

**RETAIL TRADE
ASSOCIATIONS**

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RETAIL TRADE ASSOCIATIONS

A NEW FORM OF MONOPOLIST
ORGANISATION IN BRITAIN

A Report to the Fabian Society

by
HERMANN LEVY

KEGAN PAUL, TRENCH, TRUBNER & CO., LTD.
BROADWAY HOUSE: 68-74 CARTER LANE
LONDON E.C.4

First published 1942
Reprinted 1944

Printed in Great Britain by
Lowe and Brydone Printers Limited, London, N.W.10

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FOREWORD

EARLY in the war it became apparent that the trend towards monopoly in industry and trade, which had been the predominant economic development in the period between wars, was being strongly intensified. The conditions of war themselves immensely foster this tendency, and these external conditions have been actively reinforced by Government action. To anyone looking ahead at the beginning of the war, indeed, it was clear that here was probably *the* fundamental economic problem of the 1940's. If this trend continued, how could the public interest be protected against the growing power of the monopolies?

When Professor Hermann Levy, whose work on industrial combination both in this country and in Europe needs no introduction, approached the Fabian Society and suggested an investigation of the developments of combination in the distributive trades, with special emphasis upon wartime development, we therefore eagerly welcomed the proposal. The facts which Professor Levy has discovered show with extreme clarity the way in which retail distribution—hitherto believed to be the last stronghold of free competition—is moving. They show with even greater clarity the urgent need for a public policy to cope with this trend, and to guide it into channels in which the maximum efficiency will be maintained without danger of exploitation of the consumer. The Fabian Society sponsors this book in the hope that it will provide the factual basis indispensable for the formulation of a sound and progressive policy, though neither the Society nor its members are responsible for the opinions expressed.

The Society is indebted to Mr. R. W. B. Clarke for help and advice in the preparation of the manuscript for publication.

JOHN PARKER,
General Secretary,
Fabian Society.

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LONDON, S.W.1

AUTHOR'S PREFACE

WHEN in 1909 the first edition of my investigation into British cartels and trusts was published, the mere existence of so many quasi-monopolist organisations in the industries of this country came as a surprise to many of its readers. In the meantime one has become accustomed to regard industrial combination as the regular organisational feature of British industry. In those days it was never assumed that anything like industrial combination could become the characteristic structure of retail trade as well. Just as it was supposed formerly that "free trade" would make industrial combination impossible in this country, so nowadays the argument is frequently heard that the great multiplicity of trading outlets will never allow quasi-monopolist retail trade organisations to flourish for any length of time. Yet cartels in this country developed in spite of free trade, and retail trade associations with the unconcealed aim of restricting competition are to be found in every corner of trade activity in spite of the large numbers of single traders. But, again, similarly to industrial combinations in former days, retail trade associations have been fortunate to remain in the background of publicity. No such word as "combination" has yet been introduced to characterise their objects. The term "association"—unlike the terms "cartel", "syndicate" or "trust"—is applied to sporting, charitable and political organisations, and does not itself indicate that a new form of restricted competition is rapidly developing, and that this new development is changing the entire structure of British retail trade. To the description and analysis of these changes the present book has been devoted. It may claim to be the first in the field.

There have been many valuable contributions to partial aspects of the matter, in the form of books and treatises, and in particular a series of most instructive and illuminating articles in the *Manchester Guardian*, of some years ago, may be mentioned as having been of greatest service. My main sources of material, however, have been, as in my former studies on cartels and trusts, the various trade journals which week by week, or month by month, throw the most instructive light on all matters concerning retail trade problems. From the elaborate list of trade journals used,

which is appended to this book, the reader may gather the wide scope of inquiry which confronted the author in his task of drawing generalisations from a study of almost all important—and also from many less important or less conspicuous—branches of retail trade. It is regrettable that this valuable source of information is so little recognised by British economists. Yet it is clear that argumentation on theoretical lines is worthless unless it is fully backed by unassailable facts. These facts are drawn from the actual life and policy of retail trade associations. Without these facts, discussion might even be misleading and dangerous to the community. At the same time, the author has striven to avoid accepting what are merely the views and opinions of the so-called "practical men" in the trades. The problem transcends the sometimes very narrow, and necessarily opportunist, outlook of the so-called authorities of single trades. It touches, on the contrary, many aspects on which the State must in the last resort decide. The private outlook of trade representatives—experts as they may be—must be separated from the broader horizon of public interest and utility.

It is highly satisfactory that the President of the Board of Trade, after consultation with the Ministers of Labour and Food, appointed in June 1941 a Committee to examine the present problems of the retail trade in goods other than food. The present book was finished by the end of that month. In view of the coming findings of the new Committee the author may express the hope that his attempt to describe and analyse the main development and objectives of retail trade associations, past and present, may be of some value when the problem of the attitude of the State towards these trade corporations of to-morrow will demand a solution. How far the author, who is indebted to the Fabian Society for most helpful assistance, has been able to prepare the road for such final decisions it is for the readers of this book to judge.

HERMANN LEVY.

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The Times.
The Evening Standard.
The Evening News.
Grocery.
Grocers' Gazette.
The Metal Industry.
Iron and Steel.
Iron and Coal Trades Review.
The Machinery Market.
Electrical Trading and Radio Marketing.
Confectionery Journal.
Confectionery News.
Tobacco.
The Cigar and Tobacco World.
The Pharmaceutical Journal.
The British Pharmacist.
The Retail Chemist.
The Chemist and Druggist.
The Baker and Confectioner.
The National Association Review (of Master Bakers, etc.).
Milling.
Hairdresser and Beauty Trade.
Leather Goods.
The Leather World.
Meat Trades Journal.
The Milk Industry.
Games and Toys.
The Perfumeries and Essential Oil Record.
The Shoe and Leather News.
Textile Weekly.
Petroleum Times.
Motor Commerce.
Conrad's Jahrbuecher.
Store.
Politica.
Statist.
Harper's Magazine.
The Economic Journal.
Fabian Quarterly.

LIST OF RETAIL TRADE ASSOCIATIONS AND RELATED ASSOCIATIONS

(In the order of appearance in the book)¹

The Retail Distributors' Association.
The London Coal Ring.
Kohlenkontor (Germany).
Börsenverein Deutscher Buchhaendler (Germany).
The Booksellers' Association.
Associated Booksellers of Great Britain and Ireland.
The Publishers' Association of Great Britain and Ireland.
British Publishers' Guild.
Manchester Grocers' Association.
The Birmingham and Midland Counties Grocers' Protection and Benevolent Association.
Traders' Defence Association.
The Federation of Grocers' Associations of the U.K.
Saddlers and Harnessers' Proprietary Articles Association.
Proprietary Articles' Trade Association.
The U.K. Tobacco Dealers' Alliance.
The Coffee Stall Keepers' Protection Association.
The Society of Motor Manufacturers and Traders.
The National Federation of Grocers' and Provision Dealers' Associations.
The Wholesale Grocers' Distributors Association.
The North of England Wholesale Grocers' Association.
The National Association of Produce Merchants.
The Grocers' Proprietary Articles Council.
The National Federation of Retail Fruiterers, Florists and Fishmongers.
The Retail Fruiterers' and Florists' Association.
The National Federation of Fruit and Potatoes Trades.
The Motor Car Association.
National Federation of Iron, Steel and Scrap Merchants.
Radio Manufacturers Association.
The British Electric and Allied Manufacturing Association.
The Electric Lamp Manufacturers' Association.
The Electric Light Fittings' Association.
The Domestic Electric Refrigerator Association.
The Electric Water Heater Manufacturing Association.
The Electrical Wholesalers Association.
The Electrical Contractors' Association.
National Association of Electrical Dealers.
Ironmongers' Federated Association.
Radio Wholesalers Federation.
National Association of Radio Retailers.
Electrical Contractors' Association.

¹ The list includes associations which no longer exist or have altered their name.

Wireless Retailers' Association.
Radio and Television Dealers' Federation.
The National Association of Electrical Retailers.
The Radio and Television Dealers' Federation.
The White List.
The Motor Trade Association.
British Cycle and Motor Cycle Manufacturers' and Traders' Union.
Cycle Trade Union.
National Association of Cycle and Motor Cycle Traders.
Stationers' Association of Great Britain and Ireland.
The Scottish Tobacco Trade Federation.
Manufacturing Confectioners' Alliance.
National Union of Retail Confectioners.
British Federation of Wholesale Confectioners.
The National Association of Goldsmiths.
The London Jewellers' Association.
The Birmingham Jewellers' and Silversmiths' Association.
The British Clock Manufacturers' Association.
National Council of the Jewellery and Allied Trades' Associations.
The Multiple Shop Federation.
The National Association of Outfitters.
National Association of Credit Drapers.
National Federation of Ironmongers.
National Pharmaceutical Union.
Chemists' Defence Association.
National Federation of Retail Newsagents, Booksellers and Stationers.
National Union of Retail Tobacconists.
Tobacco Trade Association.
Independent Tobacco Trade Association.
National Drug and Toilet Goods Association.
National Cash Grocers' Association.
The National Federation of Off-Licence Holders.
The Hotels and Restaurants Association.
Associated Motion Picture Advertisers (U.S.A.).
Window Display Advertising Association (U.S.A.).
Paper Makers' Advertising Club (U.S.A.).
Agricultural Publishers' Association (U.S.A.).
International Alliance of Bill Posters for the U.S. and Canada.
Theatre Advertising Association (U.S.A.).
American Association of Advertising Agencies (U.S.A.).
Association of National Advertisers (U.S.A.).
National Association of Funeral Directors.
National Federation of Meat Traders' Associations.
National Federation of Fresh Meat Wholesalers.
British Association of Meat Wholesalers.
Sports Retailers' Association.
Federation of Sports Goods Distributors.
Federation of British Manufacturers of Sports and Games Equipment.
The Motor Agents' Association.
Hairdressers' Wholesale Association.
Retail Hairdressers' Federation.
The London and Provincial Wholesale Newsagents' Association.

Liverpool and District Sweet Retailers' Association.
Confectioners', Tobacconists' and Newsagents' Alliance.
Manchester Bakers' Association.
Liverpool and District Wholesale Confectioners' Association.
Midland and Birmingham Tobacconists' Association.
The Periodical Press and Weekly Newspapers Proprietors' Association.
Newspaper Proprietors' Association.
Building Societies' Association.
Chemists' Friends Scheme.
The Coffin Furniture Manufacturers' Association.
Mersey District Funeral Directors' Association.
Birmingham Funeral Directors' Guild.
Potteries and District Funeral Furnishers' Association.
Bournemouth and District Undertakers' Association.
Burnley Funeral Undertakers' Association.
The National Association of Leather and Grindery Merchants.
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The London and Metropolitan Grocers' Association.
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