directly from the original text.

Table 4: Shareholders' Stock Adjustment Document^[10]

Shareholder	Number of Shares	Total Par Value of Shares	First Subscription Amount
Greater China Match Co., Ltd. Chairman: Chen Bofan	11940	5970000	2985000
Chen Bofan	10	5000	2500
Liu Nianyi	10	5000	2500
Chen Zhongdong	10	5000	2500
Ye Tiqing	10	5000	2500
Cen Dianxiang	10	5000	2500
Zhu Xuchang	10	5000	2500
Japan Revitalization Co., Ltd. President: Kodama Kenji	3980	1990000	995000
Bano Kiyoshi	10	5000	2500
Yasuno Kiichi	10	5000	2500
Taguchi Takeo	2200	1100000	550000
Nakamura Rokusuke	1200	600000	300000
Shimada Hidemi	600	300000	150000
Total		10000000	5000000

Note: The data in this table is transcribed directly from the original text.

Although the Japanese merchants had the power to control the entire match industry in North China, they did not maintain the stability of match prices. Taking 1939 as an example, the match prices in the Beijing-Tianjin area and the Shandong-Henan area rose continuously, as shown in Table 5.^[11]

Table 5: Changes in Match Prices in Some Cities in North China in 1939

Region		Type		March 11	August 31	November 17
Beijing-Tianjin Area	Tianjin	Sulfurized phosphorescent matches	A Grade 95-entry	49	53	62
			A Grade 75-entry	48	52	60
			B Grade 110-entry	54	60	69
		safety match	B Middle Box	74	83	92
			B Flat Box	59	64	70
			A Small Box	52	62	69
	Beijing	Sulfurized phosphorescent matches	A Grade 95-entry	50	54	63
			A Grade 75-entry	48	52	61
			B Grade 110-entry	55	61	70
		safety match	B Middle Box	75	84	92
			B Flat Box	60	64	78
			A Small Box	53	62	70
	Botou	Sulfurized phosphorescent matches	A Grade 95-entry	50	54	62
			A Grade 75-entry	48	52	61
			B Grade 110-entry	55	61	69
Shandong-Henan Region	Qingdao	Sulfurized phosphorescent matches	A Grade 95-entry	48	52	61
			A Grade 75-entry	47	51	59
			B Grade 110-entry	53	59	68
		safety match	B Middle Box	74	83	92
			B Flat Box	59	64	70
			A Small Box	52	62	69
	Jinan	Sulfurized phosphorescent matches	A Grade 95-entry	49	53	62
			A Grade 75-entry	48	52	60
			B Grade 110-entry	56	60	69

Note: The data in this table is transcribed directly from the original text.

4. Analysis of the Causes of Price Changes in the North China Match Industry

From 1918 to 1931 was the era of self-sufficiency for domestic matches. Prior to 1931, there was a surplus of imported matches, estimated to be between 3 million and 9 million boxes. Starting in 1932, due to national protection of domestic industries and increased tariffs, exports exceeded imports, marking a prosperous period for China's match industry.^[12] After 1937, the prices of matches in the North China region underwent changes, especially in 1939, when match prices continued to rise. The main reasons are as follows.

Firstly, after 1937, Japan controlled the main areas of North China and focused on developing its own economic strength, restricting the development of Chinese-owned factories. In terms of the "United Enterprise Society," after the fall of North China and Shanghai, the order within the society was jointly maintained by the Chinese and Japanese executive directors. The Japanese side was concerned that the dissolution of the society would lead to disruptions, such as the establishment of new factories or the importation of goods from Japan, which would damage their interests. Therefore, they preferred to retain the name of the society as a shield for themselves. This was a self-interested move, not an act of kindness towards the Chinese industry. As a result, Chinese factories managed to survive the difficulties without being annexed. However, due to the shortage of raw materials and limited sales channels, they could only barely maintain the minimum living standards of their workers until 1945^[13]. Taking the Beiyang Match Company as an example, in

July 1937, the puppet government officially established the Tianjin branch of the Match Production and Sales United Enterprise Society, and that year, the Beiyang Match Company was forced to stop production. In March 1938, the Japanese, led by Ichijo Kenji and in collusion with the Chinese Xu Lifeng, forcibly occupied the Beiyang Match Company and forced it to resume production. After a strong argument by all the directors and supervisors, it was reclaimed by the people and continued to operate that year. In the second half of the year, the "Tianjin Branch of the Match Production and Sales United Enterprise Society" continued to operate according to the old regulations by a Sino-Japanese joint venture, initially managing to maintain production. However, by 1940, the Beiyang Match Company was completely subject to the Japanese allocation of raw materials, reducing production, and Chinese factories no longer had the freedom to operate. Only Japanese-operated factories were unrestricted. Therefore, the Beiyang Match Company was unable to sustain itself, with only a dozen workers, and the factory's plight reached an extreme.^[14]

Secondly, affected by natural disasters, the prices of raw materials for making matches, such as paraffin, paper, and wood, rose, ultimately leading to an increase in match prices. There was a problem with the supply and demand of matches in the Beijing-Tianjin area, mainly due to floods in Tianjin, a major production area, which prevented local match factories from operating normally. As a result, there was a complete reliance on the products supplied by the "United Enterprise Society" from Qingdao. As various factories gradually resumed production, and the products from Qingdao had all been transported to inland areas, local factories began to supply the Beijing-Tianjin area. However, just as they were trying to adjust prices to cope with the general rise in prices, the high cost of raw materials made it impossible to profit from the wholesale price control issued by the society in June 1939, so they had to raise retail prices. The price increase of match raw materials is as follows:

Paraffin: 40 yuan per hundred jin in April 1939, rising to 130 yuan in 1940.

Yellow paper: 8 yuan per ream in June 1939, rising to 15 yuan in 1940.

Blue paper: 6 yuan per ream in June 1939, rising to 9 yuan in 1940.

Wood: Japanese-produced wood was 2800 yuan per hundred shi in 1939, rising to 4000 yuan in 1940. The poplar wood from Andong was 38 yuan per thousand bundles, while Japanese logs processed in Tianjin factories were 42 yuan per thousand bundles, with the poplar trees in the eastern Hebei region accounting for 65% of the production, and the price was higher than that of Japanese logs.

After the outbreak of the European war, the price of chemical drugs soared, and the general rise in commodity prices led to an increase in wages, severely affecting the profitability of factories. Although all factories resumed normal production after the flood, the production capacity did not return to the level before the flood, making it difficult to profit.

The market prices implemented by the United Enterprise Society on November 17, 1939, were: 62 yuan and 20 cents for a small box of 95-entry matches, 60 yuan and 70 cents for 75-entry, and 69 yuan and 20 cents for 115-entry.

The prices released in June 1939 were: 53 yuan and 50 cents for 95-entry, and the same proportionate increase for 75-entry and 115-entry, with all grades from first to fifth, and an increase of 8 yuan for large boxes.

The shortage of raw materials further pushed up the price of matches. The North China Economic News reported on April 14, 1940: Due to the difficulty in supplying industrial drugs and other axis wood, there is great concern about match production in Qingdao. The Qingdao United Enterprise Society implemented a significant price increase, which is expected to have a serious impact on all demand parties. The price was raised from the previous 120 yuan per ton to 180 yuan, and even at the new price, it is still difficult to obtain supplies from manufacturers, and the dissatisfaction of the demand parties is increasing. Looking at the match prices in other regions, Jinan at 165 yuan, Haizhou at 170 yuan, Xuzhou at 164 yuan, and Bengbu at 175 yuan, all 5 to 15 yuan lower than Qingdao's price, the market is also very cold. In the past, matches produced in Qingdao City were not only supplied to Shandong but also entered Shanxi, Anhui and other

provinces, becoming a necessity for the people. Therefore, people have called on the Qingdao United Enterprise Society to reconsider this significant price increase, believing it to be a wrong move.

5. Conclusion

The changes in the market and prices of the North China match industry around 1937 were the result of the combined impact of social and natural environmental factors in the 1930s. From the mid-1930s to the late 1930s, and even to the early 1940s, the shift in market share between Chinese and Japanese match factories in North China, and the rise in match prices, meant that the match industry in North China was affected by social conditions and natural conditions, reflecting the modern Chinese economy's deep impact by the political and social environment in the late 1930s. This development process involved extensive and far-reaching factors, and its results greatly changed the weight of Chinese and Japanese match factories in North China, the selling prices of matches, etc., making them more adaptable to the economic laws and basic requirements of the time and place. The key was the further penetration of Japanese merchants into the North China match industry, using administrative and military means to strengthen control over the match industry in North China, which concentrated on reflecting the changes in social conditions, political patterns, and natural conditions in North China in the 1930s and 1940s.

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