

**THE WOOL INDUSTRY,
COMMERCIAL PROBLEMS OF
THE AMERICAN WOOLEN AND
WORSTEN MANUFACTURE**

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The wool industry, commercial problems of the American woolen and worsten manufacture by Paul T. Cherington

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WORSTED MANUFACTURE

BY

PAUL T. CHERINGTON

*Assistant Professor of Marketing in the
Graduate School of Business Administration
Harvard University*

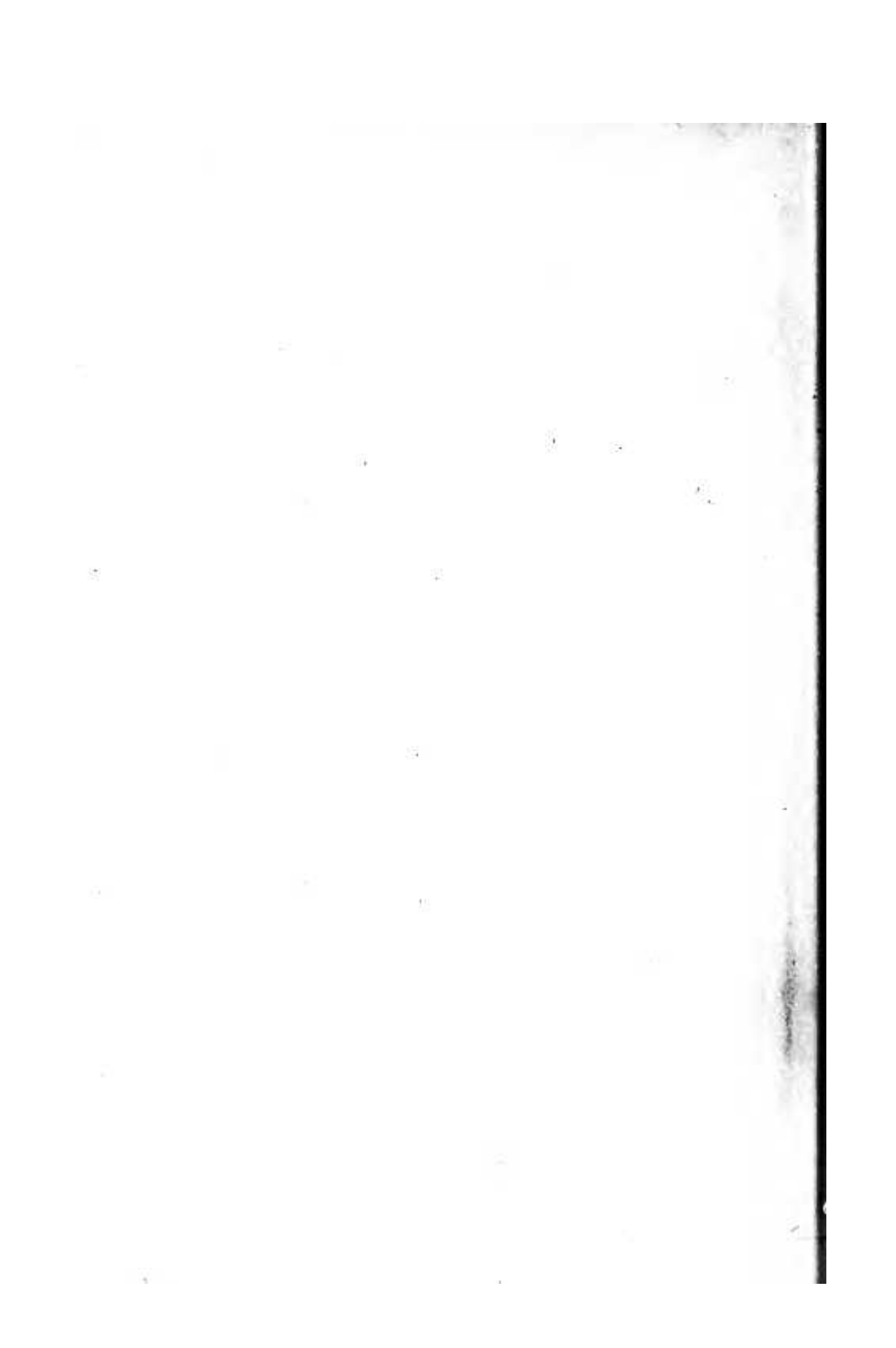


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ON THIS UNEDITED PAGE I
WANT TO EXPRESS SOME
PORTION OF MY GRATITUDE
TO THE EDITOR OF THIS
SERIES FOR HIS STIMU-
LATING AND CONSTRUCTIVE
CRITICISM. IT GIVES ME GEN-
UINE PLEASURE, THEREFORE,
TO DEDICATE THIS BOOK
TO
EDWIN FRANCIS GAY



PREFACE

THIS book is a study of commercial problems. Its purpose is to present the results of an examination of the industries producing woolen and worsted fabrics approached from the side of their buying and selling problems. It does not attempt to add anything to the existing body of excellent material covering sheep-breeding, wool-growing, the relation of the tariff to the growth of these industries, the technique of textile manufacturing, and the other more commonly treated features.

Sheep-breeding and wool-growing in the United States are adequately considered in a *Special Report on the Sheep Industry of the United States* (1892), issued by the Department of Agriculture of the Federal Government, and in various secondary works, such as Joseph E. Wing's *Sheep Farming in America*. J. Zipser, in his *Textile Raw Materials*, gives a good description of the technical aspects of wool and its treatment up to, and including, the spinning process. J. H. Clapham, in his *Woollen and Worsted Industries*, gives a clear and accurate statement of the main features of the mechanical processes of cloth-manufacture. A bulletin issued by the Department of Commerce and Labor, *Miscellaneous Series, number 34*, which appeared just as this study was going to press, contains a satisfactory summary of some noteworthy conditions of the men's factory-made clothing industry. Concerning the tariff, numerous publications have been issued. *The Bulletin* of the National Association of Wool Manufacturers treats of current developments in the tariff problems from the

protectionist side. *The Special Tariff Number*, March, 1909, may be mentioned as a particularly good résumé of the arguments in favor of tariff protection to the American woolen and worsted industries. Professor F. W. Taussig, in his *Tariff History of the United States*, and in his *Some Aspects of the Tariff*, traces in detail the relation between the tariff and the wool-growing and manufacturing industries. C. W. Wright, in his *Wool-Growing and the Tariff*, covers more fully the effects of the tariff upon wool-growing, and incidentally gives an admirable account of the development of the manufacturing industries down to 1860. The *Tariff Board Report on Wool and Manufactures of Wool* gives perhaps the fullest summary of these industries as they existed in this country in the year 1911-12. With these and other good books easily accessible, it does not seem to be advisable to give more than incidental attention to those phases of the subject which they have covered so well.

Early in this investigation it was observed that the characteristics of the woolen and worsted industries are determined, not so much by problems of raw material supply, or of cloth-production, as by the problems involved in marketing the finished fabrics. It became evident, for example, that the present relative importance of the output of worsteds, as compared with woolens, is not due to the greater number of sheep being grown which produce wool suitable for such fabrics. On the contrary, it appeared that in whatever connection exists between these phenomena, the change in the character of the demand for fabrics is the cause, and the change in the character of wool-growing the effect, rather than vice versa. Again, the large scale of the worsted mills and their marked geographic concentration seem to be largely due to the conditions under which staple

worsteds are sold. In other words, it became plain that in both industries, the causal forces in the development of the production activities are the wants and habits of the buying public. Therefore, the course of this development can only be satisfactorily explained as primarily a result of efforts to adjust these industries to developments and changes in the problems of textile-selling.

The body of printed matter covering these commercial phases of the subject is very meager. On this account, anyone working in this field is obliged to depend largely upon the knowledge, views, and opinions of those "in the trade." I have found the men engaged in the various commercial activities in these industries to be generous and frank in their attempts to help me find and accurately state the truth, and I take this occasion to express my keen appreciation of the assistance received from them. But these helpers have had points of view ranging from those of sheep-breeders in Montana to those of mill stylers in New York. It is probable, therefore, that I have not been able to interpret accurately all that has been said to me. I am conscious that, notwithstanding the exercise of all possible care, errors of fact as well as of judgment doubtless still remain in the book. I shall welcome correction of any of these errors.

It is with no illusions as to their perfection or finality that I let these chapters go from my hands. It is rather with the hope that the method of approach to the subject which I have employed, and which I believe is new, may be suggestive to workers in this and other fields. I am convinced that an important feature of college training for men entering business will be a much more thorough study of marketing problems than has hitherto been made. I believe, also, that economists will find a detailed study of