

total world's output of 2,346,941 tons, though in 1904 of 1,938,847 tons we accounted for 62.1 per cent.

Since the war our proportion has still further fallen away. In 1921, indeed, it dropped to 35.4 per cent.; but that year was exceptional in its display of shipbuilding activity abroad, especially in coast ports of the United States and of the British Dominions. In 1925 we had recovered to a position represented by 49.4 per cent., or about half of the world's production, *i.e.* 1,084,633 tons, out of a total of 2,193,404 tons, including vessels built on the Great Lakes. In 1926, out of a total tonnage of 1,674,927 tons, our output fell to 639,568 tons, while that of Germany decreased by 225,826 tons below her output in the previous year. These figures \* show that the foreigner is gradually learning to build for himself, though, thanks in part to his helping us with low-priced materials, we were able, until after the war, to build cheaper than he and give him better bargains in new tonnage than he could find elsewhere.

The geographical positions of our chief shipbuilding centres are sharply defined. The North-east Coast, comprising the Tyne, Wear, Tees, the Hartlepoons and the Humber, has always been a centre of shipbuilding activity from the earliest times, and has taken the first place in output, followed in succession by the Clyde, Belfast, Barrow, the Thames and some minor districts such as Burntisland and Dundee. The Tyne, which claims to rank as the cradle of the shipbuilding industry, still holds the first place alike as to volume of tonnage, its variety and importance. There are 115 building berths in its shipyards. From its banks have been launched battleships, armoured cruisers and the swiftest destroyers for our own and other nations, besides some of the largest cargo and intermediate passenger steamers afloat for the mercantile marine.

\* See Appendix.