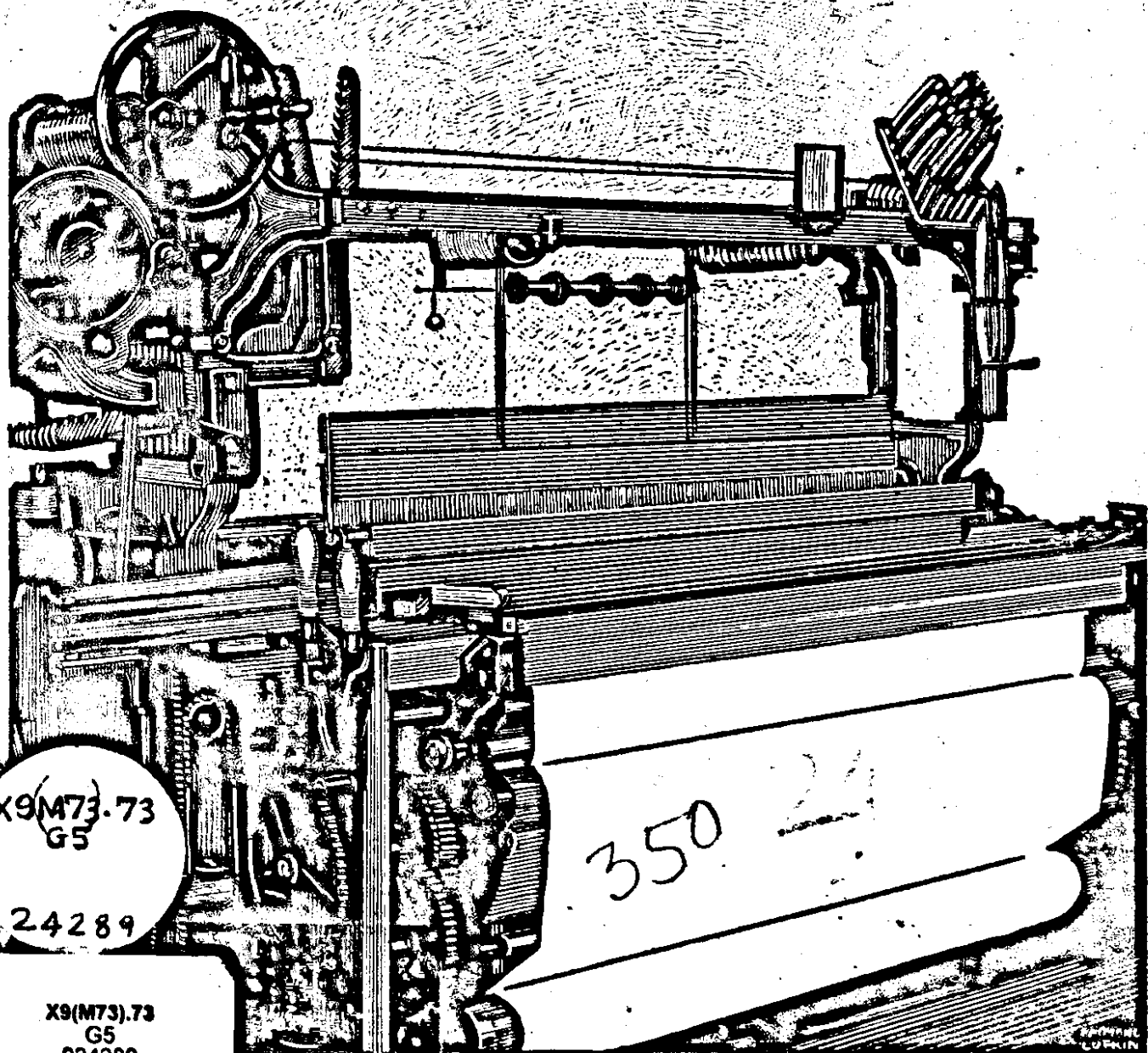


PRODUCTION *and* DISTRIBUTION OF SILK *and* RAYON BROAD GOODS



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THE TEXTILE FOUNDATION INC.

and
THE NATIONAL FEDERATION of TEXTILES INC.

ALVIN T. COPLAND

W. HOMER TURNER

This is Copy
Number 2879
of the
First Edition

PRODUCTION *and* DISTRIBUTION
of
SILK *and* RAYON BROAD GOODS

Prepared by
Melvin T. Copeland
W. Homer Turner



For
THE TEXTILE FOUNDATION, Inc.
THE NATIONAL FEDERATION OF TEXTILES, Inc.

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TEN EAST FORTIETH STREET
NEW YORK, N. Y.

Foreword

THE ECONOMIC position of the silk and rayon industry led The Silk Association of America, Inc., predecessor of The National Federation of Textiles, Inc., to submit research suggestions to The Textile Foundation, Inc. The Foundation, recognizing the value of these suggestions, asked the Association to appoint a committee for the development of a study of production and distribution problems. Work on this study subsequently was begun through funds obtained from The Textile Foundation, Inc., and by special contributions from individuals and corporations.

With the selection of Dr. Melvin T. Copeland of the Harvard University Graduate School of Business Administration as consultant, the collection of data and the assimilation of facts and opinions from the trade was started by the Planning and Research Bureau of the present National Federation of Textiles, Inc. As the collection of material neared completion, there occurred, in 1933, economic changes of a momentous nature followed by the preparation and installation of the various textile codes pursuant to the National Industrial Recovery Act. Because of the significance of these developments and their immediate influence upon both production and distribution problems, publication of the study was delayed until the present.

This study embraces the most economically important segment of the silk and rayon branches of the textile industry—that of broad fabrics made in whole or in part of silk and/or rayon. Under the production section is included the weaving of fabrics and, under the distribution section, the study deals with the movement of these woven goods from producing mills and converters to trade and consumer outlets. Although incidental attention is given to merchandising and selling problems, including such matters as price policies, styling, methods of selling, etc., no attempt is made to concentrate the study on any one of these points. It was felt that the unsatisfactory conditions prevailing in the silk and rayon industry best could be analyzed by a broad consideration of all the problems of the industry, which would indicate the desirable future course of economic study and marketing research.

The response of the industry to requests for data was gratifying; more than 5,000 special and thousands of general questionnaires were filled out; 300 interviews were held and tabulated figures represent at least 85 per cent of the industry. The data in most instances embrace operators interested in silk and rayon broad goods who now report to the Silk Textile and to the Cotton Textile Codes.

In the early stages of preparatory work, aid was given by a committee representing the various classes of manufacturers and distributors. George G. Sommaripa, formerly

of The Silk Association of America, was responsible for the partial origination of the material. W. Homer Turner, research director of The National Federation of Textiles, Inc., and formerly economic and industrial editor of the Encyclopaedia Britannica, was editor-in-chief. Frank J. G. Duck, also of the Federation staff and formerly an editor with the McGraw-Hill Publishing Co., was associate editor.

The preparation of a study of this nature obviously has required the assistance of numerous persons and, for the generous cooperation afforded, the editors and the Federation are grateful.

PETER VAN HORN, President
The National Federation of Textiles, Inc.

January 1, 1935

Subscribers to the Survey Fund

A LARGE share of the financial assistance required for the execution of the task of gathering and interpreting the survey data was contributed through a special grant of The Textile Foundation. But the generous support of the following organizations and individuals enabled the work to be undertaken on a scale and with a thoroughness that otherwise would not have been possible. The thanks of the entire industry should be extended to those who, with The Textile Foundation, made this survey possible.

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Glossary of Special Terms

BROAD GOODS. This embraces all *woven* fabrics 24 inches and over in width. It includes tie fabrics 24 inches wide and excludes the so-called narrow fabrics, such as ribbons and hat bands

COMMISSION WEAVERS. Those who weave goods on commission as a usual practice. Commission weavers seldom, if ever, purchase raw stocks on their own account

CONVERTERS. Those whose business, largely, is the buying of cloth in the greige (unfinished) and finishing or "converting" it (dyeing, printing, etc.). Converters may buy raw materials and have the goods woven by commission weavers

INTEGRATION. The combination of the related functions of production, merchandising and selling (marketing), under the control of a single business organization

MARKETING. Activities concerned with product planning, selection of distribution channels, sales solicitation and promotion, advertising and pricing, to effect the distribution of goods and services from manufacturer to consumer

RAYON. A general term applied to all synthetic goods whether made by the viscose, acetate, nitrocellulose or cuprammonium process

STOCK-CARRYING MILLS. Regular mills which buy their own raw material and weave their own cloth to fill bona fide orders or for their own account. A stock-carrying mill may or may not finish its own cloth

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