NATIONAL RECOVERY ADMINISTRATION

DIVISION OF REVIEW

E V I D E N C E S T U D Y

NO. 24

OF

THE MEN'S CLOTHING INDUSTRY

Prepared by

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PRELIMINARY DRAFT

(NOT FOR RELEASE: FOR USE IN DIVISION ONLY)

THE EVIDENCE STUDY SERIES

The EVIDENCE STUDIES were originally planned as a means of gathering evidence bearing upon various legal issues which arose under the National Industrial Recovery Act.

These studies have value quite aside from the use for which they were originally intended. Accordingly, they are now made available for confidential use within the Division of Review, and for inclusion in Code Histories.

The full list of the Evidence Studies is as follows:

1. Automobile Manufacturing Ind.
2. Boot and Shoe Mfg. Ind.
3. Bottled Soft Drink Ind.
4. Builders' Supplies Ind.
5. Chemical Mfg. Ind.
6. Cigar Mfg. Industry
7. Construction Industry
8. Cotton Garment Industry
9. Dress Mfg. Ind.
10. Electrical Contracting Ind.
11. Electrical Mfg. Ind.
12. Fab. Metal Prod. Mfg., etc.
13. Fishery Industry
14. Furniture Mfg. Ind.
15. General Contractors Ind.
16. Graphic Arts Ind.
17. Gray Iron Foundry Ind.
18. Hosiery Ind.
19. Infant's & Children's Wear Ind.
20. Iron and Steel Ind.
21. Leather
22. Lumber & Timber Prod. Ind.
23. Mason Contractors Industry
24. Men's Clothing Industry
25. Motion Picture Industry
26. Motor Bus Mfg. Industry (Dropped)
27. Needlework Ind. of Puerto Rico
28. Painting & Paperhanging & Decorating
29. Photo Engraving Industry
30. Plumbing Contracting Industry
31. Retail Food (See No. 42)
32. Retail Lumber Industry
33. Retail Solid Fuel (Dropped)
34. Retail Trade Industry
35. Rubber Mfg. Ind.
36. Rubber Tire Mfg. Ind.
37. Silk Textile Ind.
38. Structural Clay Products Ind.
39. Throwing Industry
40. Trucking Industry
41. Waste Materials Ind.
42. Wholesale & Retail Food Ind. (See No. 31)
43. Wholesale Fresh Fruit & Veg.

In addition to the studies brought to completion, certain materials have been assembled for other industries. These MATERIALS are included in the series and are also made available for confidential use within the Division of Review and for inclusion in Code Histories, as follows:

44. Wool Textile Industry
45. Automotive Parts & Equip. Ind.
46. Baking Industry
47. Canning Industry
48. Coat and Suit Ind.
49. Household Goods & Storage, etc.(Dropped)
50. Motor Vehicle Retailing Trade Ind.
51. Retail Tire & Battery Trade Ind.
52. Ship & Boat Bldg. & Repairing Ind.
53. Wholesaling or Distributing Trade

L. C. Marshall
Director, Division of Review

CONTENTS

CONTENTS
(Cont'd)

TABLES

TABLES
(Cont'd)

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EVIDENCE CONCERNING THE MEN'S CLOTHING INDUSTRY

CHAPTER I

THE NATURE OF THE INDUSTRY

Number of Establishments

The Code Authority for the Men's Clothing Industry has estimated that there were 3,225 establishments in the Industry during the spring season of 1935. This represents an increase of slightly more than 1,000 establishments over 1933, but falls 466 short of the 1929 total of 3,691.

TABLE I

NUMBER OF ESTABLISHMENTS IN THE UNITED STATES

Year	Number of Establishments a/
1929	3,691
1931	2,945
1933 b/	2,219
1935	3,225

Source: Census of Manufacturers, "Men's Clothing;" 1935 figure estimated by the Code Authority for Men's Clothing Industry.

a/ Regular factories and contract shops combined.

b/ Because of changes in the classification of cotton garments, 1933 figures are not comparable with those for previous years.

The number and percentage distribution of productive units by states are given in Table II.

TABLE II

NUMBER AND PER CENT OF PRODUCTIVE UNITS IN SPECIFIED STATES a/

State	1929		1931		1935	
	Number	Per cent	Number	Per cent	Number	Per cent
United States Total	3,691	100.0	2,945	100.0	3,225	100.0
California	88	2.4	64	2.2	105	3.3
Colorado	5	0.1	5	0.2	3	0.1
Connecticut	30	0.8	16	0.5	7	0.2
Georgia	7	0.2	8	0.3	5	0.2
Illinois	319	8.6	204	6.9	269	8.3
Indiana	25	0.7	18	0.6	5	0.2
Kentucky	24	0.7	18	0.6	10	0.3
Louisiana	17	0.5	19	0.6	17	0.5
Maine	9	0.2	7	0.2	5	0.2
Maryland	217	5.9	257	8.7	329	10.2
Massachusetts	161	4.4	146	5.0	117	3.6
Michigan	22	0.6	13	0.4	10	0.3
Minnesota	46	1.2	40	1.4	19	0.6
Missouri	72	2.0	65	2.2	27	0.8
New Hampshire	5	0.1	3	0.1	2	0.1
New Jersey	168	4.6	145	4.9	190	5.9
New York	1,817	49.2	1,404	47.8	1,622	50.2
Ohio	130	3.5	102	3.5	97	3.0
Pennsylvania	384	10.4	317	10.7	336	10.4
Tennessee	11	0.3	10	0.3	7	0.2
Texas	13	0.5	11	0.4	3	0.1
Virginia	17	0.5	11	0.4	5	0.2
Washington	9	0.2	7	0.2	3	0.1
Wisconsin	37	1.0	28	1.0	19	0.6
Other States	53	1.4	27	0.9	13	0.4

Source: Census of Manufactures, "Men's Clothing;" 1935 figures estimated by the Code Authority for Men's Clothing Industry.

a/ Regular factories and contract shops combined.

Number of Members

A classification of members according to value or volume of production, or a classification by members is not available now, and could only be supplied by the Code Authority after considerable work. Nevertheless, H. K. Herwitz of the Code Authority has estimated that no one member of the Industry produces more than 3 per cent of the volume of the Industry. A study by the same individual likewise reveals that a list of the 50 largest producers would range down to include those firms which produce .3 of 1 per cent of the industry volume.

Production by States

The per cent of garments cut and made up in the various states is a good index of the importance of the Industry in relation to interstate commerce. The per cent of garments cut is given by principal states, for 1934, in the following table:

TABLE III

PER CENT OF GARMENTS CUT, BY PRINCIPAL STATES, 1934

State	Per cent
United States Total	100.0
California	0.4
Georgia	1.2
Illinois	9.1
Indiana	0.9
Kentucky	0.7
Louisiana	1.5
Maryland	7.2
Massachusetts	4.1
Minnesota	0.3
Missouri	2.1
New Jersey	0.7
New York State	46.2
Ohio	11.2
Oregon	0.1
Pennsylvania	11.7
Puerto Rico	0.1
Tennessee	1.2
Virginia	0.7
Wisconsin	0.4
Other States	0.2

Source: Code Authority for Men's Clothing Industry.

Capital Investment

An estimate of capital investment in the Men's Clothing Industry is not available. The Industry is so widely scattered and composed of so many small establishments that well informed members of the Industry refuse to hazard a guess as to capital investment. Bearing indirectly upon this point is Table IV which shows net worth and sales of 229 identical clothing manufacturers for the years 1932, 1933 and 1934.

TABLE IV

NET WORTH AND NET SALES
(229 Identical Concerns)

Year	Net Worth a/	Net Sales
1932	$14,026,270	$40,992,104
1933	15,089,441	51,918,217
1934	15,645,815	62,799,692

Source: Dun and Bradstreet, Inc., "A Profit and Loss Survey of Clothing Manufacturers."

a/ As of end of year.

Failures

The Research Department of the National Credit Office, New York City in its "Business Survey of 1932" presents a record of embarrassments, including bankruptcies, assignments and trustees, for the Men's Clothing Manufacturing Industry. This study covers the years 1929 - 1932, inclusive.

The number of embarrassments has increased steadily during the period studied, while the liabilities involved increased sharply from 1929 to 1930, receded somewhat in 1931, only to return to the 1930 level in 1932. More recent data relative to failures are not available except for the year 1934, for which Dun and Bradstreet report 26 failures (amount of liabilities unknown).

TABLE V

EMBARRASSMENTS AND LIABILITIES

Period	Number of Embarrassments	Amount of Liabilities (In thousands)
1929		
1st quarter	15	$ 722
2nd quarter	11	941
3rd quarter	8	217
4th quarter	24	1,600
Total	58	$3,480
1930		
1st quarter	49	$3,727
2nd quarter	32	2,175
3rd quarter	17	590
4th quarter	34	2,018
Total	132	$8,510
1931		
1st quarter	35	$1,890
2nd quarter	24	827
3rd quarter	33	1,730
4th quarter	61	2,555
Total	153	$7,002
1932		
1st quarter	56	$2,754
2nd quarter	39	2,992
3rd quarter	32	1,742
4th quarter	41	967
Total	168	$8,455

Source: National Credit Office, New York City, Business Survey of 1932, "Men's Clothing Manufacturing Industry."

Value and Volume of Production

The principal products produced under the Men's Clothing Industry Code are: men's suits, wholly or partly wool, mohair and linen; men's separate trousers; men's overcoats and topcoats; men's odd coats; boys' suits, wool, cotton, etc. boys' separate pants; boys' overcoats; boys' mackinaws, reefers and light coats; and uniforms.

The volume and value of production in the years 1929, 1931, 1933, and 1934 broken down to cover all principal products, is shown in Table VI. It is noted that there was a steady decline in number and value of garments manufactured from 1929 through 1933, but that 1934 witnessed increases in volume and value somewhat in excess of 1933.

Uniforms are not included in Table VI totals. The number of uniforms produced as reported in the 1933 Census of Manufacturers was 635,008 with a value of $8,499,743. The Code Authority for the Men's Clothing Industry advises that 1934 production of uniforms was about the same as 1933, and that the value at 1934 prices would be from $9,500,000 to $10,000,000.

The total value of the products for 1934 as shown in Table VI was estimated by the Code Authority for the Men's Clothing Industry, using the 1933 average unit values as reported in the Census of Manufactures, suitably adjusted.

TABLE VI

TOTAL VALUE AND VOLUME OF PRODUCTION a/

Kind of Product	1929		1931		1933		1934	
	Number of Garments	Value of Product	Number of Garments	Value of Product	Number of Garments	Value of Product	Number of Garments	Value of Product
Total	76,795	$781,871	61,563	$481,348	36,399	$347,807	48,171	$397,876
Men's Suits:								
Wholly or partly wool	23,518	457,209	17,533	290,340	15,645	229,692	15,756	255,424
Cotton, mohair, linen	- -	- -	- -	- -	- -	- -	1,704	10,714
Men's separate trousers:								
Wool	24,337	82,824	18,523	52,096	9,188	34,782	7,024	17,700
Cotton, etc.	- -	- -	- -	- -	- -	- -	9,240	10,395
Men's overcoats and topcoats	7,322	140,063	4,526	71,620	4,231	58,885	4,095	59,195
Men's odd coats	1,258	33,079	826	20,389	470	12,223	486	4,474
Boys' suits:								
Wool	5,566	35,842	6,134	22,535	2,506	12,933	2,824	16,232
Cotton, etc.	- -	- -	- -	- -	- -	- -	2,848	3,009
Boys' separate pants:								
Wool	12,847	18,982	12,806	17,619	3,705	3,803	2,961	3,509
Cotton, etc.	- -	- -	- -	- -	- -	- -	- -	4,766
Boys' overcoats	1,947	13,552	1,210	6,749	654	3,484	713	4,377
Boys' mackinaws, reefers and light coats	- -	- -	- -	- -	- -	- -	520	3,192

Source: Census of Manufactures, "Men's Clothing;" 1934 data from the Code Authority for Men's Clothing Industry.

a/ Includes regular factories and contract shops.

Competing Products

Custom-tailored suits compete with the products under jurisdiction of the Men's Clothing Industry Code. The Cotton Garment Industry Code overlaps with the Men's Clothing Industry Code in the cases of wash suits and pants.

Use as an Intermediate Good

None of the products of this Industry is used by other industries as an intermediate good.

General Information

For further evidence bearing upon the interstate character of the Men's Clothing Industry attention is called to the five exhibits in the appendix, the titles of which are self-explanatory.

CHAPTER II

LABOR STATISTICS

Employment

Table VII shows the average number of wage earners by states for the years 1929, 1931 and 1933, and for the last six months of 1934. The fluctuation in the yearly averages ranges from a low of 119,253 employees in 1933 to the high for the four-year period of 149,868 employees in 1929.

TABLE VII

AVERAGE NUMBER OF WAGE EARNERS, BY PRINCIPAL STATES a/

State	1929	1931	1933 b/	1934
U. S. Total	149,868	121,964	119,253	130,317 c/
Illinois	20,304	15,205	13,448	
Maryland	10,007	9,642	9,482	
Massachusetts	5,551	5,345	5,143	
New Jersey	7,910	7,559	8,508	
New York	47,210	34,805	33,086	
Ohio	13,215	11,536	10,714	
Pennsylvania	18,473	16,274	17,116	
Other States	27,198	21,600	21,726	

Source: Census of Manufactures, "Men's Clothing"; 1934 figure from the Code Authority for Men's Clothing Industry.

a/ Employees included: skilled and unskilled wage earners of all classes. Re[illegible] factories and contract shops combined.

b/ Because of changes in the Census classification, 1933 figures are not comparable with those for previous years.

c/ Code Authority figure representing average of six months, July - December, 1934.

TABLE VIII

EMPLOYMENT, MAN-HOURS AND EARNINGS, BY MARKET AREAS
LAST SIX MONTHS, 1934

	Number Employed		Average Hourly Earnings	Average Weekly Man-Hours	Average Weekly Earnings	Average Weekly Payroll a/
	Average Number	Per cent				
Ten Important Cities						
Baltimore	7,525	5.7	56.2¢	26.2	$14.72	$ 109,340
Boston	2,476	1.9	71.3	26.2	18.68	46,252
Buffalo	1,433	1.1	62.8	26.9	16.89	24,203
Chicago	16,290	12.5	76.0	24.2	18.38	307,355
Cincinnati	6,255	4.8	65.3	27.0	17.63	110,276
Cleveland	5,082	3.9	70.5	30.0	21.15	107,484
New York	29,192	22.4	75.2	26.3	19.78	577,418
Philadelphia	10,816	8.3	70.6	25.6	18.07	195,445
Rochester	9,253	7.1	67.0	22.3	14.94	138,240
St. Louis	1,894	1.1	62.1	27.9	17.33	29,357
Total Cities	89,919	69.0	71.2	25.7	18.30	1,645,518
Balance of Cities over 100,000						
Los Angeles	782	0.6	72.6	28.2	20.47	16,008
Milwaukee	782	0.6	66.4	30.3	20.12	15,734
Minneapolis	261	0.2	63.2	32.1	20.29	5,296
Newark, N. J.	1,693	1.3	70.8	27.1	19.19	32,489
Portland, Oregon	261	0.2	53.5	24.9	13.32	3,477
St. Paul	261	0.2	64.4	29.4	18.93	4,941
San Francisco	261	0.2	65.1	30.6	19.92	5,199
All Other Cities b/	6,991	5.9	53.3	26.8	14.26	128,391
Total Cities	13,292	10.2	58.1	27.3	15.86	210,811
Total 10 important cities	89,919	69.0	71.2	25.7	18.30	1,645,518
Total other cities over 100,000	13,292	10.2	58.1	27.3	15.86	210,811
Total cities from 50,000 - 100,000	3,386	2.6	59.4	24.2	14.37	48,686
Total cities below 50,000	23,718	18.2	52.7	25.2	13.28	314,975
Grand Total U. S.	130,317	100.0	66.2	25.7	17.01	2, 16,692

Source: Code Authority for Men's Clothing Industry

a/ Average weekly payrolls were obtained by multiplying total employees by a[illegible] weekly earnings

b/ Includes such cities as Knoxville, Fort Wayne, Indianapolis, Louisville, Syracuse, Utica, etc.

TABLE IX

EMPLOYMENT, EARNINGS, HOURS AND PAYROLLS

	Number Employed	Average Weekly Man-hours	Total Weekly Man-hours	Average Hourly Earnings	Average Weekly Earnings	Total Weekly Payroll
1929						
March	154,135	36.0	5,548,860	$.690	$24.82	$3,825,631
Annual average	149,868	33.1	4,960,630	.690	22.84	3,422,985
1933						
March	109,610	28.9	3,167,729	.438	12.68	1,389,855
1934						
July	125,857	26.2	3,297,453 a/	.647	16.95	2,133,452
August	136,215	28.0	3,814,020	.661	18.49	2,521,067
September	139,051	25.2	3,504,085	.663	16.71	2,323,208
October	134,489	26.7	3,590,856	.666	17.78	2,391,510
November	122,898	23.6	2,900,393	.674	15.89	1,954,865
December	123,391	24.6	3,035,419	.661	16.26	2,006,412
Six-months' average	130,317	25.7	3,357,038	.662	17.01	2,221,752
1935						
January	129,803	26.0	3,374,878	.645	16.77	2,176,796
February	142,134	30.0	4,264,020	.655	19.65	2,792,933
March	147,066	33.3	4,897,298	.662	22.04	3,242,011

Source: Code Authority for Men's Clothing Industry.

a/ Average hours per week multiplied by number of wage earners.

TABLE X

INDEX OF EMPLOYMENT a/
(1933=100)

Month	Index of Employment 1933	1934
January	90.9	101.7
February	103.2	112.3
March	101.6	112.8
April	94.8	107.8
May	87.8	94.6
June	93.7	97.8
July	104.9	104.6
August	108.0	114.5
September	110.4	115.4
October	108.2	111.7
November	99.9	102.1
December	96.4	102.5
Average	100.0	106.5

Source: Unpublished data secured by the Bureau of Labor Statistics in cooperation with the Division of Research and Planning, NRA.

a/ Reporting establishments almost completely identical with the Code definition of the Men's Clothing Industry. 1934 data came from a much larger proportion of the Industry than the 1933 data.

Table VIII shows the distribution of 1934 employment by market areas. Data are not available in a form comparable with those given in Table VII.

The Men's Clothing Industry has two distinct seasons, the summer and the wimter. In the winter, clothing is produced for summer wear, and in the summer, for winter wear. An examination of the data in Table IX, which covers a complete winter season, and which is typical for both seasons, reveals a wide fluctuation in employment, ranging from 139,051 in the September week to 122,-898 in the November week.

Table X gives a continuous monthly index of employment for 1933 and 1934.

Wages and Hours

The total annual wages paid by the Industry are indicated in Table XI covering the years 1929, 1931, 1933 and 1934. The year 1933 shows the lowest total and 1929 the highest. The recovery in wage totals for 1934 approximates that for 1931. Particular attention is drawn to the fact that the total for 1934 is an approximation based on the six-months' records shown in Table IX. The Code Authority estimates little difference in totals as between the first half and the last half of 1934. A breakdown of the 1934 total between states is not available.

TABLE XI

TOTAL ANNUAL WAGES BY PRINCIPAL STATES a/
(IN THOUSANDS)

State	1929	1931	1933b/	1934
U. S. Total	$179,709	$115,041	$92,266	$115,530c/
Illinois	28,678	16,282	10,376	
Maryland	9,016	7,145	6,188	
Massachusetts	6,446	5,235	4,078	
New Jersey	9,143	6,541	6,212	
New York	65,149	38,522	29,906	
Ohio	16,553	10,627	8,238	
Pennsylvania	20,817	14,741	13,561	
Other States	25,967	15,948	13,707	

Source: Census of Manufactures "Men's Clothing".

a/ Employees included: skilled and unskilled wage earners of all classes Wages include: average annual payroll for wage earners of all classe Regular factories and contract shops combined.

b/ 1933 figures are not comparable with those for previous years because of changes in the Census classification.

c/ Table IX, six-months' average weekly earnings multiplied by 52.

The average hourly wage rate and the average hours worked per week per employee for certain years and months for the entire Industry are shown in Table IX. These data are not available for each state. However, Table VIII presents average hours per week, average hourly earnings, average weekly earnings, for the entire Industry, broken down by important market areas. These data are summarized in part in Table XII.

TABLE XII

AVERAGE HOURLY WAGE RATE AND AVERAGE HOURS PER WEEK a/

Year	Average Hourly Wage	Average Weekly Earnings	Average Weekly Hours
1930	$.701	$20.00	37.8
1932	.506	13.70	37.3
1933	.438	12.68	28.9
1934	.662	17.01	25.7

Source: Bureau of Labor Statistics, Trend of Employment and Bulletins on Wage and Hours of Labor in the Men's Clothing Industry; 1934 data from the Code Authority for Men's Clothing Industry.

a/ Data are for pay periods at or near the Industry's peak, except that for 1933 they refer to March.

Continuity of Employment

The Men's Clothing Industry, which is fairly well unionized, maintains two practices with respect to work. First, there is generally practiced an equal division of work in factories. Secondly, factories having contractual relations with unions usually provide for tenure of employment, i.e., a worker is usually permanently attached to a factory, after a probationary period, and may not be discharged except for cause. Also, the Industry is highly seasonal. Because of these factors, an estimate of continuity of employment must be based on the average number employed. (See Table VII)

Child Labor

The following statement was prepared by the Code Authority for Men's Clothing Industry, as a "Memorandum Regarding Homework," April 30, 1935:-

"At the request of the Division of Research and Planning of the NRA, the Men's Clothing Code Authority in August, 1934 collected data with respect to the homework situation in the Men's Clothing Industry, before September 11, 1933, the date the Code became effective, and after its enactment. The clothing markets of Rochester, Philadelphia and New York are represented in the data presented, which, while not complete, are accurate so far as they go.

"In April, 1933, which was prior to the effective date of the Code, there were 7,310 homeworkers employed in the clothing markets mentioned. In August, 1933, there were 2,381 homeworkers in the same markets; and in April, 1934, the amount of homework being done was nil.

"Expansion in factory facilities since the effective date of the Code took place to accommodate those workers who had formerly been working in the home. In Rochester two new departments were laid out and equipped for former homeworkers. In Philadelphia contractors previously employing homeworkers moved into up-to-date shops. In New York fifteen new factories opened, employing 800 people; other homeworkers were absorbed by existing factories which increased their staffs.

"There has been complete cooperation by all the elements in the Men's Clothing Industry, manufacturers, contractors and workers, in eliminating homeworkers from our Industry. There is no homework being done in the Men's Clothing Industry."

Employment by States

For average number of wage earners by states for the years 1929, 1931, 1933, see Table VII. A more detailed breakdown of number and per cent of person employed (and wages paid) in various states for the years 1929 and 1931 is found in Table XIII. Comparable data are not available for more recent years. The per cent man-hours worked in various states is given in Table XIV.

TABLE XIII

NUMBER AND PER CENT OF PERSONS EMPLOYED, AND TOTAL WAGES PAID, BY PRINCIPAL STATES

	1929				1931			
	Wage Earners a/		Wages Paid		Wage Earners a/		Wages Paid	
	Number	Per cent	Amount	Per cent	Number	Per cent	Amount	Per cent
U. S Total	149,868	100.0	$179,768,808	100.0	121,964	100.0	$115,040,997	100.0
Ca ifornia	2,267	1.5	2,659,321	1.5	1,618	1.3	1,697,845	1.5
Colorado	467	0.3	364,189	0.2	304	0.2	223,371	0.2
Connecticut	751	0 5	1,018,175	0.6	791	0.6	683,069	0.6
Georgia	426	0.3	218,433	0.1	607	0.5	327,950	0.3
Illinois	20,304	13.5	28,678,113	16.0	15,203	12.5	16,281,957	14.2
Indiana	2,236	1.5	1,946,270	1.1	2,329	1.9	1,568,234	1.4
Kentucky	2,186	1.5	1,623,550	0.9	1,555	1.3	972,220	0.8
Louisiana	1,337	0.9	729,143	0 4	1,230	1.0	639,073	0.6
Maine	311	0.2	238,309	0.1	282	0.2	244,441	0.2
Maryland	10,007	6.7	4,620,356	2.6	9,642	7.9	7,145,089	6.2
Massachusetts	5,551	3.7	6,445,578	3.6	5,345	4.4	5,235,051	4.6
Michigan	1,085	0.7	927,428	0.5	1,164	1.0	698,178	0.6
Minnesota	2,128	1.4	2,377,092	1.3	1,272	1.0	1,203,391	1.0
Missouri	4,957	3.3	4,682,726	2.6	3,760	3.1	3,077,923	2.6
New Hampshire	240	0.2	177,409	0.1	183	0.2	167,806	0.1
New Jersey	7,910	5.3	9,143,167	5.1	7,559	6.2	6,540,589	5.7
New York	47,210	31.6	65,148,773	36.1	34,805	28.6	38,522,031	33.5
Ohio	13,215	8.8	16,553,057	9.2	11,536	9.5	10,627,278	9.2
Pennsylvania	18,473	12.3	20,817,217	11.6	16,274	13.3	14,740,865	12.8
Tennessee	1,273	0.8	713,693	0.4	1,034	0.8	545,591	0.5
Texas	277	0.2	194,070	0.1	268	0.2	183,394	0.2
Virginia	2,381	1.6	1,538,218	0.9	1,792	1.5	1,079,486	0.9
Washington	119	0.1	166,782	0.1	92	0.1	110,206	0.1
Wi consin	2,467	1.6	2,503,056	1.4	1,642	1.3	1,430,385	1.2
Other States	2,288	1.5	6,209,683	3.5	1,677	1.4	1,095,574	1.0

Source: Census of Manufactures, "Men's Clothing"

a/ Average for the year.

TABLE XIV

PER CENT MAN-HOURS WORKED, BY PRINCIPAL STATES
JANUARY, 1935

State	Man-Hours worked as per cent of total
U. S. Total	100.0
California	.8
Colorado	.1
Georgia	.3
Illinois	11.2
Indiana	1.9
Iowa	.3
Kentucky	1.1
Louisiana	2.8
Maryland	7.9
Massachusetts	3.0
Minnesota	.3
Missouri	.3
New Jersey	6.5
New York	33.9
North Carolina	.2
Ohio	8.0
Oregon	.1
Pennsylvania	16.3
Tennessee	2.7
Virginia	1.7
Wisconsin	.4
Other States	.2

Source: Code Authority for Men's Clothing Industry.

Annual Wages

Total annual wages paid in each state are presented in Tables XI and XIII

Ratio of Labor Cost to Value of Product

Table XV gives the percentage which the cost of labor is of the value of products for the years 1929, 1931, 1933, 1934.

TABLE XV

RATIO OF LABOR COST, AND OF MATERIALS' COST TO TOTAL VALUE OF PRODUCT

Year	Total Value of Product (000's)	Labor Cost a/ Amount (000's)	Labor Cost a/ Per Cent of Total	Materials' Cost b/ Amount (000's)	Materials' Cost b/ Per Cent of Total
1929	$901,104	$179,769	19.9	$440,505	48.9c/
1931	551,416	115,041	20.9	263,675	47.8c/
1933 d/	430,829	92,266	21.4	217,731	50.5c/
1934	450,000 e/	115,530 f/	25.7 f/	- - -	-

Source: Census of Manufactures, "Men's Clothing"; 1934 figures from Code Authority for Men's Clothing Industry.

a/ Consists only of wages paid to wage earners.

b/ Cost of materials, fuel, and purchased electric energy.

c/ These figures cover all men's clothing (except work) as classified by the Census of Manufactures.

d/ Because of changes in Census classifications, 1933 figures are not comparable with those for previous years.

e/ Code Authority estimate.

f/ Estimated on basis of Code Authority figure for value of products.

CHAPTER III

MATERIALS: RAW AND SEMI-PROCESSED

Principal Materials Used

The principal materials used by the Men's Clothing Industry are woolen suitings and pantings, flannel suitings and pantings, topcoatings, overcoatings, worsted staple suitings and pantings and fancy suitings and pantings.

Cost of Materials

Table XVI presents the volume and value of the production of material by kinds used in the Men's Clothing Industry for the years 1929, 1931, 1933. It is impossible to determine how much of those materials is used by the Men's Clothing Industry, so the data given in Table XVI covers all of the materials produced.

Source of Materials

Sources, by states, of the materials used in the Men's Clothing Industry can only be obtained for the total production as shown in Table XVII. It is noted that the bulk of the materials is produced in the New England states of which Massachusetts, Rhode Island, Connecticut and Maine supply the greater proportion.

Cost of Machinery and Equipment

No estimate exists of the amount spent for machinery and equipment in the Men's Clothing Industry.

Ratio of Material's Cost to Value of Products

Percentage which the cost of materials is of the value of products is of the value of products is shown for the years 1929, 1931, 1933, 1934 in Table XV. Attention is directed to the fact that "materials" in this table includes fuel and electric energy, as well as the types of cloth listed in Table XVII "principal materials used." Further, all figures and percentages for the years 1929, 1931, and 1933 relate to all types of men's clothing except work clothing and, hence, do not conform to code classifications. The 1934 figures do follow code lines, but the total value figure is adjusted to cover the entire Industry including non-reporting branches and establishments.

TABLE XVI

TOTAL VOLUME AND VALUE OF PRODUCTION OF MATERIAL USED BY THE INDUSTRY, BY KINDS a/

Kind of Material	1929		1931		1933	
	Volume (000 lbs.)	Value (000's)	Volume (000 lbs.)	Value (000's)	Volume (000 lbs.)	Value (000's)
Total	132,774	$231,273	91,237	$161,226	103,939	$146,734
Woolen suitings and pantings, (except flannel)	34,802	52,750	17,347	23,128	20,526	19,076
Flannel suitings and pantings	2,099	4,204	2,831	4,260	5,131	7,415
Topcoatings	5,333	10,315	3,362	5,267	7,184	8,387
Overcoatings	21,684	25,019	9,879	10,666	20,233	14,084
Worsted staple suitings and pantings	35,100	89,095	29,036	55,856	23,252	46,743
Fancy suitings and pantings	33,756	99,895	23,232	62,049	27,613	51,074

Source: Census of Manufactures, "Woolens and Worsted Goods."

a/ It is impossible to determine how much of these goods is used by the Men's Clothing Industry.

...NCIPAL MATERIALS USED BY THE INDUSTRY,
BY KINDS AND STATES, 1929 a/

State	Suitings and Pantings, Except Flannel		Flannel Suitings and Pantings		Topcoatings		Overcoatings		Staple Suitings and Pantings		Fancy Suitings and Pantings	
	Value (000's)	Per cent of Total	Value (000's)	Per cent of Total	Value (000's)	Per cent of Total	Value (000's)	Per cent of Total	Value (000's)	Per cent of Total	Value (000's)	Per cent of Total
U. S. Total	$52,750	100.0	$4,204	100.0	$10,315	100.0	$25,019	100.0	$89,095	100.0	$39,625	100.0
Connecticut	5,317	10.1	--	--	2,251	21.8	3,569	14.3	--	--	7,121	7.1
Maine	9,250	17.5	667	15.9	662	6.4	2,885	11.5	--	--	--	--
Massachusetts	12,435	23.5	1,068	25.4	1,590	15.4	11,482	45.9	33,061	37.1	34,375	34.5
Michigan	304	0.6	--	--	--	--	--	--	--	--	--	--
New Hampshire	3,984	7.6	--	--	--	--	--	--	--	--	--	--
New Jersey	--	--	--	--	--	--	--	--	--	--	6,398	6.4
New York	4,306	8.2	--	--	--	--	--	--	--	--	7,496	7.5
Oregon	--	--	--	--	--	--	1,351	5.4	--	--	--	--
Pennsylvania	1,773	3.4	--	--	--	--	--	--	10,767	12.1	7,237	7.2
Rhode Island	--	--	--	--	--	--	868	3.5	31,785	35.7	25,440	25.5
Vermont	793	1.5	--	--	--	--	907	3.6	--	--	--	--
Wisconsin	--	--	--	--	--	--	632	2.5	--	--	--	--
Other States	14,568	27.6	2,469	58.7	5,812	56.4	3,325	13.3	13,482	15.1	11,828	11.8

Source: Census of Manufactures, "Woolen and Worsted Goods."

a/ It is impossible to determine how much of these goods are used by the Men's Clothing Industry.

CHAPTER IV

PRODUCTION AND DISTRIBUTION

Value and Volume of Production

The value and volume of products of the Men's Clothing Industry for the years 1929, 1931 and 1934 are presented in Table XVIII. The data for value and volume are obtained from the Census of Manufactures, except for the year 1934. The 1934 values were estimated by the Code Authority for Men's Clothing Industry, using the 1933 average unit values as reported in the Census of Manufactures, suitably adjusted.

TABLE XVIII

VOLUME AND VALUE OF PRODUCTS BY PRINCIPAL PRODUCING STATES[a/]

State	1929		1931		1934 b/	
	Volume (Thousand Garments)	Value (In thousands)	Volume (Thousand Garments)	Value (In thousands)	Volume (Thousand Garments)	Value (In thousands)
U. S. Total	77,801	$728,105	62,319	$447,881	45,322	$397,876
Illinois	5,771	105,234	3,978	53,180	4,133	36,286
Maryland	3,042	37,143	3,146	22,021	3,263	28,647
Massachusetts	1,947	18,132	1,790	13,635	1,845	16,194
New York	36,498	333,390	28,855	211,755	20,998	184,336
Ohio	5,408	61,070	3,857	40,159	5,062	44,443
Pennsylvania	7,240	75,571	7,648	45,247	5,312	46,631
Other States	17,895	97,565	13,045	61,884	4,709	41,339

Source: Census of Manufactures, "Men's Clothing;" 1934 data from the Code Authority for Men's Clothing Industry.

a/ Value is based on the selling price at the factory, whether sold or in stock, except for 1929, when value refers to value sold only. Data for 1933 are not broken down by states. The totals are 37,491,000 garments and $326,913,000, but because of changes in Census classifications these figures are not strictly comparable with those for previous years.

b/ Figures for states were computed by the Code Authority for Men's Clothing Industry using 1933 Census totals.

Table XIX shows a more detailed breakdown by states of value and volume expressed in percentage terms, as well as totals for the year 1934.

TABLE XIX

PERCENTAGE OF TOTAL GARMENTS CUT, BY PRINCIPAL STATES, 1934

State	Per Cent of Total	Volume of Production (Thousand Garments)	Value of Production (In thousands)
U. S. Total	100.0	45,323	$397,876
California	.4	195	1,711
Georgia	1.2	548	4,814
Illinois	9.1	4,133	36,286
Indiana	.9	421	3,700
Kentucky	.7	308	2,706
Louisiana	1.5	671	5,889
Maryland	7.2	3,263	28,647
Massachusetts	4.1	1,845	16,194
Minnesota	.3	113	995
Missouri	2.1	970	8,514
New Jersey	.7	317	2,785
New York State	46.2	20,998	184,336
Ohio	11.2	5,062	44,443
Oregon	.1	32	279
Pennsylvania	11.7	5,312	46,631
Puerto Rico	.1	32	279
Tennessee	1.2	526	4,615
Virginia	.7	295	2,586
Wisconsin	.4	159	1,392
Other States	.2	123	1,074

Source: Code Authority for Men's Clothing Industry.

Data are not available showing the shipment of Men's clothing between states. For the year 1929 the United States Census of Distribution shows the distribution of sales of manufacturing plants in the Men's Clothing Industry, however, these data are for regular factories only and are not broken down by states.

TABLE XX

DISTRIBUTION OF SALES OF
MANUFACTURING PLANTS BY TYPE OF PURCHASER, 1929

Type of Purchaser	Number of Plants a/	Value of Sales (In thousands)	Per cent of Total Sales
Total Distributed Sales	2,167 b/	$833,242	100.0
Sales to Retailers	1,416	524,831	63.0
Sales to Wholesalers	472	118,747	14.2
Sales to Manufacturer's Own Retail Branches	125	69,161	8.3
Sales to Manufacturer's Own Wholesale Branches	80	49,752	6.0
Sales to Household Consumers	299	48,813	5.9
Sales to Industrial and Other Large Purchasers	163	21,938	2.6

Source: Fifteenth Census of the United States: Distribution of Sales of Manufacturing Plants.

a/ Regular factories only.

b/ Number of plants given for "total distributed sales" is not the sum total of the number of plants given for the six sub-groups because some plants fall within more than one category, and are, therefore, counted more than once.

The distribution among the more important states of wholesale and retail establishments, dealing with products of the Men's Clothing Industry, is shown by Table XXI for the years 1929 and 1933.

TABLE XXI

NUMBER OF WHOLESALE AND RETAIL ESTABLISHMENTS a/

State	1929		1933	
	Wholesale	Retail	Wholesale	Retail
U. S. Total	547	44,949	478	60,531
California	40	1,710	44	3,004
Illinois	65	2,461	66	3,726
Massachusetts	53	1,501	22	2,379
Michigan		1,605	5	2,269
New Jersey		1,465		2,916
New York	167	5,689	186	9,150
Ohio	30	2,300	21	3,141
Pennsylvania	55	3,774	28	5,088
Texas		2,124		2,871
Other States	137	22,320	106	25,987

Source: Census of Wholesale Distribution; Census of Retail Distribution; "Men's Clothing Industry."

a/ Retail establishments here include department stores, general merchandise, men's clothing, and family clothing stores. Wholesale establishments include men's and boys' clothing.

Volume and value of exports of men's clothing is shown in Table XXII and covers the years 1929, 1931, 1933 and 1934. It is readily seen that the export business of this Industry is negligible.

TABLE XXII

VALUE AND VOLUME OF EXPORTS

Year	Value	Volume (Number of Garments)
1929	$716,000	155,000
1931	282,000	54,000
1933	140,779	46,916
1934	85,133	17,710

Source: Bureau of Foreign and Domestic Commerce, Monthly Summary of Foreign Commerce.

Limited data are available with respect to advertising in the Men's Clothing Industry. Tables XXIII and XXIV show amounts spent on national magazine advertising and newspaper space used by certain large firms in the Industry. While the number of firms is not great, they are known to be large and nation-wide in activity.

Migration in the Men's Clothing Industry

The most striking phase of the economic development of the Men's Clothing Industry during the last decade (1923-1933), according to S. H. Nerlove, Associate Professor of Business Economics, University of Chicago, is the movement of the Industry out of the major manufacturing centers, into smaller cities and country districts.1/ In support of this contention, Professor Nerlove gives the following statistics which are based on Census of Manufactures data:

> "The wage earners in the five major manufacturing centers declined from 94,000 to 61,000 between 1923 and 1931, or about 35 per cent, whereas, the wage earners outside of these centers declined only about 4 per cent.
>
> "The decline in establishments in the five major manufacturing centers between 1923 and 1931 was approximately 32 per cent, whereas the decline outside of these centers was much less, about 13 per cent.
>
> "Approximately the same situation has prevailed with reference to the average value of products and receipts from contract work in this industry. The five major manufacturing centers declined over 52 per cent in the value of products and receipts between 1923 and 1931. Between the same two years, 1923 and 1931, the decline outside of these centers was only about half, 27 per cent."

For additional evidence bearing on shifts of centers of products in the Industry, attention is called to Table XXV showing wage earners in regular factories and contract shops, by states, 1923, 1925, 1927, 1929, 1931, and 1933. The only available check on shifts as between 1933 and 1934 consists of a comparison of the number of garments cut for nine important manufacturing centers in these two years. (See Table XXVI).

1/ Clothing Manufacturers Association of America, "Statistical and Economic Analysis Related to Sections II and V, Code of Fair Competition for the Men's Clothing Industry."

TABLE XXIII

NATIONAL MAGAZINE ADVERTISING OF SELECTED CLOTHING MANUFACTURERS a/

Manufacturer	Address	1929 Number of Magazines Used	1929 Cost of Space	1933 Number of Magazines Used	1933 Cost of Space
A. Nash Company	Cincinnati	1	$161,500		
Hart Schaffner and Marx	Chicago	1	149,500		
B. Kupenheimer and Co., Inc.	Chicago	2	80,000		
Middishade Co., Inc.	Philadelphia	1	59,500	1	$17,100
Alford Decker and Cohn	Chicago	5	47,380		
Rosenberg Bros. and Company	Rochester	1	38,000		
Ed. V. Price and Co.	Chicago	3	33,600		
P. H. Davis Tailoring Co.	Cincinnati	1	20,000		
Leroy Bros. and Adler - Rochester, Inc.	New York	2	5,950	1	2,500
Hech T. Lears Clothing Co.	St. Louis	1	3,570		
American Match Pants Co.	Chicago	5	2,384	3	852

Source: National Advertising Records, Chicago, Illinois.

a/ This is not a complete list but is merely a record of the outstanding advertisers. Figures for expenditures for local advertising are not available.

TABLE XXIV

NEWSPAPER ADVERTISING OF TWO LEADING COMPANIES,
BY CITIES COVERED

Manufacturer	Cities Advertised in	Number of Newspapers Used	Total Agate Lines	Number of Newspapers Used	Total Agate Lines a/
Hart, Schaffner and Marx (Chicago)	Cleveland	2	3,775	1	904
	South Bend	1	840	-	-
	Wichita	1	1,50[illegible]	-	-
	Oakland	2	1,564	-	-
	Baltimore	-	--	2	1,792
	Boston	-	--	1	888
	Hartford	-	--	1	2,484
	New York	-	--	2	1,796
	Philadelphia	-	--	1	5,048
	Providence	-	--	1	2,508
	Syracuse	-	--	1	2,376
	Buffalo	-	--	1	896
	Chicago	-	--	1	904
	Cincinnati	-	--	1	912
	St. Louis	-	--	1	892
	Los Angeles	-	--	1	904
	San Francisco	-	--	1	888
Total		6	7,679	16	23,192
Cohen, Goldman Company (New York City)	Boston	-	--	1	8,036
	New York	-	--	1	20,720
	Philadelphia	-	--	1	4,040
	Chicago	-	--	1	15,232
	Pittsburgh	-	--	1	2,070
	St. Louis	-	--	1	4,040
Total		-	--	6	54,138

Source: Media Records, New York City.

a/ An agate line is one column wide and one inch deep.

TABLE XIV

[illegible] BY PRINCIPAL STATES a/

State	1923 Number	1923 Per cent	1925 Number	1925 Per cent	1927 Number	1927 Per cent	1929 Number	1929 Per cent	1931 Number	1931 Per cent	1933 b/ Number	1933 b/ Per cent
Total	178,720	100.0	174,332	100.0	146,099	100.0	149,868	100.0	121,964	100.0	117,862	100.0
Alabama	504	0.3	761	0.4								
Arkansas			396	0.2								
California	3,511	1.8	3,289	1.9	1,415	1.0	2,267	1.5	1,618	1.3	1,924	1.6
Colorado	291	0.1	432	0.2			467	0.3	304	0.2	313	0.3
Connecticut	925	0.5	1,143	0.7	878	0.6	751	0.5	791	0.6	759	0.6
Delaware			277	0.2								
Florida							22	0.1				
Georgia	2,314	1.2	2,495	1.4	186	0.1	428	0.3	607	0.5	960	0.8
Illinois	33,888	17.4	25,169	14.4	22,060	15.0	20,304	13.5	15,203	12.5	13,446	11.4
Indiana	3,729	1.9	3,485	2.0	1,706	1.2	2,236	1.5	2,329	1.9	2,538	2.2
Iowa	1,182	0.6	807	0.5	195	0.1	518	0.3			398	0.3
Kansas	285	0.1	333	0.2			38	0.1				
Kentucky	3,972	2.0	3,528	2.0	2,456	1.7	2,186	1.5	1,555	1.3	1,711	1.5
Louisiana	1,272	0.6	1,566	0.9	713	0.5	1,337	0.9	1,230	1.0	951	0.8
Maine	424	0.2	384	0.2	243	0.2	311	0.2	282	0.2	251	0.2
Maryland	9,720	5.0	10,114	5.8	8,816	6.0	10,007	6.7	9,642	7.9	9,482	8.1
Massachusetts	7,543	3.9	6,230	3.6	6,488	4.4	5,551	3.7	5,345	4.4	5,143	4.4
Michigan	1,716	0.9	1,709	1.0	643	0.5	1,085	0.7	1,164	1.0	994	0.8
Minnesota	1,914	1.0	1,849	1.1	1,562	1.1	2,128	1.4	1,272	1.0	1,227	1.0
Missouri	8,548	4.4	8,458	4.9	4,171	2.9	4,957	3.3	3,760	3.1	2,663	2.3
Nebraska			196	0.1								
New Hampshire	318	0.2	430	0.2	192	0.1	240	0.2	183	0.2		
New Jersey	7,006	3.6	6,967	4.0	6,522	4.5	7,910	5.3	7,559	6.2	8,508	7.2
New York	58,620	30.1	49,928	28.6	49,523	33.8	47,210	31.5	34,805	28.5	33,086	28.1
North Carolina	740	0.4	1,051	0.6								
Ohio	13,836	7.1	14,309	8.2	13,318	9.1	13,215	8.8	11,536	9.5	10,774	9.2
Oklahoma			169	0.1								
Oregon			636	0.4	391	0.3	488	0.3				
Pennsylvania	18,421	9.5	16,802	9.6	17,378	11.9	18,473	12.3	16,274	13.4	17,116	14.5
Tennessee	1,772	0.9	2,093	1.2	1,347	0.9	1,273	0.8	1,034	0.8	2,238	1.9
Texas	2,457	1.3	2,862	1.6	132	0.1	277	0.2	268	0.2	133	0.1
Utah			355	0.2								
Vermont	261	0.1	320	0.2								
Virginia	2,170	1.1	1,707	1.0	1,434	1.0	2,381	1.6	1,792	1.5	1,936	1.6
Washington	546	0.3	649	0.4	298	0.2	119	0.1	92	0.1		
West Virginia	846	0.4	544	0.3								
Wisconsin	3,970	2.0	2,424	1.4	2,559	1.8	2,467	1.6	1,642	1.3	1,309	1.1
Other States	2,119	1.1	465	0.3	1,473	1.0	1,222	0.8	1,677	1.4		

Source: Census of Manufactures, "Men's Clothing Industry."

a/ Regular factories and contract shops combined. Number of wage earners represents average for the year.

b/ Because of changes in Census classifications, 1933 data are not comparable with previous years.

TABLE XXVI

NUMBER OF GARMENTS CUT, IN NINE PRINCIPAL CITIES
(In thousands)

Year	Grand Total	Total for Nine Cities	New York	Chicago	Baltimore	Philadelphia	City Cincinnati	Rochester	St Louis	Cleveland	Boston
1933											
January	3,176	1,144	426	122	163	163	33	46	60	80	51
February	3,892	1,469	593	117	209	189	46	74	72	117	53
March	4,055	1,471	602	111	200	192	52	63	94	96	61
April	3,957	1,384	531	114	224	150	63	36	97	116	53
May	4,828	1,413	577	112	250	123	85	21	105	92	48
June	5,091	1,619	778	128	274	170	62	79	119	143	72
July	4,693	1,697	595	127	253	218	49	94	113	140	68
August	5,200	2,120	876	177	290	246	62	93	112	171	93
September	4,119	1,674	638	168	244	204	70	72	56	138	84
October	3,842	1,510	537	162	215	168	91	65	71	103	78
November	2,796	1,090	351	123	171	146	68	37	59	87	48
December	2,425	1,005	335	103	147	125	71	58	41	88	37
Total	47,500	17,756	6,839	1,576	2,640	2,094	752	738	998	1,371	746
1934											
Four weeks ending:											
Jan. 27	3,149	1,363	823	118	91	176	64	66	56	113	56
Feb. 24	4,243	1,981	970	136	204	221	81	74	47	176	72
Mar. 24	4,731	2,019	1,044	142	223	208	107	59	43	118	75
Apr. 21	4,829	2,176	1,066	127	321	194	111	38	106	157	57
May 19	4,250	1,718	854	118	262	101	95	22	73	152	41
June 16	3,730	1,545	671	126	232	87	82	49	96	151	51
July 14	3,719	1,574	685	124	212	141	66	74	88	124	60
Aug. 11	3,828	1,793	858	122	220	169	65	84	69	144	62
Sept. 8	3,790	1,812	879	124	222	170	77	55	81	140	64
Oct. 6	3,566	1,652	733	165	204	152	101	34	57	146	60
Nov. 3	3,449	1,459	641	142	203	129	91	32	60	120	41
Dec. 1	2,947	1,391	660	132	211	115	69	36	42	94	32
Dec. 29	2,890	1,441	681	132	175	138	63	68	45	103	40
Total	49,121	22,126	10,565	1,708	2,780	1,998	1,072	687	865	1,738	713

Source: Code Authority for Men's Clothing Industry. The number of establishments covered in 1934 is considerably greater than in 1933.

Productive Capacity

America's Capacity to Produce, published by the Brookings Institution, quotes a correspondent to the effect that in 1929 the Men's Clothing Industry worked 30 to 36 full weeks out of 52. The analysis made of reasons for the slack period is: 60 per cent due to seasonal variation, and 40 per cent due to lack of business. This publication gives an operating ration (men's and women's clothing industries combined) of: 63 per cent not adjusting for seasonal variation, and 85 per cent adjusting for seasonal variation. The 1923 Census places the operating ratio for the Industry at 73 per cent.

The Brookings' study estimates that the per cent of practical capacity utilized in the Men's Clothing Industry was 78 per cent for the period 1925-29, and 76 per cent for 1929.

CHAPTER V

TRADE PRACTICES

The trade practices which the Men's Clothing Industry was almost unanimous in declaring unfair were the practices of selling on consignment and producing on a "cut, make and trim" basis. The Industry additionally, recognized that unfair practice prevailed in the matter of selling below cost and disposing of dropped lines or surplus stocks. The practices which became most detrimental were consignment selling and "cut, make and trim."

The Clothing Manufacturers' Association in submitting a code for the Men's Clothing Industry described consignment selling in the following language:

> "There has developed a growing evil in the Clothing Industry commonly known as delivery of merchandise on consignment or memorandum by the manufacturer to the distributor. This was accomplished by any of the following methods: (1) By being billed on consignment or memorandum; (2) By making the distributor an agent of the manufacturer in the sale of the product; (3) By agreement to take merchandise back that remained unsold after a given time; (4) By agreement that merchandise unsold after a given time may be exchanged for other goods; (5) By agreement that merchandise not paid for within a given time may be reclaimed or returned and other and various agreements designed to weaken or modify the usual terms upon which an order for the manufacture and sale of merchandise to cover the requirements of the distributor is given to the manufacturer."

The Clothing Manufacturers' Association, through one of its members, argued before the Deputy Administrator in the pre-code hearings that consignment selling was unfair to both the retailer and the manufacturer. It was contended that if the retailer got into financial difficulty, a manufacturer selling on consignment could withdraw his merchandise without risk of great loss, whereas a manufacturer selling outright would have a greater chance of losing more. If the retailer was strong financially and bought on consignment, it was asserted, the accumulation of unmanageable surpluses would be encouraged. It was further asserted that the practice of shipping goods for a few days for special sales usually resulted in a very low price with the consequent forcing down of wage rates. 1/

With respect to the practice of "cut, make, and trim," the Clothing Manufacturers' Association, in submitting a code, stated:

> "There has developed in the Clothing Industry a pernicious practice on the part of a certain class of distributors to manufacture clothing without the usual responsibility and obligations that a producer in the industry owes to labor for giving decent hours of work, fair wages and

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1/ Men's Clothing Hearings, July 26-27, 1933, pp. 63-66; testimony of J. G. Hickey.

sanitary working conditions. A distributor, by exerting price pressure on these operators, has become a menace to the industry and labor. This is accomplished by: (1) The distributor buys the cloth and farms it out to fly-by-night and irresponsible persons who carry no annual overhead and who shift their plant from place to place, making orderly supervision of hours of work, wages, and sanitary labor conditions in their plants impossible. The cloth is cut by these irresponsible contractors, trimmed and made up into garments; (2) The establishment of credit by the distributor for the benefit of the so-called manufacturers with the woolen mills so that, while in theory the goods are charged to the manufacturer, they are in fact purchased and paid for by the distributor, or with money advanced by the distributor to the manufacturer with which to pay for such merchandise."

In the July 26-27 hearings, pursuant to the adoption of a code, Mr. Victor Riesenfeld, spokesman for the Clothing Manufacturers' Association, summarized the objections to the practice of "cut, make and trim" as follows:

"It has been indulged in in most instances by retailers for the purpose of underselling their competitors, or where a lower selling price than the generally accepted standard is the main consideration for gettin business. The pressure of competition in forcing down the cost of cuttin making and trimming has become a menace to labor and industry. The special type of contractor or manufacturer doing this type of work has been for the most part the most irresponsible."

CHAPTER VI

GENERAL INFORMATION

Description of the Industry

There are two distinct types of firms in the Men's Clothing Industry. First, there are establishments which buy material, cut the cloth, market the finished product, finance production from raw materials to finished garments, but which often do not own and operate the plant where the garments are made. Secondly, there are establishments called "contract shops," or contractors who take out cloth and accessories from one who finances the business and performs the remaining operations necessary to completing the garment on a piece price basis. This contractor is ordinarily responsible for his own force of workmen and usually owns machinery and a workroom. Until the code went into effect, a substantial part of the work was done on a "home work" basis, in which labor was performed in the homes of the employees themselves, and not in a factory owned and conducted by the employers.

In a few cities including Chicago, Rochester, Cleveland, and St. Louis most production is found in shops which complete the entire garment. In other cities, of which New York is the most significant, the work for the most part is conducted in contract shops, having been let out by manufacturers who cut the cloth and who, as above described, finance the entire process. The areas (Not clearly defined) which employ the practice and use of the contract shop method of production are sometimes referred to as the "centralized areas," as distinguished from the plants, ordinarily found in small towns and cities, which produce the entire garment, and are described as the "decentralized areas." It is emphasized for certain purposes that the plants in the "decentralized areas" are highly integrated and usually employ highly sub-divided processes of manufacture.

While there are many operations in the making of a garment, depending in part upon the type of manufacture employed - these operations can be divided into a few distinct occupational groups, the principal groups being cutters, fitters, sewing machine operators, pressers, basters, hand sewers, shapers, bushelers, and tailors. 1/

Trade Association Activity

The following statement was prepared by H. K. Herwitz, member of the Code Authority for the Men's Clothing Industry, May 20, 1935.

> "There was no national trade association functioning in the Men's Clothing Industry until May 1933. For a number of years there have been local trade associations.
>
> "Clothiers' Exchange of Rochester, 850 Hudson Avenue, Rochester, New York, of which Max L. Holtz is president, and which includes all but one manufacturer in the Rochester market, was organized in 1919 and has been in continuous operation since. Its principal function is to promote the

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1/ Bureau of Labor Statistics, Wages and Hours of Labor in the Men's Clothing Industry, 1911 to 1930 (Bulletin 557).

welfare of the Clothing Industry of Rochester and transact negotiations with the Amalgamated Clothing Workers of America, a labor union governing conditions in the market, provide for arbitration machinery and to operate jointly with the A. C. W. of A., an Unemployment Insurance Fund.

"New York Clothing Manufacturers' Exchange, Inc., 22 E. 17th Street, New York, New York, of which Mr. Charles D. Jaffee is president, was organized in 1922 and functions similar to the Rochester Clothiers' Exchange.

"Philadelphia Clothing Manufacturers' Association, Inc., W. B. Flickstein, secretary, 215 S. Broad Street, Philadelphia, Pennsylvania, was organized in 1929 and operates similarly to the Clothiers' Exchange of Rochester, except that there is no Unemployment Insurance Fund.

"Baltimore Clothing Manufacturers' Association, Inc., 906 Baltimore Life Building, Baltimore, Maryland, Benjamin Lebow, president, was organized in 1933 and its function is limited to the welfare of the Clothing Industry in the Baltimore market. Each manufacturer makes its own agreement with the labor union.

"American Clothing Contractors' Association was formed in July 1933. This organization is national in its activities. It is composed of representatives from various local contractors' associations. The general function is to represent the contractors in their dealings with manufacturers in various parts of the country.

"The Clothing Manufacturers' Association of the United States was organized in May 1933, primarily for the purpose of presenting a Code of Fair Competition for the Men's Clothing Industry. It was organized by representatives from the various local organizations above referred to and by individual manufacturers who did not belong to any association, but were considered representative of various market areas such as Chicago, Cincinnati, and of manufacturers in localities where there were organizations, but where there were also independent manufacturers who were not members of the Association. It is estimated at the present time that the Clothing Manufacturers' Association of the United States employs over 75 per cent of the workers in the Industry.

"The Industrial Recovery Association was organized in June 1933 to present a code in opposition to the code submitted by the Clothing Manufacturers' Association of the United States. They had 111 members in July, 1933, but this number was reduced to approximately 70 by February 1935. In part the reduction came from resignation from the Association because they had signed the union agreement; in other cases, because products manufactured did not come within the jurisdiction of the Men's Clothing Code. It is estimated at the present tine that the Industrial Recovery Association employs about 15 per cent of the workers in the Industry."

Labor Relations

Two labor unions operate in the Men's Clothing Industry - The United Garment Workers of America, and the Amalgamated Clothing Workers of America. Mr. Sidney Hillman, president of the last-named group, stated at the pre-code hearing of July 26, 1933 that the Industry was 80 per cent organized. One group of plants in the Industry, located principally in the urban "centralized" areas, is almost entirely unionized, having working agreements with the Amalgamated Clothing Workers. Another group, located mainly in the small cities and country areas, operates under working agreements with the United Garment Workers of America.

Until around 1910-11, the United Garment Workers, affiliated with the American Federation of Labor, was the only union in the Industry. This union centered in the Chicago area and about the firm of Hart-Schaffner and Marx, which had developed a tremendous business through national advertising and standardized quality. Hart-Schaffner and Marx operated an inside shop, but were under contract control, also

Labor in 1911 struck against both management and labor leadership. The Amalgamated Clothing Workers' Union was founded and has since become the dominant union of the Industry. The Chicago strike of 1911, headed by the Amalgamated group, lead to the recognition of a more responsible relationship of manufacturers to employees. The irresponsible contractor control system in Chicago was eliminated. The aggressive Amalgamated Union by 1919 had achieved unionization of the entire Chicago market and of other sized markets throughout the country. The important New York market has had agreements with the Amalgamated since 1914, the last strike was in 1920.

Trade-marks

H. K. Herwitz of the Men's Clothing Code estimates that about 25 to 30 per cent of the products of the Industry are trade-marked (registered).

Foreign Imports

Foreign imports have no significant effect upon the Men's Clothing Industry.

Industry Experts

Following are names, addresses, business affiliations and qualifications of persons who, due to training and experience, are thoroughly familiar with conditions in the Men's Clothing Industry:

> Raymond H. Reiss: International Tailoring Company, 107 - 4th Avenue, New York, New York - Charge of manufacturing operations for the International Tailoring Company and the J. L. Taylor Company, leading tailor-to-the-trade manufacturers in the country. Mr. Reiss is also chairman of the Executive Committee of the Code Authority for the Men's Clothing Industry. He has been in charge of the International Tailoring Company for a number of years, and is one of the best qualified persons on the tailor-to-the-trade branch of the Industry.

Victor Riesenfeld: Cohen-Goldman Company, 45 W. 18th Street, New York, New York - in charge of manufacturing for Cohen-Goldman Company, one of the larger manufacturers of standard private trade-marked clothing in the country. Mr. Riesenfeld is chairman of the Committee on Enforcement for the Men's Clothing Industry Code Authority, and has had 25 years experience in charge of clothing manufacturing operations.

Hyman Blumberg: Amalgamated Clothing Workers of America, 11-15 Union Square, New York, New York, one of the labor members of the Men's Clothing Industry Code Authority; is a member of the General Executive Board of the Amalgamated Clothing Workers of America. Mr. Blumberg is in general charge of fixing piece work rates in negotiations carried on by this organization. Mr. Blumberg is considered an expert on direct labor costs.

Harry K. Herwitz: Code Authority for Men's Clothing Industry, 51 Madison Avenue, New York, New York - Comptroller of the Men's Clothing Industry Code Authority; formerly statistician for the Amalgamated Clothing Workers of America, and he, also, prepared the economic briefs for the union in connection with the code hearings.

David Drechsler: 225 - 5th Avenue, New York, New York, - has been, for the last ten years, counsel for the New York Clothing Manufacturers' Exchange, and since 1933, secretary and counsel for the Clothing Manufacturers' Association of the United States. He is at present secretary and general counsel to the Code Authority for Men's Clothing Industry. Mr. Drechsler drafted the Code for the Clothing Manufacturers' Association, which was presented at the public hearing in July 1933, and is unusually well-qualified in all the legal and industrial aspects of the Code as it affects the Industry.

Progress of the Men's Clothing Industry Under the Code

The following statement was prepared by Mark W. Cresap, president of the Clothing Manufacturers' Association of the United States, May 22, 1935.

"The Men's Clothing Code has been in operation for twenty months. Its experiences and achievements under the National Recovery Act are worthy of careful consideration in the present deliberations concerning the extension of the NRA. The purpose of the Recovery Act was (1) to increase employment; (2) to increase purchasing power; (3) to rehabilitate industry without appreciable burden on the consumer. These high purposes have been achieved. This is the record.

(1) How Workers in the Industry were Affected

Period	Number of Workers Employed	Total man-hours worked per week	Average Weekly Earnings	Total Weekly Payroll
March 1929	154,135	5,548,860	$24.82	$3,825,631
March 1933	109,610	3,167,729	12.68	1,389,855
March 1935	147,066	4,897,298	22.04	3,242,011

(Source: United States Bureau of the Census; United States Bureau of Labor Statistics; Code Authority for Men's Clothing Industry.)

(2) How the Consumer was Affected

Present day retail prices of clothing of standard brands in all price ranges are only from 16 per cent to 25 per cent higher than they were in the spring, 1933, the time of the bank holiday; present day prices are approximately 20 per cent - 30 per cent below 1929 prices.

(3) How the Manufacturers in the Industry were Affected

Dun and Bradstreet's reports to us containing an analysis of 220 identical establishments combined showed a loss in 1932 and an average profit on volume of sales for the years 1933 and 1934 of 2 per cent per year for each of these two years.

Dun and Bradstreet also gives us the following information on bankruptcies for the manufacturers of clothing for the past three years; (Note: Includes manufacturers of both men's and women's clothing.)

Year	Number	Liabilities
1932	840	$23,298,941
1933	298	7,100,951
1934	211	5,257,241

"It will be observed that the Recovery Act has put almost forty thousand (40,000) workers in the Industry back into the shops and that employment today is within striking distance of the 1929 enrollment. Average wages, which were as low as $12.00 per week in 1933, are now back to $22.00 a week; and the total weekly payroll has increased one hundred and thirty-three per cent (133%), thus enabling the worker in the Clothing Industry to purchase an increasing amount of products of other industries.

"The improvement in the Clothing Industry to the worker and to the manufacturer, as can be clearly seen from the above figures, has not been at the expense of the consumer. While wages in the Industry are approaching the 1929 levels, prices to the consumer are considerably below those prevailing in 1929. Present day retail prices are fully twenty per cent (20%) to thirty per cent (30%) below the 1929 level. It will be observed that the margin of profit for the clothing manufacturer is approximately 2 per cent on gross sales. Figures on the great decline of bankruptcies in the Industry speak for themselves.

"Production in 1935 is higher by twenty per cent (20%) than it was in 1934 and 1934 was an improvement over 1933 and 1932.

"It requires from three to four yards of cloth to make a suit of clothes. This increased production has meant more work for the wool manufacturer and an expanding market at better prices for the sheep grower.

"To the Clothing Industry which has accomplished so much in rehabilitating itself and which has 'gone' back to work, a termination or emasculation of the Recovery Act at this time would be disastrous and would quickly undo all that has been accomplished toward increasing employment, increasing purchasing power and generally rebuilding industry."

Exhibit A

Firms With New York City Offices
Which Manufacture Outside New York State

Alco Zander Co.
Anderson Kondazian Co., Inc.
Arons, Adolph & Sons
Baker Clothes, Inc.
Baltimore Clothes, Inc.
Bangor Clothing Mfg. Co., Inc.
Barron Anderson Co.
Block Co., The
Braeburn of Rochester
Columbia Coat Co., Inc.
Curlee Clothing Co.
Daroff, H. & Sons, Inc.
Decker, Alfred, & Cohn, Inc.
Dumont Clothes, Inc.
Eisner, Sigmund Co.
Epstein Bros.
Fashion Park Mfg. Corp.
Fine, Max & Co.
Finkelstein, Sam & Co.
Frankel System Clothes, Inc.
Freeman, H. & Son
Friedman-Harry Marks Clo. Co., Inc.
Goldsmith, Louis, Inc.
Goodmate Co., The
Greif, L. & Bro., Inc.
Gutman, E. & Sons, Inc.
Hammonton Park Clothes, Inc.
Hart, Schaffner & Marx
Hickey Freeman Co.
Jacobs Tailored Clothes
Joseph & Feiss Co., The
K. & G. Clothing Co.
Keller-Heumann-Thompson Co., Inc.
Kirschbaum, A. B., Co., Inc.
Kuppenheimer, B. & Co., Inc.
Lamm Bros.
Langrock Clo. Co.
Layman, Berkwitz & Scott, Inc.
Lebow Brothers
Levy Bros. & Adler Rochester, Inc.
Lieberman, Aron & Sons
Lob-Hubbart, Inc.
Maimon, B.
Makransky, S. & Son
Middishade Co., Inc., The
Morse Leopold Co.

Padi Clothes, Inc.
Philco Clothing Co., Inc.
Pincus Brothers, Inc.
Progressive Clo. Mfg. Co.
Rosenthal, H. B., - Ettlinger Co.
Schloss Bros. & Co., Inc.
Schoeneman, J., Inc.
Seinsheimer, H. A. Co., Inc.
Siegel, Jacob Co.
Silverton Co., The
Singer & Snow Co.
Sonneborn Bros., Inc.
Sportswear, Inc.
Stein-Bloch Co.
Surrey, Robert
Teplich & Eisenberg Bros.
Trimount Clo. Co., Inc.
Walbrooke Clothes, Inc.
Weinberg-Schiller Co.
Weitz, S. & Co.
Wile, H. & Co.
Zeeman & Seligman

Source: Directory of New York, "Men's Wear" (Fall, 1934).

Exhibit B

List of 39 Manufacturers Who Have
Garments Made Up Outside the State
in Which They are Listed

Manufacturer and Location	Location of Contract Shop
New York:	
Alban & Sang, Inc.	Souderton, Pa. Garfield, Pa. Passaic, N. J. Easton, Pa.
Baruch & Hurwitz, Inc.	Passaic, N. J. Clifton, N. J. Garfield, N. J.
Boderman Clothing Co., Inc.	Bangor, Pa. Easton, Pa.
C.M.T. Clothing Co., Inc.	Passaic, N. J. Patterson, N. J. Newark, N. J. South Amboy, N. J. Garfield, N. J.
Leo Greenberg & Shapiro, Inc.	Egg Harbor, N. J. Perkasie, Pa. Vineland, N. J. Hammonton, N. J. Patterson, N. J.
Greenstone Stern Co., Inc.	Scranton, Pa. Wilkes Barre, Pa.
Kaufman & Kaplan	Middletown, Conn. Woodbine, N. J.
Moe Levy & Sons	Baltimore, Md. Perkasie, Pa.
Lewis Bros.	Vineland, N. J. Plainfield, N. J. Hammonton, N. J. South Amboy, N. J.

Manufacturer and Location	Location of Contract Shop
New York (Cont'd)	
Moral Clothing Corp.	Patterson, N. J. Passaic, N. J. Bangor, Pa.
Rose Bros.	Hatfield, Pa. Inside Shop Shippensburg, Pa." " Lebanon, Pa. " " Quakertown, Pa. " " Coopersburg, Pa. Hammonton, N. J. Vineland, N. J. Inside Shop Trenton, N. J.
Senco & Sons, Inc.	Bethlehem, Pa. Easton, Pa.
I. Ashinas & Son	New Haven, Conn. Norwich, Conn. Bayonne, N. J.
Benjamin Bros.	Easton, Pa. Pittston, Pa.
Berman Mfg. Co.	Sellersville, Pa. Quakertown, Pa. Middletown, Conn. New Brunswick, N. J.
Better Clothing Co., Inc.	Baltimore, Md. Quakertown, Pa. Newark, N. J.
Sobel-Goldman	Perkasie, Pa. Pen Argyle, Pa. Bethlehem, Pa. Bayonne, N. J.
Reliable Clothing Mfg., Inc.	Fitchberg, Mass. Bangor, Me. Perkasie, Pa. New Bedford, Mass. Easton, Pa. Trumbauersville, Pa. Perth Amboy, N. J. Lawrenceville, Ga.

Manufacturer and Location	Location of Contract Shop
New York (Cont'd)	
Schwartz-Stony	Clifton, N. J. New Brunswick, N. J. Perth Amboy, N. J. Wilkes Barre, Pa.
Boston	
Ginsburgh Clothing Co.	Newark, N. J.
Modern Pants	Rockland, Me.
H.T.C. Pants Co.	Portland, Me.
Philadelphia	
S. Abrahams	Mapleshade, N. J.
Best Wear Pants Co.	Riverside, N. J.
Louis Goldsmith, Inc.	Parkbora, N. J.
Keystone Tailoring Co.	Red Bank, N. J.
D. Klein & Bros., Inc.	Mapleshade, N. J.
B. Maimon	Riverside, N. J.
J. Maimon & Son	Egg Harbor, N. J.
Wm. C. Rowland	Mapleshade, N. J.
I. Katz Co.	Trenton, N. J.
Joseph H. Cohen Sons Philadelphia, main office cutting, designing, stock. New York City, manufacturing plant.	Philadelphia, Pa. Sellersville, Pa. Perkasie, Pa. Bangor, Pa. Bridgeport, Pa. Sassasmansville, Pa.

Manufacturer and Location	Location of Own Shops
Baltimore	
J. Schoeneman, Inc.	Wilmington, Del. Souderton, Pa. Lansdale, Pa.
L. Greif & Bros.	Fredericksburg, Va. Everett, Pa. Waynesboro, Pa. Mount Union, Pa. Staunton, Va. Stewartstown, Pa. Lancaster, Pa. Sherristown, Pa. Hanover, Pa.

Miscellaneous

H. A. Seinsheimer - Cincinnati, Ohio.
Cincinnati, Ohio - Main Office - cutting and mfg.
New Albany, Ind. - No cutting - manufacturing. Production sent to Cincinnati.

International Tailoring Co. - New York City.
Controls J. L. Taylor & Co. - selling agency.
Cuts and makes to individual order exclusively.
Orders received by J. L. Taylor & Co. are cut by them and made up by International Tailoring Co.
Has no contractors.
Does cut, make and trim for other firms.
Plant in Chicago cuts and makes to individual order.

Curlee Clothing Co.
No contractors.
Plant at St. Louis, Mo., cuts and makes there.
General offices - St. Louis, Mo.
Plant at Mayfield, Ky. - cuts and makes there.

Goodall Co.
Main office - Cincinnati, Ohio - Sales, shipping, stock and cutting.
Shop at Sanford, Maine - cutting only for Cincinnati shop.
Shop at Knoxville, Tenn.
Shop at Loraine, Ohio.

Cohen-Goldman
New York - Main office - cutting - stock.
Plants - Syracuse
Poughkeepsie
New Bern, N. C.
Baltimore, Md.

Source: Code Authority for Men's Clothing Industry.

Exhibit C

Location of Shops in Which Garments are Made
That were Cut in Other States

New Jersey	Pennsylvania	Others
Maple Shade	Trumbauersville	Portland, Me.
Riverside	Perkasie	Norwich, Conn.
Paulsboro	Easton	Fitchberg, Mass.
Red Bank	Wilkes-Barre	Bangor, Me.
Egg Harbor	Philadelphia	New Bedford, Mass.
Mizpah	Pensburg	Lawrenceville, Ga.
Trenton	Quakertown	Baltimore. Md.
Newark	Landsdale	New Haven, Conn.
Garfield	Line Lexington	Chicago, Ill.
Passaic	Pen Argyle	Middletown, Conn.
Hammonton	Bethlehem	Racine, Wisc.
Vineland	Coopersburg	Mount Healthy, O.
Clifton	Scranton	St. Louis, Mo.
Paterson	Sassamansville	Rockland, Me.
South Amboy	Bridgeport	Detroit, Mich.
Jersey City	Sellersville	
Rahway	Bangor	Mayfield, Ky.
Raritan	North Hampton	Fredericksburg, Va.
Plainfield	Dublin	Wilmington, Del.
Perth Amboy	Pittston	Staunton, Va.
Hoboken	Hatfield	New Albany, Ind.
Bayonne	Shippenburg	Knoxville, Tenn.
New Brunswick	Lebanon	Loraine, Ohio.
Woodbine	Souderton	
Lodi	Everett	
Carteret	Waynesboro	
	Mount Union	
	Stewartstown	
	Lancaster	
	Sherristown	
	Hanover	

Source: Code Authority for Men's Clothing Industry.

Exhibit D

List of 19 Manufacturers of Men's Clothing
Showing Location of Retail Outlets

Manufacturer and Location	Name of Retailer and Location	
Jos. Levy 836 Broadway, N.Y.C.	Crawford Clothes	New York City Brooklyn Jamaica Philadelphia Upper Darby
	Sanford Clothes	Brooklyn
	Powers Clothes	Jamaica
Simon Ackerman, Inc. 79-5th Ave., N.Y.C.	Simon Ackerman	Brooklyn Bronx Manhattan
Aplo. Rochester, N.Y. 915 Broadway, N.Y.C. New Brunswick, N.J.	Bond Stores, Inc. (Randall Clothes) (Bond Clo. Co.)	New York City Chicago Cleveland Detroit Akron Toledo Youngstown Columbus Cincinnati St. Louis Lorain Buffalo Boston Dayton Newark Washington Minneapolis Syracuse Rochester
Cohen Goldman Co. 45 W. 18th St., N.Y.C. New Bern, N.C. Baltimore, Md. Syracuse, N.Y.	Broadstreets	New York City

Manufacturer and Location	Name of Retailer and Location	
Brooks Bros. 346 Madison Ave., N.Y.C.	Brooks Bros.	New York City Boston, Mass. Palm Beach, Fla. Newport, R.I.
Kahn Tailoring Co. Indianapolis	English Woollen Co. Capitol Ave. & St. Clair Street	Indianapolis Cleveland Detroit Louisville Dayton
	N.Y.Buying Office	New York City
Fashion Park Clo. Co. Rochester, N.Y.	Fashion Park Associates, Inc. (1457 Broadway, N.Y.C.) Subsidiaries:	
	Desmond's Inc.	Los Angeles
	The Hub, Henry C. Lytton & Sons	Chicago
	Weber & Heilbroner Inc.	New York City
	Brokaw Bros.	New York City
	Shulman & Co.	Norfolk, Va.
	B.R.Baker Co.	(Cleveland) (Toledo)
	Doutrich & Co.	(Harrisburg) (Pottsville)
	Croll & Keck	Reading
	L.Strauss & Co.	Indianapolis
	The Metropolitan Co.	Dayton
	Chaix, Copley Co.	St. Paul
	Juster Bros., Inc.	Minneapolis
	(Finchley)	New York City.
Foreman & Clark Mfg. Co. 28 W. 23rd St., N.Y.C.	(13 stores)	Minnesota Iowa Missouri Illinois California New York City

Manufacturer and Location	Name of Retailer and Location	
Linden Clo.Co. (Jos. Hilton & Sons) 35 E. Elizabeth Ave. Linden, N.J.	Jos. Hilton & Sons 129 Fulton Street.	New York City
Howard Clothes, Inc., 160 Jay St., Brooklyn, N.Y.	Howard Clothes	Boston New York City Syracuse Brooklyn Philadelphia, Pa. Pittsburgh, Pa. Providence, R.I. Jersey City, N.J.
Langrock Clothing Co., New Haven, Conn.	D.T.Langrock, Inc. 268 York St.	New Haven
	Langrock Harvard, Inc.	Cambridge, Mass. Exeter
	The Andover Shop	Andover, N.H.
	Langrock Princeton, Inc.	Princeton Lawrenceville
	Langrock Fine Clothes Inc.	New York City
	The Penn Shop	Philadelphia, Pa.
	Langrock-Brown Inc.	Providence
Moe Levy & Son, Inc. 119-125 Walker St., N.Y.C. and Baltimore, Md.	Moe Levy & Son	New York City Brooklyn Jamaica
S. Mendelson Sons 6103 Euclid Ave., Cleveland, O.	Sherman Stores (25 stores)	Indiana W. Virginia Illinois Pennsylvania Ohio Iowa

Manufacturer and Location	Name of Retailer and Location	
Richman Bros. Co. 1600 E. 55th St., Cleveland, O.	(62 stores)	Ohio Wisconsin Pennsylvania New York State Missouri Michigan Massachusetts Indiana Illinois Kansas Nebraska Minnesota W. Virginia Kentucky
Rogers Peet Co., 842 Broadway, N.Y.C.	(6 stores)	New York City Boston, Mass.
Standard Tlg. Columbus, Ga.	The Schwab Co. (Simon Schwab) (24 stores) Columbus, Ga.	Albany, Ga. Athens, Ga. Atlanta, Ga. Columbus, Ga. Griffin, Ga. La Grange, Ga. Macon, Ga. Rome, Ga. Savannah, Ga. West Point, Ga. Valdosta, Ga. Birmingham,Ala. Dotham, Ala. Huntsville, Ala. Montgomery, Ala. Mobile, Ala. Jacksonville,Fla. Orlando, Fla. Pensacola, Fla. Tampa, Fla. Knoxville, Tenn. Chattanooga, Tenn. Jackson, Miss.
Stein Bros., 149 Fifth Ave.,N.Y.C. Hall-Tate,Knoxville Tenn.	(43 stores)	New York State Vermont Pennsylvania North Carolina Virginia

Manufacturer and Location	Name of Retailer and Location	
Stein Bros. (Continued)		Tennessee Delaware Georgia New Jersey So. Carolina Florida
Stetson "D" Tailors 4 N. Howard St., Baltimore, Md.	Stetson "D" Stores	Tuscaloosa, Ala. Berkeley, Cal. Atlanta, Ga. Chicago New York City Chapel Hill, N.C. Davidson, N.C. Greensboro, N.C. Raleigh, N.C. Stillwater, Okla. Norman, Okla. Philadelphia, Pa. State College, Pa. Lexington, Va. University, Va.
Hart-Schaffner & Marx Chicago, Ill.	Wallach Bros. 114 E. 23rd St.	New York City Brooklyn Jamaica Flushing Newark Trenton

Source: Fairchild's Retail Book

Exhibit E

List of 43 Firms Engaged in Interstate Commerce

Firm Name	Location
Langrock Clothing Co.	New Haven, Conn.
Lee, McClain & Scalzo	Shelbyville, Ky.
Made Right Tlg. Co.	Baltimore, Md.
Michigan Wholesale Tlrs.	Detroit, Mich.
Rosenberg & Saffer	New York City
Roy Tlrs.	Cincinnati, O.
Rude, I.	Denver, Colo.
H. A. Seinsheimer, Co.	Cincinnati, O.
Silverstein & Sons Co.	Cincinnati, O.
Schwartz Tlg. Co.	Cincinnati, O.
Storre-Shaefer Co.	Cincinnati, O.
Superior Tlg. Co.	Cincinnati, O.
Wolfe Bros.	Troy, N. Y.
United Tlg. Co.	Detroit, Mich.
Sure Fit Clo. Co.	Philadelphia, Pa.
Wilson, Tom	Boston, Mass.
Beacon Clothing	Boston, Mass.
Berry Clo. Co.	Pawtucket, R. I.
Biltmore Pants Co.	Baltimore, Md.
Bing, I. & S.	Cincinnati, O.
The Block Co.	Cleveland, O.
Franks Bros.	Lawrence, Mass.
Freedman-Harry Marks	Richmond, Va.
Finkelstein, Sam	Norfolk, Va.
Globe Tlg. Co.	Milwaukee, Wisc.
Goodall Clo. Co.	Cincinnati, O.
Harold Clo. Co.	Cincinnati, O.
H.S.M. Clo. Co.	New York City
Galler & Blaustein	Baltimore, Md.
Malcolm Kenneth Co.	Boston, Mass.
L. Greif	Baltimore, Md.
North Chicago Clo. Co. (Newman Clo.)	North Chicago, Ill.
Sapperstein, I. (Security Wholesale Clo. Co.)	Baltimore, Md.
Standard Tlg. Co.	Columbus, Ga.
United Woolen Co.	Columbus, Ga.
Bodenstein	Streater, Ill.
P. H. Davis Co.	Cincinnati, O.
Detroit Wholesale Tlrs.	Detroit, Mich.
Gate City Mfg. Co.	Kansas City, Mo.
Gross Wholesale Tlrs. Inc.	Denver, Col.

Firm Name	Location
Hochschied Wholesale Tlrs.	Mt. Healthy, O.
Levine Bros.	Cincinnati, O.
Yellow Cab Co.	Chicago, Ill.

12 Firms not Definitely Known to be Engaged in Interstate Commerce, of the Total of 55 which have been Certified to the National Compliance Board

Firm Name	Location
Cohen, Goldwater Mfg. Co.	Los Angeles, Calif.
Davis Clo. Co.	Boston, Mass.
Eagle Blue Serge	Philadelphia, Pa.
English Woolen Mills	Indianapolis, Ind.
Freeman Bros.	Chicago, Ill.
Kendig, S. H.	Landsdale, Pa.
Michael Tlg. Co.	Detroit, Mich.
Modern	St. Louis, Mo.
Overglobe Clo. Co.	Boston, Mass.
Monarch Tlg. Co.	Chicago, Ill.
Peters, M.	Syracuse, N. Y.
Star Novelty Coat Co.	Brooklyn, N. Y.